accruent

EMS Desktop Client

Installation, Configuration, & User Guides

V44.1

April 2019

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CHAPTER 1: Introduction to EMS Desktop Client (V44.1)

This section covers the installation and maintenance of EMS Desktop Client. EMS Desktop Client is used by System Administration, IT, and some expert users to maintain software settings and to manage space and resources.

Note:
If you are new to EMS Desktop Client, get started by Learning About Managing EMS.

Note:
The Installation, Configuration, and User Guides for the EMS Desktop Client apply to all of the following editions:

- EMS Enterprise
- EMS Professional
- EMS Campus Planning Interface

These editions are controlled and based on the EMS Desktop Client; however, their capabilities and features vary and are noted throughout the documentation.

This topic provides the following information:

- Understanding User Types
- Everyday User Reservations
- EMS System Architecture
- Upgrading
- Product Registration

See Also: Contact Support

Understanding User Types

There are two different user types in EMS:

1. **Administrators**: These expert users create and maintain the EMS application within your organization, and manage or approve usage of space. Administrators include conference center managers, event coordinators, registrars, facility and real estate managers, and service providers. They can use this tool to set up and control the booking process and booking templates, define space (buildings, rooms, floors, areas, and regions), define services, manage security and user permissions, grant access, initiate notifications and reports, and integrate with other applications, servers, databases,

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and systems. Administrators can include Service Providers (Catering, Audio Visual, IT Support Staff), Security, and Receptionist Staff. These users will primarily use the EMS Desktop Client.

2. **Everyday Users**: This is a majority of the users in the organization. Everyday Users, such as an employee who needs to book a conference room or a consultant who needs to book a hoteling space for the day, can use it to make reservations and book meetings. Everyday Users are typically requesting rooms and services. These users do not use the EMS Desktop Client, they will primarily use the web based application, EMS Web App in V44.1 (referred to as VEMS if using V44).

Everyday User Reservations

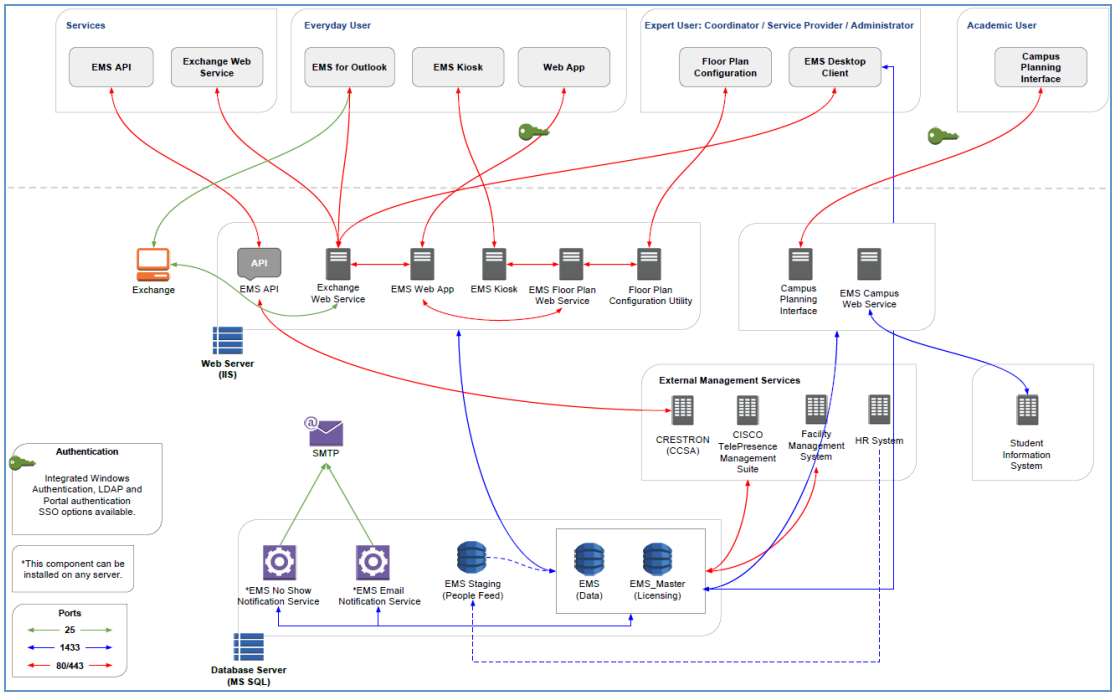
An Everyday User Reservation is any reservation that a user has submitted through EMS Web App.

The everyday user reservation searching tool in the EMS Desktop Client 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 Everyday User Reservation tool is set to Everyday User 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 Everyday User Reservation searching tool.

To open this tool in EMS Desktop Client, click the Everyday User Reservations icon on the EMS toolbar.

EMS System Architecture

The EMS Desktop Client is the foundation for a broad range of components, services, web applications, APIs, add-ons, and integrations.



Upgrading

If you are upgrading to a newer version of EMS, please encourage users at your facility to read the release notes 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 the EMS-related components you have licensed must be upgraded with this release.

Product Registration

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.

- Configuration
- System Administration
- EMS Campus specific functionality or the Academic Import Utility

Note:

Please keep in mind that some discrepancies (e.g., differences in behavior and/or exclusions) will exist.

CHAPTER 2: Systems Requirements and Prerequisites

Operating System
Windows 7 (32-bit and 64-bit)
Windows 8 (32-bit and 64-bit)
Windows 8.1 (32-bit and 64-bit)
Windows 10 (32-bit and 64-bit)
.NET Framework 4.6.1

EMS Database Server

Compatibility Level	Version	DB Compatibility
110	Microsoft SQL Server 2012 = 11.00.XXXX	110
120	Microsoft SQL Server 2014 = 12.00.XXXX	110 (avoid CL for 2014)
130	Microsoft SQL Server 2016 = 13.00.XXXX	130

Important!

2017 is not yet officially supported by EMS Software.

EMS Web Server

Operating System	IIS VERSION
Windows Server 2016	10.0
Windows Server 2012	8.0
Windows Server 2012 R2	8.5
Windows Server 2016	

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Operating System	IIS VERSION
Prerequisites	
Application Pool Running	(2.0 or 4.0 depending on the EMS Software Application)
.NET Framework 4.6.1**	
Minimum System Requirements Processor: 2.0 GHz and 4 cores or faster Memory: 8 GB or more** Hard-Disk Space: 1 GB or more *For up to 100 concurrent users. Increased specs required for 100+ concurrent users.	

*Requires an update to Windows Management Framework to version 3.
**= varies per EMS Software Application

CHAPTER 3: Installation Instructions

> **Note:**
>
> **EMS Cloud Services Customers**
>
> The installation and updating information in this topic does not apply to EMS Cloud Services customers. For more information regarding the installation and updating of EMS software with Cloud Services, please refer to the .

This topic will discuss the following installation steps:

- Preparation: Installing EMS Server Components
- Installing EMS on User's Computers
- EMS Desktop Client Web Deployment
- Install EMS Desktop Client (Web Deployment Method)
- Installing EMS Desktop Client (Conventional Method)
- Obtain Installation Files for EMS Desktop Client

In order to install EMS, you must perform two operations :

1. Preparation: install server components.
2. Install the application on user's computers.

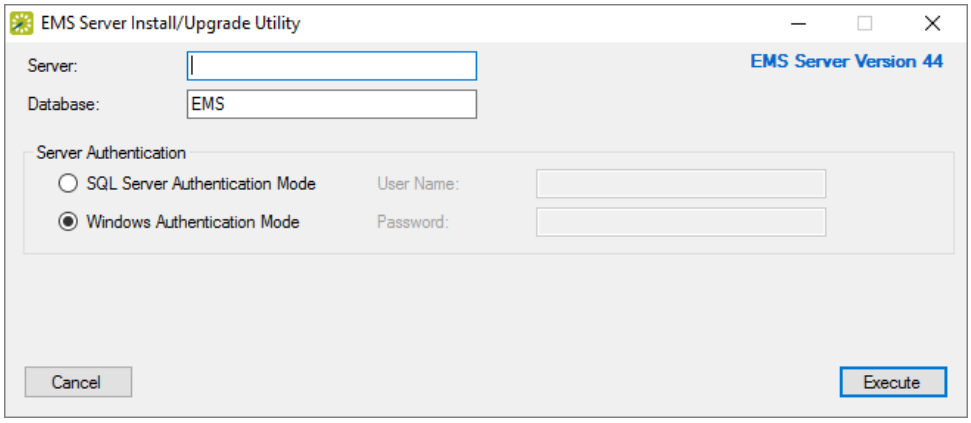
See Also: EMS Desktop Client Deployment Options for a more in-depth discussion.

Preparation: Installing 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 is 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** as an Administrator. (This .exe can be run from any PC that has access to your database server.)



EMS Server Install/Upgrade Utility

4. In the Server text box, enter the name of the server running MS SQL Server.
5. In the Database text box, 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 dialog 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 EMS on User's 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, using one of the following methods:

1. EMS Desktop Client Web Deployment
2. Installing EMS Desktop Client (Conventional Method)

Important!

Before beginning the installation process, please install or upgrade your EMS databases. Existing versions of EMS Desktop Client Web Deployment must be manually uninstalled. Be sure to copy-off and save any files that have been customized.

See Also: Decision Guide

EMS Desktop Client Web Deployment

Important!

Before beginning the installation process, please install or upgrade your EMS databases.

Important!

Existing versions of EMS Desktop Client Web Deployment must be manually uninstalled. Be sure to copy-off and save any files that have been customized.

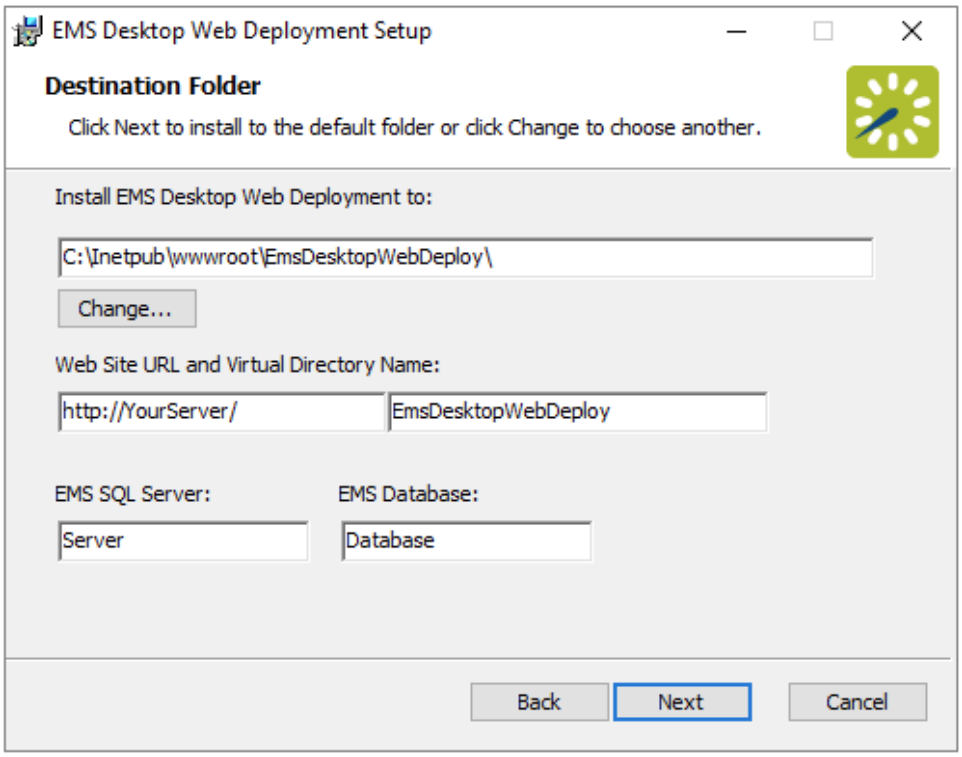
Web Deployment Pre-Installation Instructions

1. Manually **uninstall**any previous versions of EMS Desktop Client Web Deployment on your web server.
2. Verify that the prerequisite software has been installed.
3. Download the **EMSDesktopWebDeploySetup.msi** file onto the web server that will be running The

EMS Desktop Client Web Deployment.

4. Run **EMSDesktopWebDeploySetup.msi** as an administrator.

5. The first screen welcomes you to The EMS Desktop Client Web Deployment Setup Wizard. Click **Next** to begin the installation process. The *Destination Folder* screen will appear.



Destination Folder of the EMS Desktop Web Deployment Setup

6. Select the destination folder. The installation process will create a new physical directory on your web server based on the destination folder path entered ("EMS Desktop Web Deploy" in the example above.).

7. Enter your SQL Instance Name.

8. Enter your Database Name:

   - EMS Professional customers – typically named "EMSdata"
   - EMS Workplace, EMS Campus, EMS Enterprise, EMS District and EMS Legal customers - typically named "EMS"

9. The Virtual Directory Name will default to the destination folder specified in Step 6. 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 ("EMS Desktop Web Deploy" in the example above.) Click **Next**.

> **Note:**
> The EMS Desktop Client Web Deployment 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 Desktop Client Web Deployment.

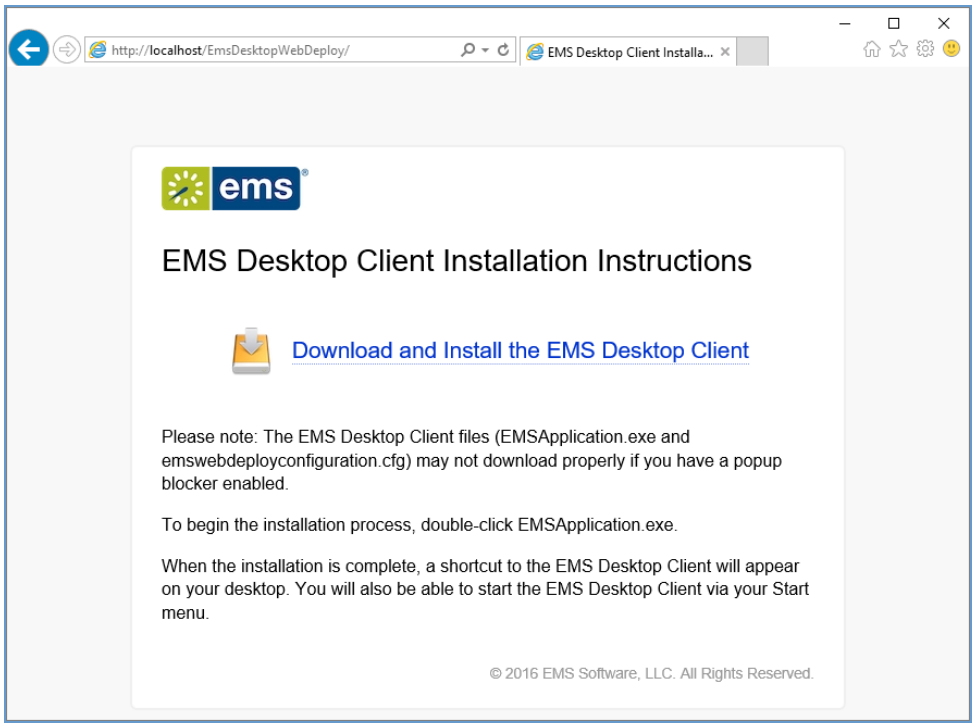
10. The *Ready to install* the EMS Desktop Client Web Deployment screen will appear. Click to install The EMS Desktop Client Web Deployment.
11. The *Completed* the EMS Desktop Client Web Deployment *Setup Wizard* screen will appear. Click **Finish**.
12. After following the steps above, verify your EMS Desktop Client Web Deployment installation by opening a browser and entering the address:

    `http://[ServerName]/EMSDesktopWebDeploy/` (replace [ServerName] with the name of your web server)

> **Note:**
> The first time you launch the EMS Desktop Client Web Deployment, it might take a few extra moments for the website to display. If you encounter any issues, please contact Customer Support for assistance.

Install EMS Desktop Client (Web Deployment Method)

1. To install the EMS Desktop Client, users will need to access the URL from the EMS Desktop Client Web Deployment.

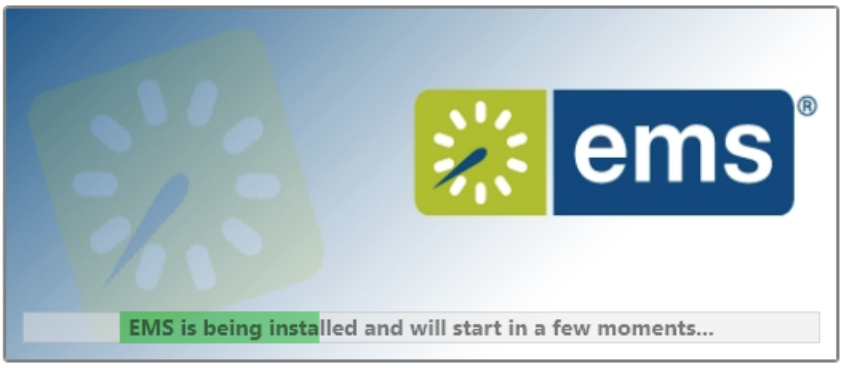


EMS Desktop Client Web Deployment

> **Note:**
> If your browser has a popup blocker it should be disabled so that both the EMSApplication.exe and the configuration file can be downloaded.

2. Click **Download and Install the EMS Desktop Client** to download the **EMSApplication.exe**.

3. Run the **EMSApplication.exe**. This will install the client locally from the service:



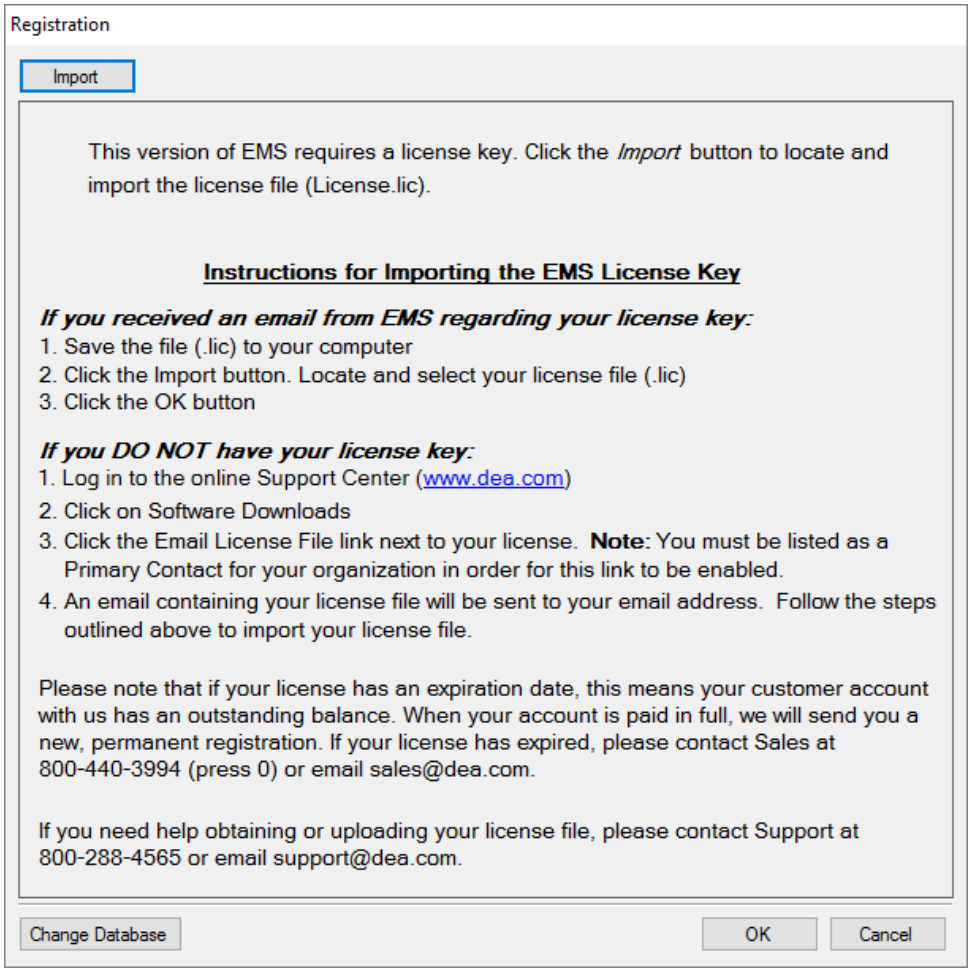
EMS Desktop Client Install Screen

> **Note:**
> When you launch the EMSApplication.exe if it asks for the EMS Web Deploy configuration URL it will require entering the EMS Desktop Client Web Deployment URL:
>
> http://[ServerName]/EMSDesktopWebDeploy/ (replace [ServerName] with the name of your web server)

4. The EMS icon will be placed on the users desktop.

> **Note:**
> When a user launches the client, it will check the EMS Desktop Client Web Deployment for a new version of the Client.
>
> Clients installed through the EMS Desktop Client Web Deployment will not require administrative permission to install.

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.



Registration Screen

> **Note:**
> Your license key only needs to be imported once.

7. At the EMS log-in screen, type **admin** as both the User ID and the Password.
8. Click **OK**.

> **Note:**
> When an EMS Client is installed through the EMS Desktop Client Web Deployment it will only be able to connect to the EMS instance received from the service.

Installing EMS Desktop Client (Conventional Method)

Follow these instructions to conventionally install the EMS Desktop Client on individual workstations.

Pre-Installation Instructions

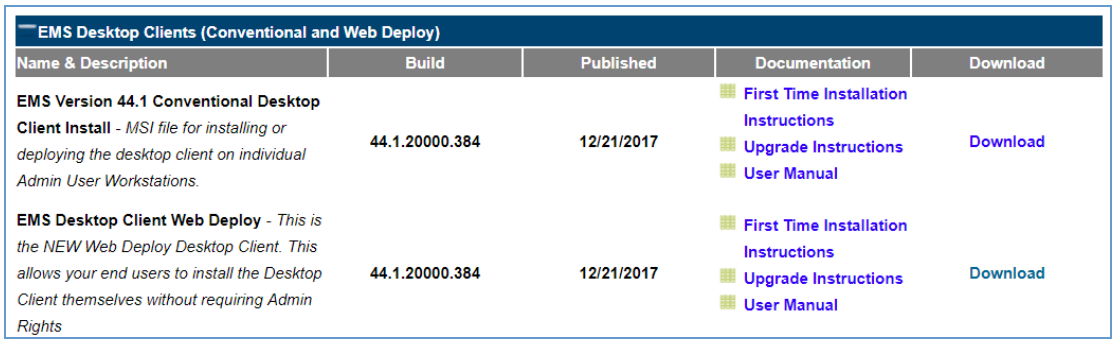
1. Enable the Windows Component .NET 4.5 be on the client machine.

   The client must also have access to the EMS Server component (to the Desktop Client API, or directly to the EMS Database).

2. Obtain the Required MSI file (see Obtain Installation Files for EMS Desktop Client below).

3. Log in to the EMS Product Portal.

4. Navigate to the **Software & Documents Library** > **New Releases and Patches** > **EMS Desktop Clients (Conventional and Web Deploy)**.



EMS Desktop Clients (Conventional and Web Deploy)

Name & Description	Build	Published	Documentation	Download
EMS Version 44.1 Conventional Desktop Client Install - *MSI file for installing or deploying the desktop client on individual Admin User Workstations.*	44.1.20000.384	12/21/2017	First Time Installation Instructions Upgrade Instructions User Manual	Download
EMS Desktop Client Web Deploy - *This is the NEW Web Deploy Desktop Client. This allows your end users to install the Desktop Client themselves without requiring Admin Rights*	44.1.20000.384	12/21/2017	First Time Installation Instructions Upgrade Instructions User Manual	Download

Note:

When you install, the application loads into the "Program Files", "Program Files (x86)", (or a custom directory that you specify). The first time the application is run by a user it will prompt the user to enter in the Server and Database. These entries are saved in the user's registry. The next time the application is accessed, it will not prompt the user for this information again. If upgrading from a previous version, the desktop client will search for the connection string from the previous version, and update the current version so the user is not prompted to enter that information.

Set the Server Programmatically

Option 1: Set the registry keys for the user

The Server and Database information are stored in Keys in the following location:

32bit Machines: HKEY_CURRENT_USER\Software**EMS Software\Version44.1**

There will be two string values—one for the server and one for the database.

Option 2: Use switches in the executable

There are two switches that can be used with the applications executable (ems.exe). You can use these within a shortcut that you give to the user to specify the Server and Database for them.

```
/s=Servername.domain.local
/d=DatabaseName
```

Replace "`Servername.domain.local`" with the Domain name of your Database Server and `DatabaseName` with the Database of the Database of EMS that the user needs to connect to.

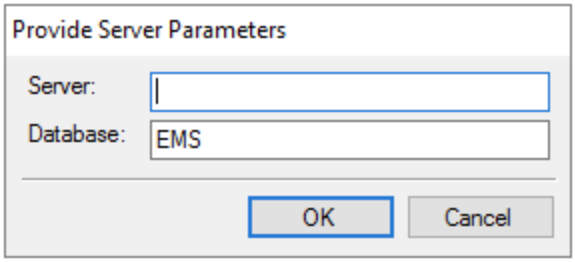
For Example: `C:\Program Files(x86)\EMS\EMS.exe /s=Servername.Domain.local /d=DatabaseName`

Establish Network Connections

The conventional EMS Desktop Client connects directly to the database server for all related transactions. The EMS Desktop Client might also need to connect to the following services:

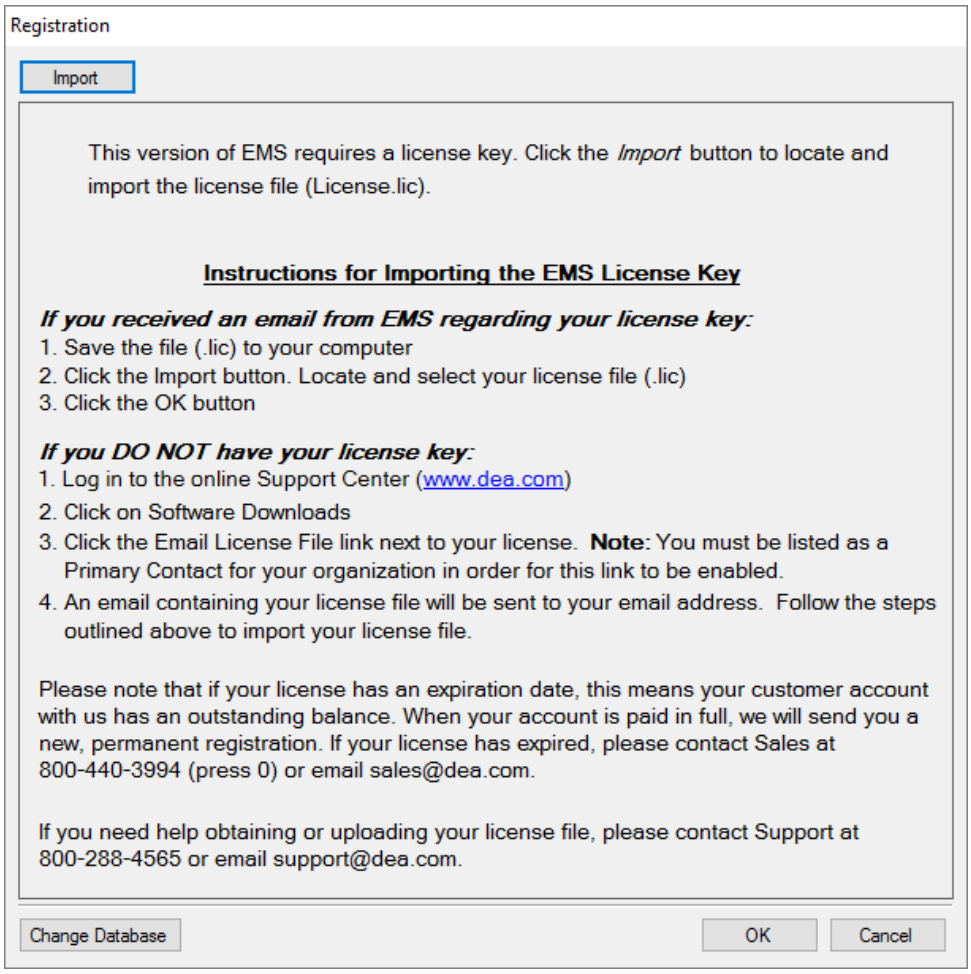
- EMS Web Server
- SMTP Server
- LDAP Server

1. Verify that the prerequisite software has been installed.
2. Secure the **EMSClient.msi**. (See Obtain Installation Files for EMS Desktop Client below.)
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.



Provide Server Parameters Dialog

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.



Registration Screen

> **Note:**
> Your license key only needs to be imported once.

9. At the EMS login 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 Setting Up EMS or you can install to additional client computers by repeating **steps 1-6** above.

Obtain Installation Files for EMS Desktop Client

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

1. Log into Accruent Access.
2. Click **My Products**.
3. Under **EMS**, click **Downloads**.

   The downloads page opens in a new browser tab.
4. In the **Software Downloads** area, click the link for your version of software, for example, **V44.1 Releases & Patches**.

   A new page opens listing the downloads available based on your license.
5. 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.

CHAPTER 4: Upgrade Considerations

When planning your upgrade to the EMS Desktop Client V44.1, be sure to take the following changes in functionality into consideration.

Everyday User Process Template Configuration

After you upgrade your system, all everyday user process templates will be set to **Enabled for Web Application.** This means that these templates will be potentially available to everyday users of the EMS Web App (under the **Create a Reservation** menu). If you would prefer that a template is only available to users of EMS for Outlook and/or EMS Mobile App, you must disable the setting **Enabled for Web Application** under the process template's configuration (**Configuration** > **Everyday User Applications** > **Everyday User Process Templates** > **Edit** the template > **Process Template** tab).

The following process template settings will also persist after upgrade:

- *Allow Invitations = Enable Integration to Microsoft Exchange*
- *Outlook = Enable EMS for Outlook*
- *Enable for Mobile Device = Enable for EMS Mobile App.*

Everyday User Web Menu Changes

- After you upgrade, all everyday user process templates will move under the **Create a Reservation** parent menu.
- All custom web menus (i.e., any non-system-generated web menus such as *Browse, Create a Reservation, Help,* etc.) will move under the **Links** menu. Administrators can change the sequence of these custom menus and/or move custom menus to the **Help** menu by changing the web menu configuration (**Configuration** > **Everyday User Applications** > **Web Menus**).

Additional Default Settings

- If the existing Default Setup Type for a room does not match a Setup Type configured as **In Use**, **Default Setup Type** will revert to **(none)**.

Additional System Changes

- TMS and Polycom DLL access will be controlled by both EMS Desktop Client user permissions and licensing. In order for a user to access the desktop client menu for TMS or Polycom settings, an administrator must apply these settings to the user or the user's template under **System Administration** > **Security** > **Users** or **User Templates**.

No Considerations Needed

The following items, which are typically affected by EMS upgrades, are not affected for this release.

- Any label changes within the desktop client
- Parameter Tab/Area/Name Label Changes or Reassignments
- New functionality introduced with V44.1

CHAPTER 5: Upgrade Instructions

> **Note:**
>
> **EMS Cloud Services Customers**
>
> The installation and updating information in this topic does not apply to EMS Cloud Services customers. For more information regarding the installation and updating of EMS software with Cloud Services, please refer to the .

In order to upgrade EMS, you must perform two operations:

- Upgrade the EMS Server Components
- Upgrade Individual Workstations
  - EMS Desktop Client Web Deployment
  - Install Additional EMS Services

> **Note:**
>
> If you are upgrading from a version of EMS released prior to server version 35, please contact Customer Support.

> **Note:**
>
> You can see a summary of all EMS Updates for V44.1 here.
>
> To learn more about our release update process, see Updating to the Latest Version of EMS and How Are EMS Applications Updated.

Upgrade the EMS Server Components

The server upgrade process will upgrade the EMS databases on your MS SQL Server. If you are upgrading from EMS Enterprise 4.x or below, your existing **EMSEnterprise_Master** database (which 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.

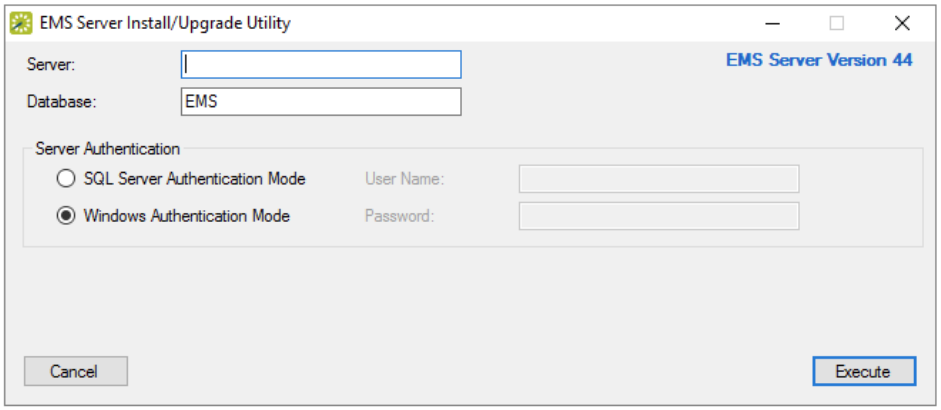
1. Download the **EMS.ServerInstall.exe** file from the Downloads area of Accruent Access.

   To view the Downloads area, log into Accruent Access and click **My Products** > **EMS Downloads** (opens a new tab) > **V44.1 Releases & Patches** (in Software Downloads area).

2. Using **SQL Server Management Studio**, back up your existing EMS databases.

3. Run **EMS.ServerInstall.exe**.

   This .exe can be run from any PC that has access to your database server.



4. In the Server field, enter the name of the MS SQL Server.

5. In the Database field, enter the name of the EMS database you want to upgrade.

6. In the Server Authentication area, specify your MS SQL Server authentication credentials.

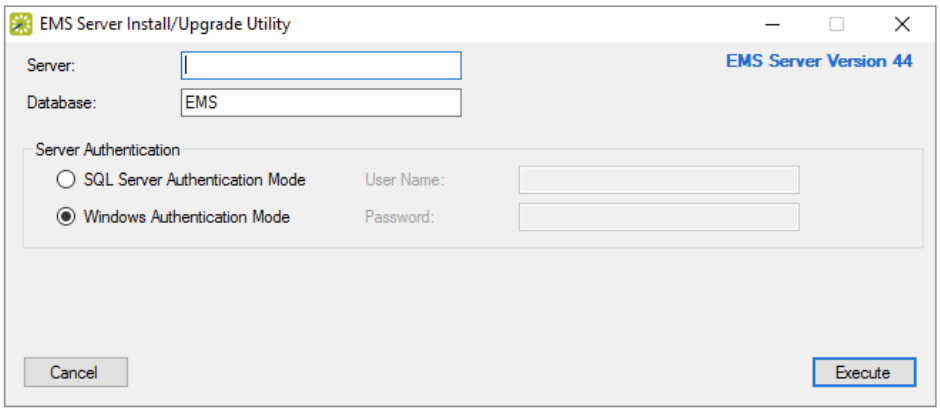
   If **SQL Server Authentication Mode** is selected, you will be required to specify a **User Name** and **Password**.

7. Click the **Execute** button.

   A Backup Database pop-up window will appear.

8. 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 individual workstations.



Note:

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

Upgrade Individual Workstations

Follow the procedures below to upgrade individual workstations to EMS Desktop Client.

EMS Desktop Web Deployment

Note:

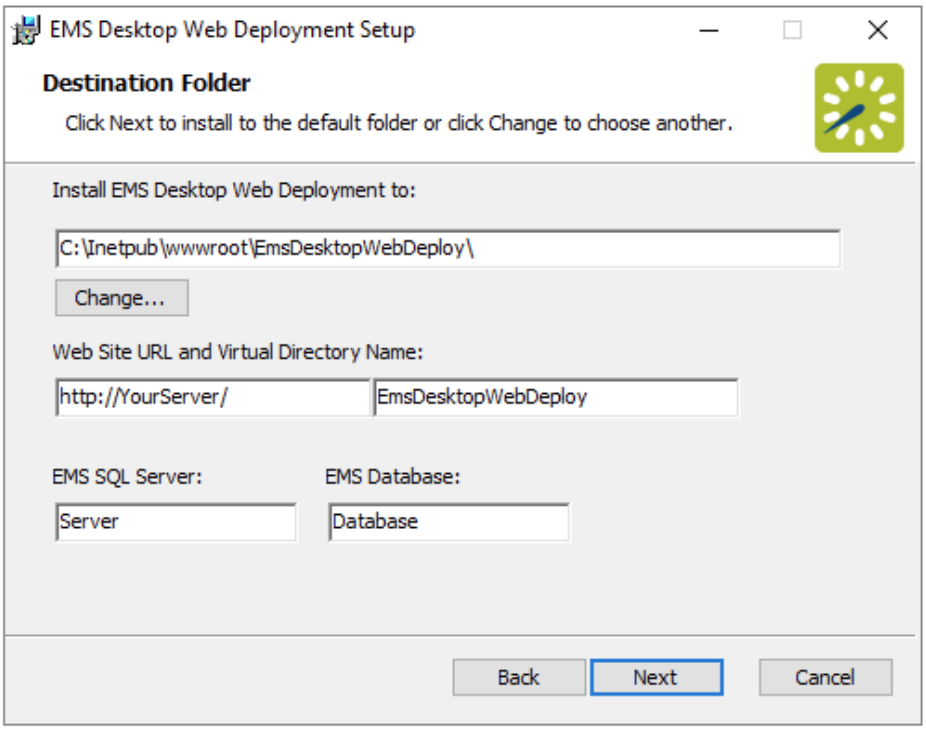
Before beginning the installation process, please install or upgrade your EMS databases.

To learn more about EMS Desktop Web Deployment, see the Web Deployment Decision Guide. If you choose not to use this option, skip to the Conventional Desktop Client Installation section.

1. Manually *uninstall* any previous versions of EMS Desktop Web Deployment on your web server.
2. Verify that the prerequisite software has been installed.
3. Download the **EMSDesktopWebDeploySetup.msi** file onto the web server that will be running EMS Desktop Web Deployment.
4. Run the **EMSDesktopWebDeploySetup.msi** as an administrator.

5. On the welcome screen of the EMS Desktop Web Deployment Setup Wizard, click **Next** to begin the installation process.

   The *Destination Folder* dialog will appear.



6. In the **Install EMS Desktop Web Deployment to** field, select the destination folder where you want to install the EMS Desktop Web Deployment.

   The installation process will create a new physical directory on your web server based on the destination folder path you entered ("EMSDesktopWebDeploy" in the example above.).

7. In the **Web Site URL and Virtual Directory Name** fields, enter your SQL instance name.

8. In the **EMS Database** field, enter your Database Name: the Virtual Directory Name will default to the destination folder specified in Step 6. 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 ("EMS Desktop Web Deploy" in the example above.)

9. If you will be using a Load Balancer with the EMS Desktop Web Deploy application, enter the Name or IP Address of your server in the **EMS SQL Server** field.

10. Click **Next**.

> **Note:**
> The EMS Desktop Web Deployment 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 Desktop Web Deployment.

11. The *Ready to install* the EMS Desktop Web Deployment window will appear. Click **Install**.
12. The *Completed EMS Desktop Web Deployment Setup Wizard* window will appear. Click **Finish**.
13. After following the steps above, verify your EMS Desktop Web Deployment installation by opening a browser and entering the address:

    http://[ServerName]/EMSDesktopWebDeploy/ (replace [ServerName] with the name of your web server)

> **Note:**
> The first time you launch the EMS Desktop Web Deployment, it might take a few extra moments for the page to display. If you encounter any issues, please contact Customer Support for assistance.

Install Additional EMS Services

All optional EMS features, services, and add-ons are listed here. You might need to install or upgrade additional features.

Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

> **Important!**
> If you do not have a customer login, register here.

CHAPTER 6: Downgrade the EMS Desktop Client Web Deploy

When determining whether you organization wants to revert to an older version of the EMS Desktop Client, follow the steps below.

> **Note:**
> You cannot roll back an EMS Patch once it has been applied. Please read the release notes each month to determine if an upgrade is necessary for your organization. As a best practice, it is recommended that your system remain current on EMS Desktop Client builds and patches.

1. Uninstall the newer version of the EMS Desktop Client Web Deploy.
2. Run the installer for the older version of the EMS Desktop Client Web Deploy.

> **Note:**
> Once the older version of the EMS Desktop Client Web Deploy is installed, users will need to close EMS before they will be downgraded to the older version of the software. Any user who has an individual install of the EMS Desktop Client will also need to have that individual install rolled back, by uninstalling the EMS Client and installing the older version.

3. After the users' EMS Desktop Client software have been downgraded, they will receive a message prompt stating there is new client software available.
   If you want to prevent this prompt from appearing to your users after installing the older version of the EMS Desktop Client Web Deploy, run the following script against the EMS database:

```
Update tblServerVersion
set ClientVersion = NULL
```

Contact Customer Support

If you have further questions, please contact Customer Support.

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

Important!

If you do not have a customer login, register here.

CHAPTER 7: Switching Between Environments for EMS Desktop Client Web Deploy

Users can switch their EMS Desktop Client between on-premise test and production environments, between on-premise and cloud hosted environments, or between cloud hosted test and production environments. See Also: Install EMS Desktop Client Web Deploy.

Note:
The EMS Desktop Client runs from the executable file located here: C:\Users\Username\AppData\Roaming\EMS2016\EMSApplication.exe. Because we can't point to any two of these environments with the same EMS executable Desktop Client file, users must clear the EMS registry entry and then point to the desired environment.

1. Clear the EMS registry entry by utilizing the "Reset EMS V44.1 Connection.reg" file. The content of this file is as follows:

```
Windows Registry Editor Version 5.00

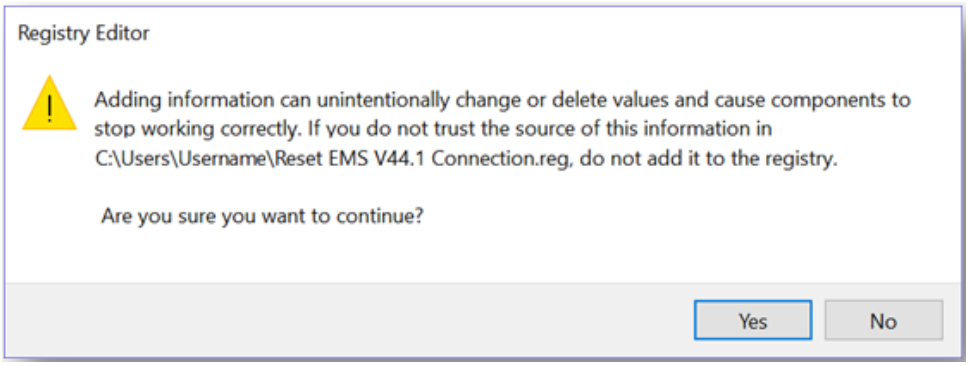
[HKEY_CURRENT_USER\SOFTWARE\EMS Software\Version 44.1]

"AppFacadeUrl"=-
```

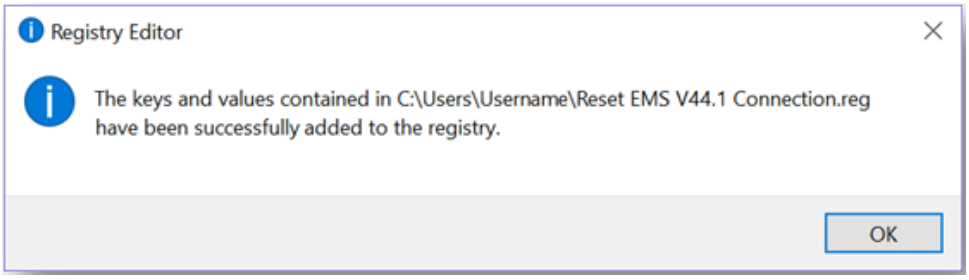
Note:
This file can be shared with users via SFTP as most e-mail programs will block attachments with the .reg extension. Alternatively, the file can be renamed with a .txt extension and then renamed again on the user side back to .reg. Or users can copy the three lines above into a text editor and save the file as "Reset EMS V44.1 Connection.reg."

2. Save the registry editor file "Reset EMS V44.1 Connection.reg" on the hard drive of the EMS Desktop Client user and run it.

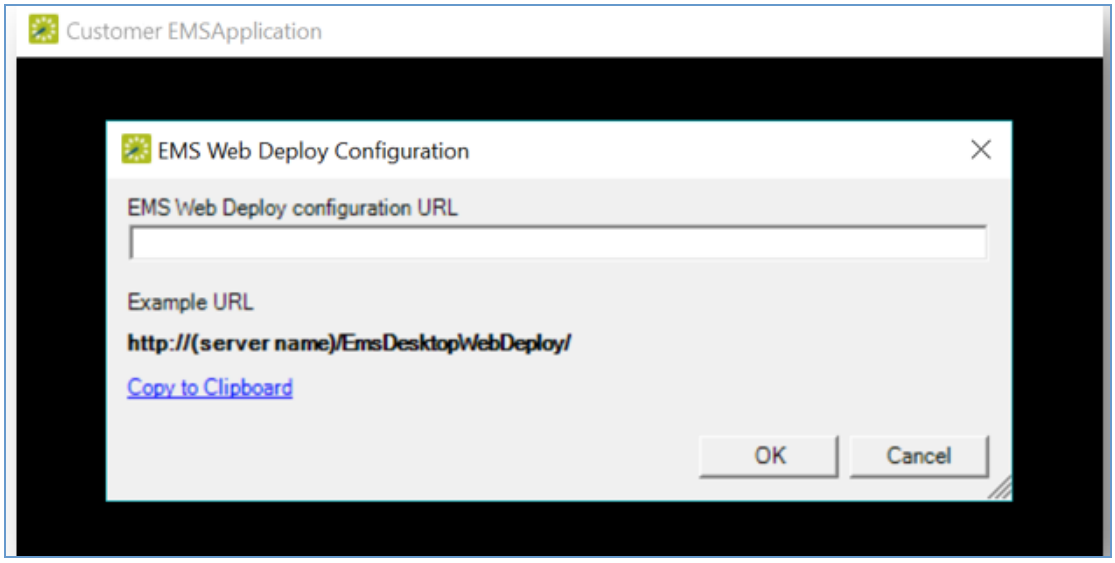
3. Click **Yes** to the following warning:



4. Click "OK" to the second informational message:



5. Launch the Desktop Client from the EMS Desktop Client executable file or EMS icon .
6. Enter the EMS Desktop Client URL corresponding to the desired environment in the EMS Web Deploy Configuration window and click "OK". This will launch the EMS Desktop Client for the specified environment.



7. Settings are saved from the last time the EMS Desktop Client was accessed.
8. These steps must be repeated only when a user wants to switch environments.

CHAPTER 8: Install Custom Reports in EMS Desktop Client

If your organization has a custom developed report that needs to be deployed there are two methods, one through the EMS Desktop Client Web Deploy and another through the EMS Desktop Client Install.

Important!

As of Update 27 (July 2018), changes were made to the EMS Desktop Client to better support future custom reports and changes to existing custom reports. As such, any customers on 44.1 that are currently using an EMS Custom Report will need to contact EMS Support or their Consultant to obtain a new DLL file if they intend to deploy Update 27 of EMS Desktop Client.

This change also applies to the Glance DLL, TMS, Polycom, and Custom Badges.

EMS Desktop Client Web Deployment

1. Obtain your organization's Custom Report DLL and SQL Overlay script from support.
2. Locate the EMS Desktop Client Web Deployment location on the Web Server. Typically this is C:\inet-pub\wwwroot\EmsDesktopWebDeploy\.
3. Open the Installer folder and locate the EMS.zip file.
4. Unzip the EMS.zip file to a location on the PC.
5. Place the Custom Report DLL in the EMS folder.
6. Zip the new EMS folder containing the DLL and name the zip file EMS.
7. Place new EMS.zip file containing the Custom Report DLL back in the Installer folder.

EMS Desktop Client Individual Install

1. Obtain your organization's Custom Report DLL and SQL
2. Overlay script from support. Locate the local install of the EMS Client. Typically it is: C:\Program Files (x86)\EMS\.
3. Place the Custom Report DLL in the EMS folder.

CHAPTER 9: EMS Desktop Client Configuration Guide

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 guide provides instructions to IT and System Administrators for setting up the EMS Desktop Client:

- Starting EMS
- Overview of EMS Desktop Client Configuration
- Authentication Options for EMS Desktop Client
- EMS Main Window
- EMS Browser Window
- Configuration > Facilities
  - Introduction
  - Overview of Configuring Rooms
    - Configure Rooms
    - Room Configuration Wizard
    - Configure Room Pricing
    - Configure Override Rooms
    - Configure and Generate Room QR Codes
    - Import Rooms
    - Export Pricing Information for a Room
  - Configure Buildings

    - Configure Building Hours
        - Building Hours Wizard
    - Configure Areas
    - Configure Room Types
    - Configure Setup Types
    - Configure Features
    - Configure Floors
    - Configure Floor Plans
    - Configure Public Views
- Configuration > Resources
    - Categories, Resources, Services - What's the Difference?
    - Configure Resources for a Category
        - Resource Configuration Wizard
    - Import Resources for a Category
    - Define Resource Selections and Selection Items
    - Configure Services for a Category
    - Configure Groupings for a Resource
    - Define Production Areas and Production Items for a Catering Resource
    - Configure Pricing for a Resource in the Edit Pricing Window
    - Export Pricing Information for a Resource
- Configuration > Billing
    - Overview
    - Configure Rate Schedules
    - Configure Pricing Plans
    - Export Pricing Information for Billable Items (Rooms & Resources)

- Configure Calculations
- Configure Accounts
- Configure Payment Types
- Configure Sales Categories
- Configure Billing References and PO Numbers
- Establish Billing Reference and PO Behavior
- Configure Currencies

- Configuration > Administration
  - Overview
  - Configure Categories
    - Enable Visitor Management
  - Configure Departments
  - Configure Statuses
  - Configure Notification Rules
    - Types of Notification Rules
  - Configure Group Notification Rules
  - Configure Check-in Notification Rules
  - Configure Room Card Formats
  - Configure Calendar Formats
  - Configure Reservation Wizard Templates

- Configuration > Other
  - Overview
  - Configure Event Types
  - Configure Group Types
  - Configure Reminder Types

- Configure Comment Types
- Configure Special Dates
- Configure User-Defined Fields
- Configure Reservation Sources
- Configure Cancel Reasons
- Configure Attachment Types
- Configure Word Merge Documents
- Configure Calendar Styles

- Configuration > Everyday User Applications
  - Overview
  - Configure Everyday Users
  - Licensing for Everyday Users
  - Emailing an Everyday User
  - Configure Groups and Contacts from an Everyday User
  - Assign Templates to Everyday Users
  - Configure Everyday User Process Templates
  - Configure Everyday User Security Templates
    - Everyday User Security Template Field Definitions
    - Assign Security Templates to Multiple Everyday Users
  - Configure EMS Web App Menus
  - Configure Intents
  - Configure Help Text
  - Configure Web Text
  - Configure Confirmation Behavior for Everyday User Applications
  - Create Templates for Desks and Workspaces

- Everyday User Process Template Field Definitions
- How Do I Allow Invitations on a Booking Template?

- Configuration > Kiosk
  - Overview
  - Configure Kiosk Profiles
  - Configure Kiosk Menus

- Configure Groups (Toolbar Icon)
  - Overview
  - Configure Groups
    - Configure Additional Information for a Group
    - Edit Group Information
    - Import Groups
  - Configure Contacts

- System Administration > Settings
  - Overview
  - Edit System Parameters
  - Import Registration Information
  - Configure the Confirmation Email Subject Line
  - Reservation Wizard Required Fields
  - Configure Email Settings
  - Set Global Email Preference to SMTP and My Personal Email Preference to Outlook

- System Administration > Security
  - Introduction
  - Overview of User Processes
  - Configure Users

- Configure User Templates
- Configure Academic User Templates
- Configure User Security for Multiple User Accounts

- System Administration > Tools
  - Overview
  - Change Group Wizard
  - Change Reservation Wizard
  - Room Administration Wizard
  - Manage Saved Reports
  - Override Existing Bookings Utility
  - Import Reservations Utility
  - View and Email Logged-In Users
  - Delete Old Data
  - Currency Configuration Wizard
  - Booking Move/Change Status Wizard
  - Video Display Interface
  - Migrate Data

- System Parameters
  - Overview
  - All Applications Parameters
  - EMS Desktop Client Parameters
  - EMS Everyday User Application Parameters
  - EMS Kiosk Parameters

- Import Files to Streamline Data Entry

- Overview
- Special Date Import File Specification
- Room Import File Specification
- Resource Import File Specification
- Group Import File Specification
- Reservation Import File Specification
- Final Exam Schedule Import File Specification

- Video Conferencing
  - Video Conferencing
  - Configure Video Conferencing Capabilities
- Academic Import Utility
- Deployment of EMS Desktop Client
  - Overview
  - Decision Guide: Web Vs Conventional Deployment
  - Web Deployment
  - Conventional Deployment
  - Easy Deployment with Conventional Deployment
  - Enable SSL on Web Deployment
  - Troubleshooting

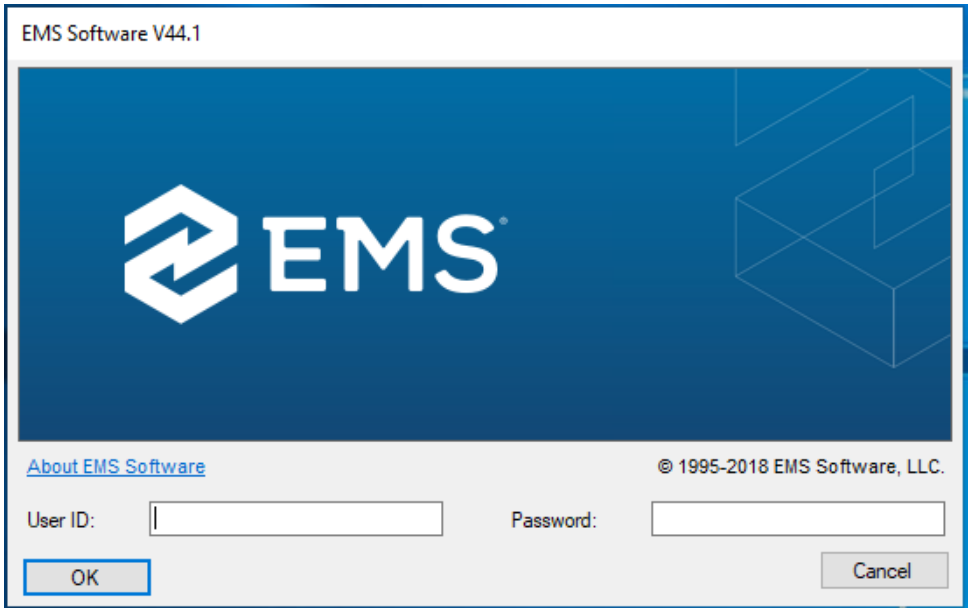
See Also:

- EMS Desktop Client Installation Guide
- EMS Desktop Client User Guide
- Contact Customer Support

CHAPTER 10: Launch EMS

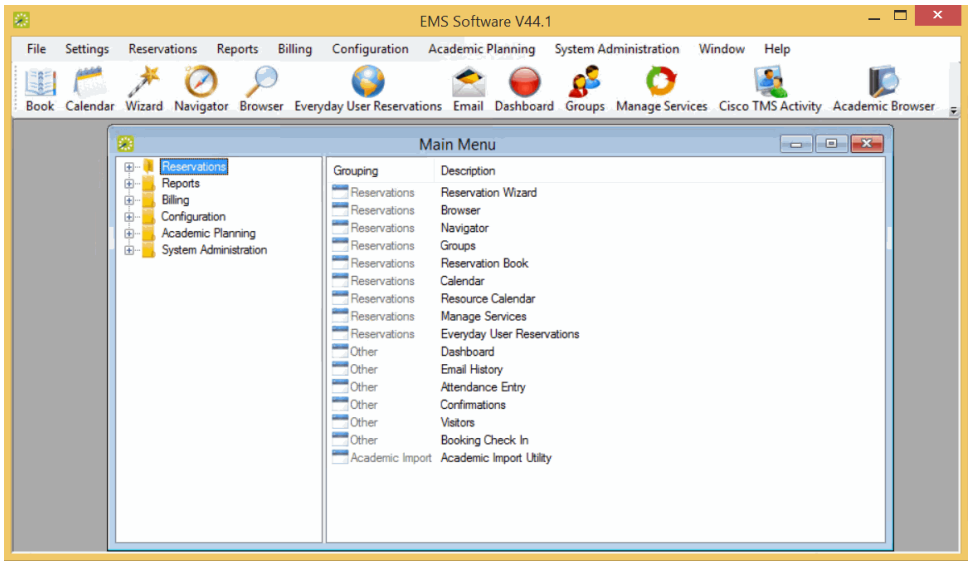
After EMS has been installed on your desktop, a shortcut icon for the application is placed on your desktop. An option for the application is also available from your Start menu. You can double-click the desktop icon to launch the EMS application, or you can select the option from your Start menu.

1. Access the EMS application in either of the following ways:
   - On your desktop, double-click the EMS icon.
   - Open the Windows Start menu, in the Search field, enter EMS and then select the EMS option. If you are the first person to log in to the EMS application at your organization, a dialog box opens where 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.



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.
   - To import the license file, see Import Registration Information.
   - To continue without importing the license file, go to Step 3.
3. Click **OK**. The EMS application opens. The main menu is open in the application.



Main Menu Dialog

Note:

For security reasons, after you log in to EMS the first time using “admin” as both the username and password, at a minimum, we recommend that you change the account password. Ideally, you should create an entirely new administrator account with a new username and password. See Also: Configure Users.

CHAPTER 11: Overview of EMS Desktop Client Configuration

This guide leads you through all aspects of configuring EMS under the assumption that you have installed the application and have Administrator access. For training in initial setup and configuration, please contact EMS Professional Services. Titles of many sections in this Guide refer to menu options from the main menu in EMS Desktop Client.

To enable end-users to make reservations in EMS, at a minimum, you should configure buildings, rooms, statuses, and groups. We recommend that you configure your system in the following phases:

- Facilities
- Resources
- Groups
- Everyday Users
- Billing
- Administration
- Settings
    - Parameters
- Security
- Tools
- Import File Specifications
- Other

CHAPTER 12: Authentication Options for EMS Desktop Client

Authentication is controlled by three factors. They all must be configured correctly for the authentication to work:

1. **Login Credentials:** This is the location where external LDAP/Windows/Portal credentials need to be entered in our software for each user.
2. **Enabled by:** This is either a parameter or checkbox that needs to be enabled for the authentication to work.
3. **Configuration Page:** This is where configuration and options are set for the authentication.

Integrated Windows Authentication

- **Login Credentials:** Network ID field in desktop user account settings (Make sure to include domain, example: "ems\username").
- **Enabled by:** Always enabled unless LDAP is turned on.
- **Configuration Page:** None.

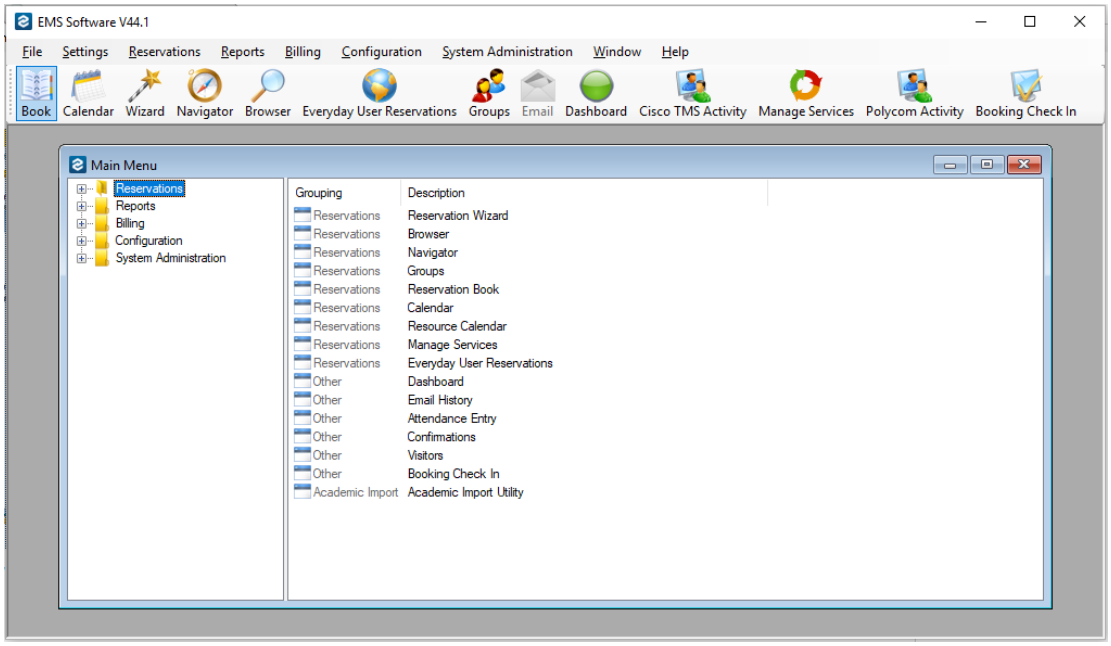
LDAP

- **Login Credentials:** Network ID field in desktop user account settings (external reference doesn't work).
- **Enabled by:** "Use Integrated Authentication Only" EMS parameter set to **Yes**.
- **Configuration Page:** The EMS Desktop Client pulls from the EMS Web App LDAP setup (apconfiguration.aspx page).There are multiple tabs.
- **Other Notes:** An EMS LDAP License is required for this to work. Client machines must have access to the directory server for this to work.

CHAPTER 13: The EMS Main 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 three major components:

1. Menu Bar
2. Toolbar
3. Main Menu



EMS Main Window

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.

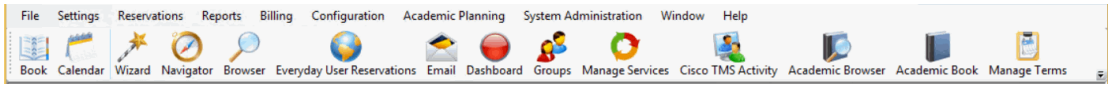


Note:

To see which database your application is pointing towards, click **File** > **Change Database**.

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, Everyday User 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. The example below shows some customized buttons.

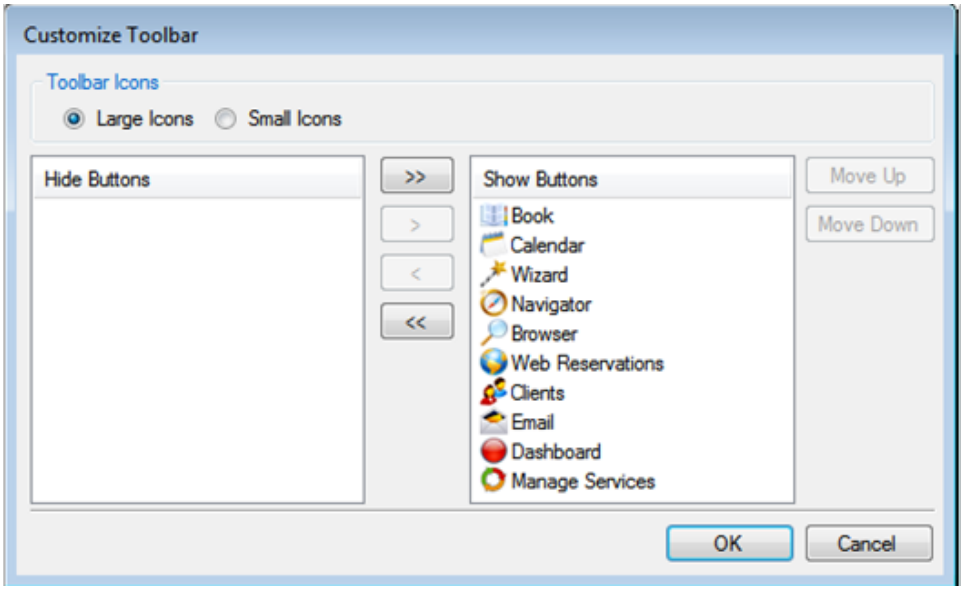


Note:
Additional buttons can be viewed by clicking the drop-down arrow in the lower right corner of the toolbar.

Customize the Toolbar

To customize the EMS toolbar, follow these steps:

1. Right-click the toolbar and click **Customize**. The Customize Toolbar dialog box opens.



Customize Toolbar Dialog Box

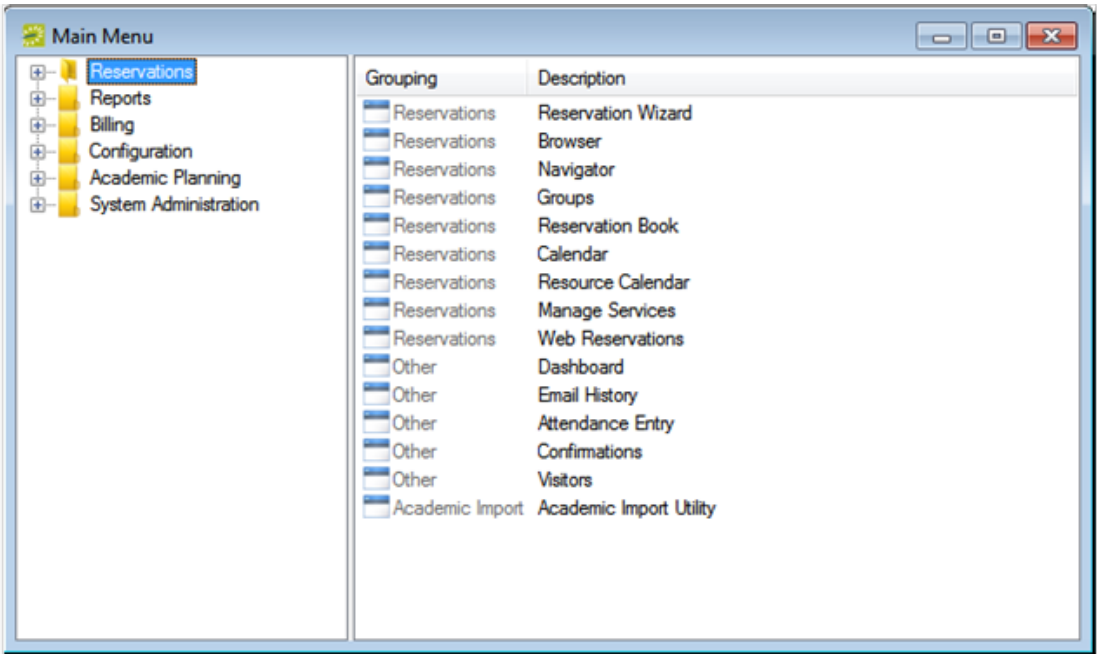
2. You can adjust your toolbar appearance as follows:
   - To display the toolbar icons as large icons, select **Large Icons**; otherwise, click **Small Icons**.
   - To hide an icon from the toolbar display, in the Show Buttons panel, select an icon (CTRL-click to select multiple icons), and then Hide (<). Conversely, to show an icon on the toolbar display, in the Hide Buttons panel, select an icon, and then Show (>).
   - To change the order (from left to right) in which the icons display on the toolbar, select the icon, and then **Move Up** or **Move Down** as needed.

> **Note:**
> 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 (>>)

3. Click **OK**. The Customize Toolbar dialog box closes and your toolbar is updated to reflect your changes.

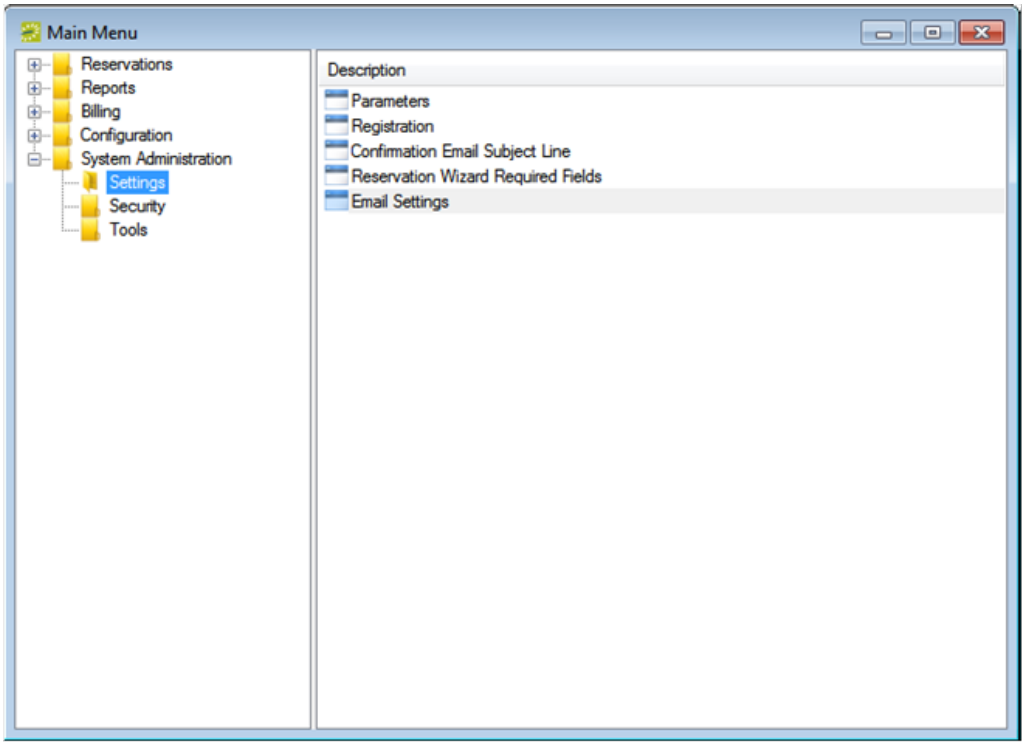
Main Menu

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



EMS Main Window

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.



EMS Main Menu Folder Structure

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

CHAPTER 14: The 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:

- The **click and drag** feature enables you use to group data by a specific column, rearrange the order of the data columns, or change the width of a column. 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.
- A **filtering** feature that you can use to find and work with a subset of data in the window.
- A **column sorting** feature that you can use to sort data by a specific column.

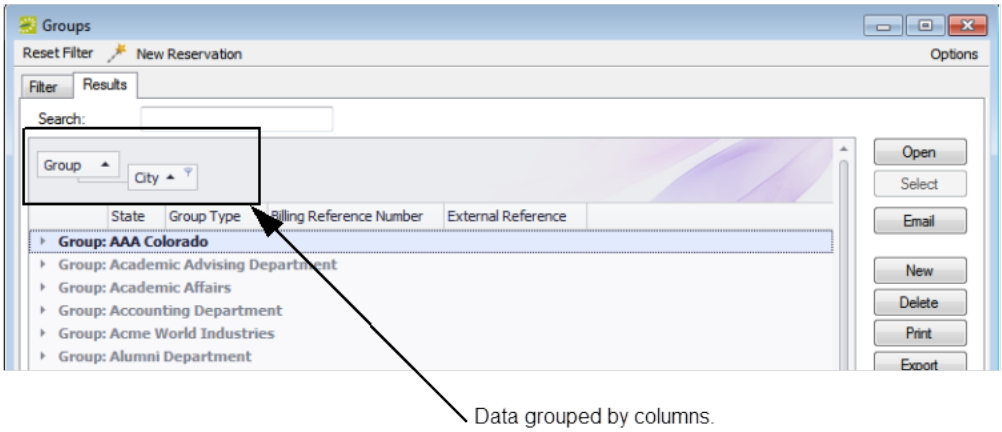
This topic provides information on the following:

- Group Data by Columns
- Rearrange Columns
- Change Column Width
- Use the Context Menu
- Filter Data
- Change the Sort Order of Data

Note:
These procedures are explained using the Groups window; however, the instructions are applicable for any Browser window in EMS.

Group Data by Columns

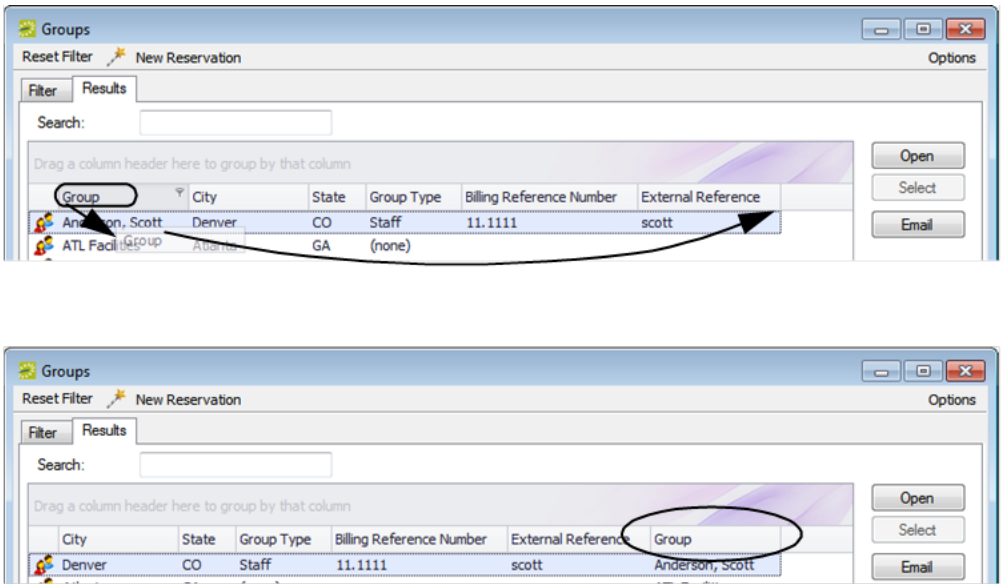
In any browser window, you can drag a column header to the indicated location and group the data by the selected column. You can drag multiple column headers to the location. If you sort data by multiple columns, then the first column is the parent column. All other columns are placed as child columns,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



Data Grouped by Columns

Rearrange Columns

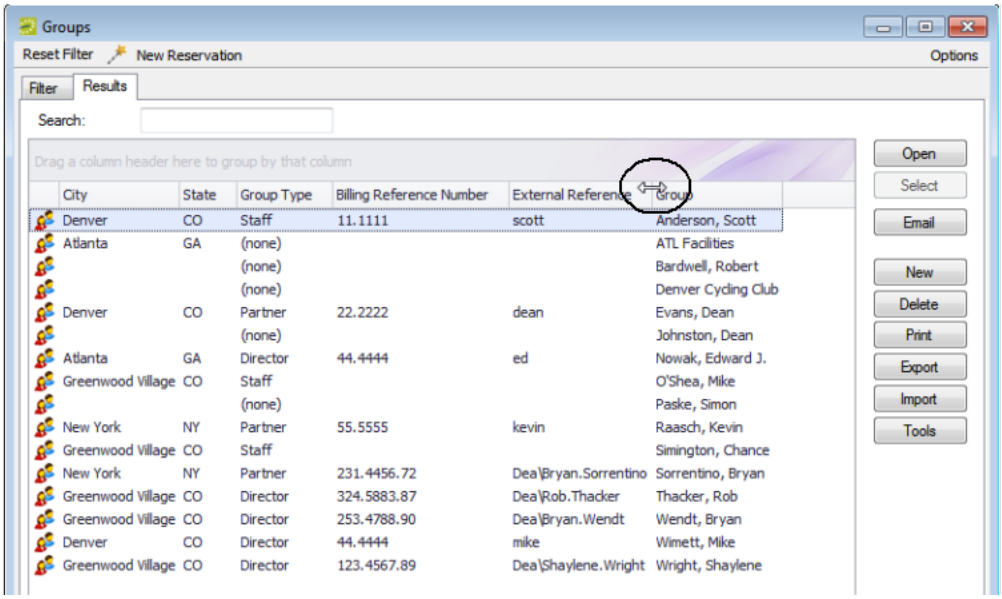
You can rearrange column order by dragging a column to a new location using the column heading.



Drag Column to Rearrange

Change Column Width

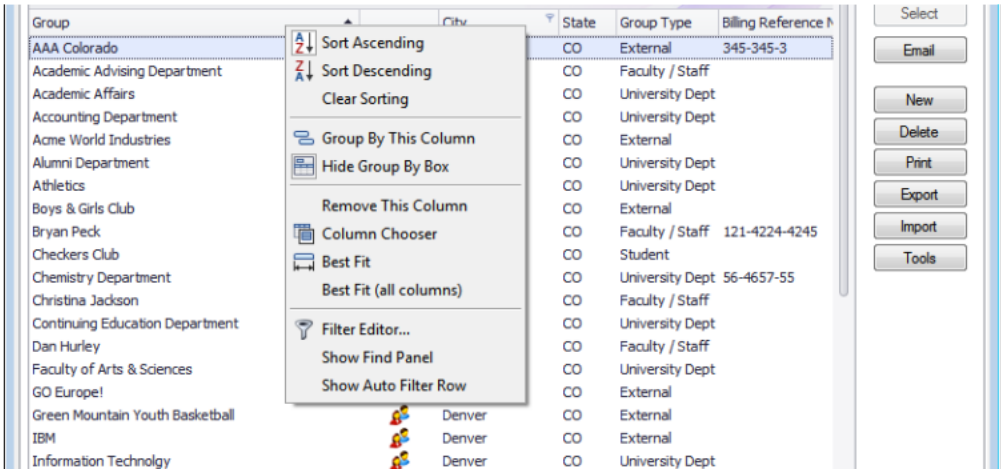
You can change column width by resting the mouse pointer on the right side of a column heading until the pointer changes to a double-headed arrow, and then dragging the boundary.



Change Column Width

Use the Context Menu

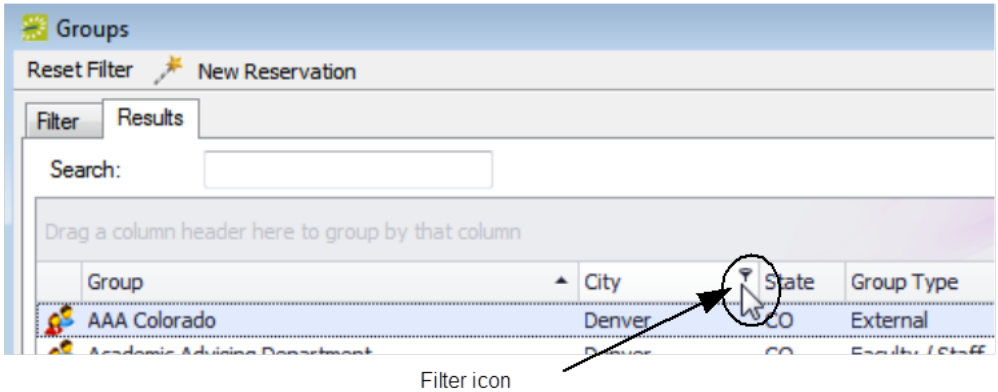
Right-click in any column in a browser window to open a context menu that has a multitude of options for sorting data, grouping data, sizing columns, and so on.



Right-Click Column to Open Context Menu

Filter Data

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



Filter icon

Filter Icon

> **Note:**
> Any filter you create is always displayed in the bottom left corner of the 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	A Filter list also displays each unique value that has been entered for the field.

Option	Description
Value>	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. To edit the current filter, you can click **Edit Filter** in the lower right corner to open the Filter Editor dialog box.
    - To add a new condition to a filter, click **Add/Insert**.
    - To remove a condition from a filter, click **Delete** 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**.

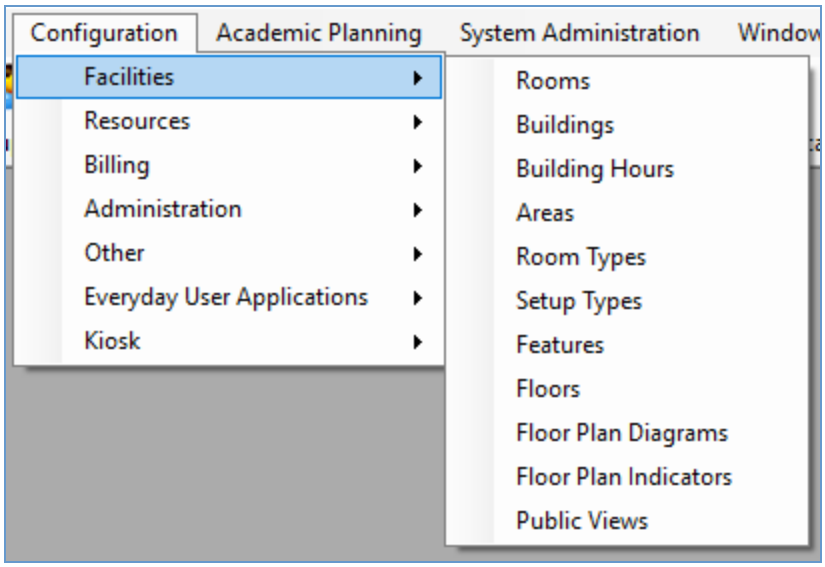
Change the Sort Order of Data

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; an "up" arrow indicates that data is sorted in ascending order.
2. Click the up arrow to sort data in descending order.
3. Click the down arrow to sort data in ascending order.

CHAPTER 15: Configuration > Facilities

Before you can use EMS to manage your organization's events, you must configure core facilities that are specific to your organization. For example, before you can reserve a room, you must first configure the room. This menu is available on the EMS Desktop Client top menu bar under **Configuration**>**Facilities**.



Facilities Drop-Down Menu

> **Note:**
> Floor Plan Diagrams and Floor Plan Indicators are optional features used when your organization has the optional add-on, EMS Floor Plans.

This section will include information on the following:

- Overview of Configuring Rooms
  - Configure Rooms
  - Room Configuration Wizard
  - Configure Room Pricing
  - Configure Override Rooms
  - Configure and Generate Room QR Codes
  - Import Rooms
  - Export Pricing Information for a Room
- Configure Buildings

- Configure Building Hours
  - Building Hours Wizard
- Configure Areas
- Configure Room Types
- Configure Setup Types
- Configure Features
- Configure Floors
- Configure Floor Plans
  - Floor Plan Diagrams
  - Floor Plan Indicators
- Configure Public Views

Note:

If your organization has purchased and installed EMS Desktop Client — Academic Planning, 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 the EMS Desktop Client — Academic Planning Configuration Guide.

CHAPTER 16: Overview of Configuring Rooms

A **room** is a physical location that you reserve for an event. You can configure any physical location or space (e.g., meeting room, athletic field, lobby, etc.), as a room. Examples of rooms:

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

EMS uses three classifications of rooms:

1. Standard Rooms
2. Combination Rooms
3. Override Rooms

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 (e.g., menus, window and dialog box titles, confirmation headings, etc.), you must change the values for the Room Title Plural and Room Title Singular parameters. **See Also:** System Parameters.

Standard and Combination Rooms

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, regardless of 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. The table below summarizes this example.

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.

Override Rooms

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."

CHAPTER 17: Configure Rooms

By defining rooms in your organization, you enable Everyday Users to choose from a list of rooms that they can intuitively filter by many elements, such as name, location, type, setup, available services, and physical features.

> **Note:**
> The Room Configuration Wizard is ideal for configuring multiple rooms at once, when they should have the same configuration: room type, setup hours, teardown hours, features, and setup type. For instructions on using the wizard, first familiarize yourself with the general process of defining rooms in this topic. **See Also:** Room Configuration Wizard.

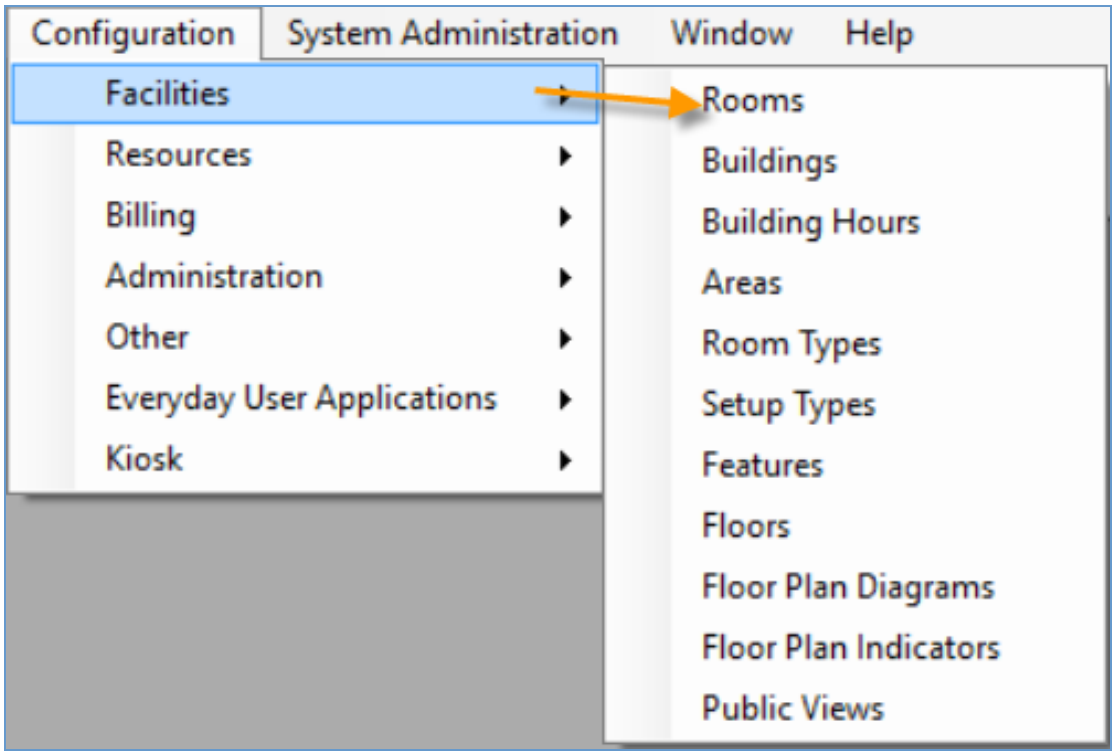
To configure a room, you will

- Check if the room has already been configured.
- Edit an existing room to add more detail, or configure a new one from scratch.
- Define the room in detail by going through the tabs along the top of the Room configuration page.
- *Optional:* You can specify the pricing for the room during this process, or you can price it a later date.

This topic includes information on the following:

- Basic Elements for Configuring a Room
- Notes or Alerts for a Room
- Google Integration
- Configure Calculations for a Room
- Configure Pricing for a Room
- Set Setup Types for a Room
- Set Components for a Combination Room
- Set Features for a Room
- Exclude Resources for a Room
- Add Attachments to a Room
- Add an Image for a Room
- Add Drawings for a Room
- Configure TBD Rooms
- Set Values for User Defined Fields (UDFs) for a Room
- Assign the Room to an Everyday User Process Templates

This topic guides you in configuring a single room; once you have configured everything else under the **Configuration** > **Facilities** menu, room configuration is where "everything comes together," since defining a room entails all these elements.

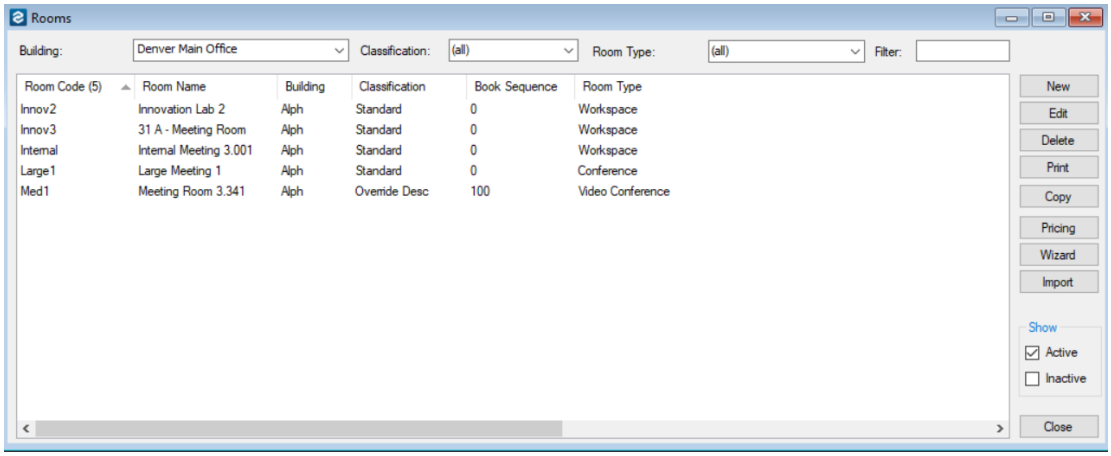


Navigate to Rooms in Facilities Drop-Down Menu

Basic Elements for Configuring a Room

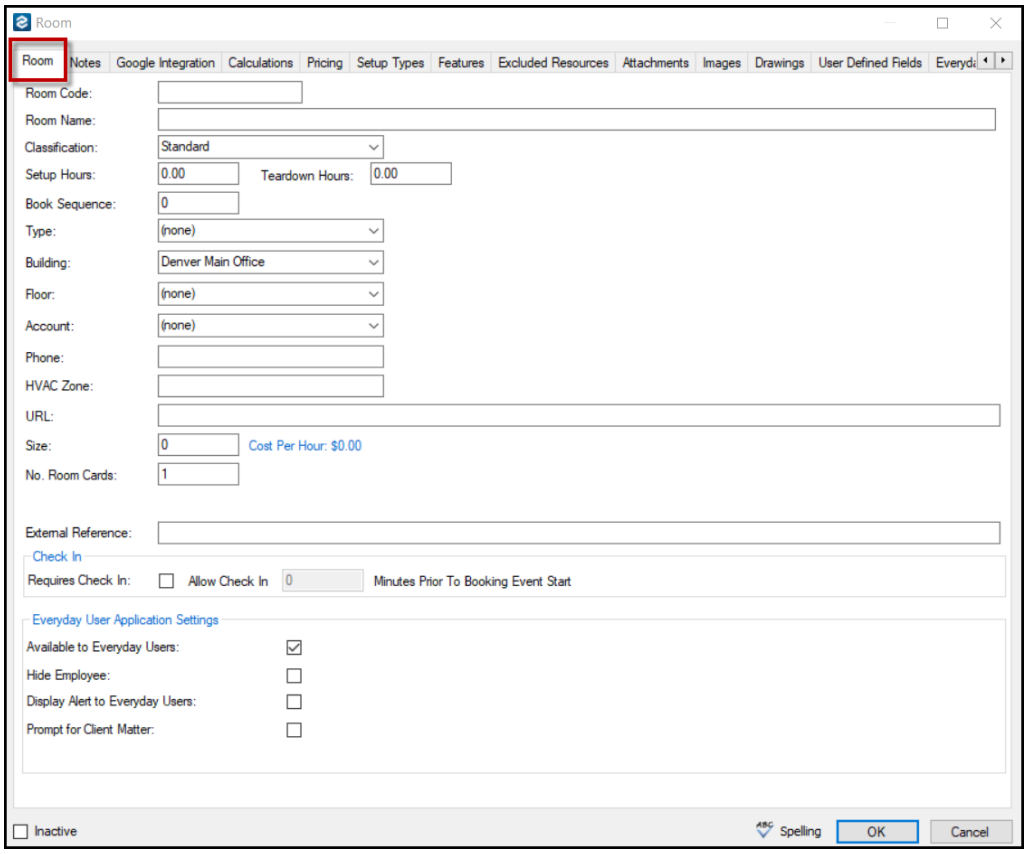
At a minimum, you must specify the room code, the room name, the room classification, and the Building that contains the room. All other information is optional, and you can configure it at a later date if needed.

1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms configuration page opens.



Rooms Configuration Page

2. In the fields along the top, enter any of the following criteria to narrow the list of rooms below or to set basic information for a new room configuration:
   - **Building**
   - **Classification:** Leave the default value of (all), or select a specific room classification.
   - **Room Type:** Leave the default value of (all), or select a specific room type.
   - **Filter:** Keyword search (case sensitive, characters must be in correct order).
3. You can perform the following tasks by clicking the buttons on the right-hand side of the Room Configuration page:
   - **New:** Create a new room from scratch.
   - **Edit:** Modifies an existing room.
   - **Delete:** Delete an existing room.
   - **Print**
   - **Copy:** Use an existing room to facilitate configuring a new room.
   - **Pricing:** Specify the pricing for the room or you can price it a later date.
   - **Wizard:** Opens the Room Configuration Wizard, ideal for configuring multiple rooms simultaneously.
   - **Import:** Import rooms from a tab-delimited file into a building, area, or view that you select. See Also: Import Rooms.
4. From the **Room** tab, enter the information for the new room.



Room Tab

Fields on Room Tab

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.

Field	Description
	Note: The room name can be a maximum of 50 characters, including spaces.
Classification	Select the appropriate classification for the room.
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 the user specifies in the Reservation Wizard or in EMS Web App. A user can override these 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. 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 zero for all rooms, then rooms are sorted numerically by room code, and then alphabetically.
Type	Room type. Leave the default as (none), or select a room type from the list. **Note:** If the appropriate room type is not listed, you can configure it.
Building	**REQUIRED** field. If you selected a single Building when setting criteria, this field carries over that value. You can change it.
Floor	Leave the default as (none), or select a floor from the list.
Account	Enter the internal account that should be credited with the room rental revenue.

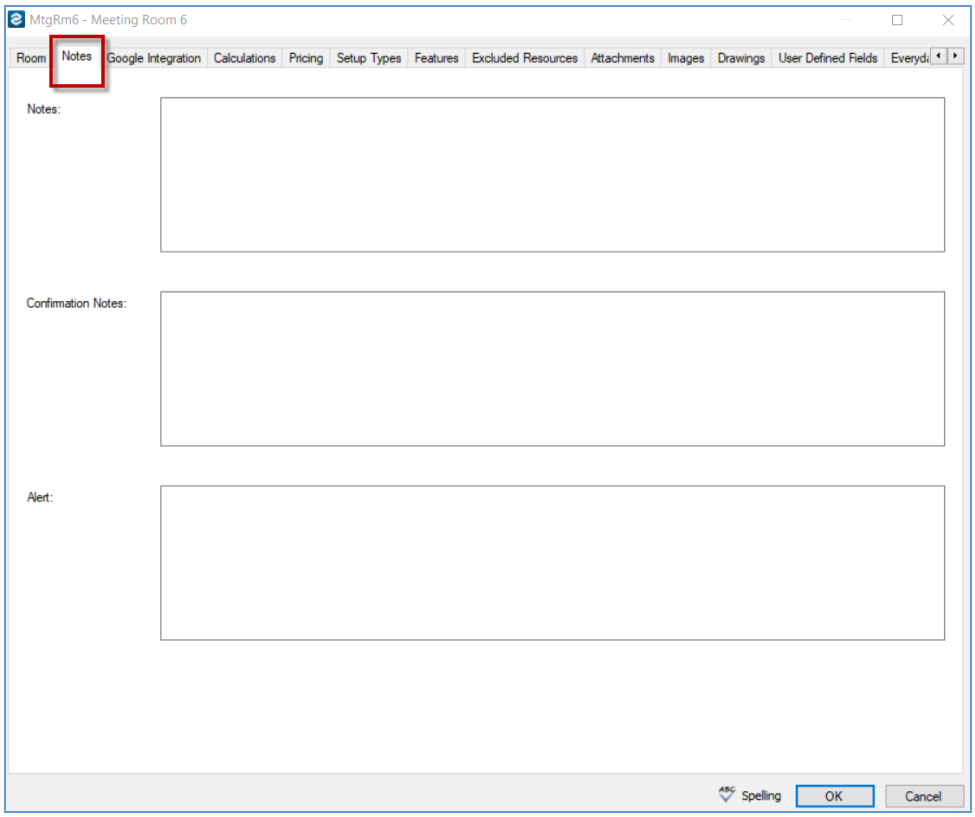
Field	Description
	Note: If the appropriate account is not listed, you can configure it.
Phone	The phone number associated with the room.
HVAC Zone	Optional field used for integration with an HVAC system.
URL	The URL (website address) for a web page that provides more information about the room.
Size	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. **Note:** This controls whether you can generate QR codes for this room.
Academic	Available only in EMS Desktop Client -- Academic Planning. Set an academic property on the room.
External Reference	Links the room to an outside program, if needed.
Requires Check In	Requires bookings within this room to be checked-in to beginning at a certain number of minutes prior to the Booking Start Time. **See Also:** Enable Booking Check In.
Allow Check In	You can choose the time you allow users to check into their booking prior to the event start time. You can leave this as 0 or enter a number of minutes. This field is not available unless you check Require Check In (see above).
Minutes Prior to Booking Event Start	This values determines how far in advance Everyday Users can check into their meetings.

Field	Description
Everyday User Application Settings	
Available to Everyday Users	Leave this option selected if events that are scheduled in the room are to be displayed to all Everyday Users. **Note:** For a booking to appear on Browse Events, the event type, status and room for that booking all have to have Display to Everyday User (DEDU) settings enabled. If one of these properties is not DEDU-enabled, the booking will not appear on Browse Events in the EMS Web App.
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 to Everyday Users	Select this option to display any alerts that have been configured for the room when an Everyday User schedules an event in the room.
Prompt for Billing Reference	Users will see the Billing Reference field during the booking process when this parameter is set at either the reservation, room, or category level. Concept: Billing Reference Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the Admin decides whether to display the field, user entries will be validated based on the value in the 'Billing Reference Validation' parameter set on the template. **See Also:** Establish Billing Reference and PO Number Field Behavior.
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 see Configure Room Types. Otherwise, continue to the sub-sequent procedures in this topic.
6. Click **OK**. The Room configuration page closes and the newly configured room is listed.

Notes or Alerts for a Room

1. From the Room Configuration Page, open the **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.
Confirmation Notes	These notes are included in any confirmations that are printed for events that are scheduled in the room.

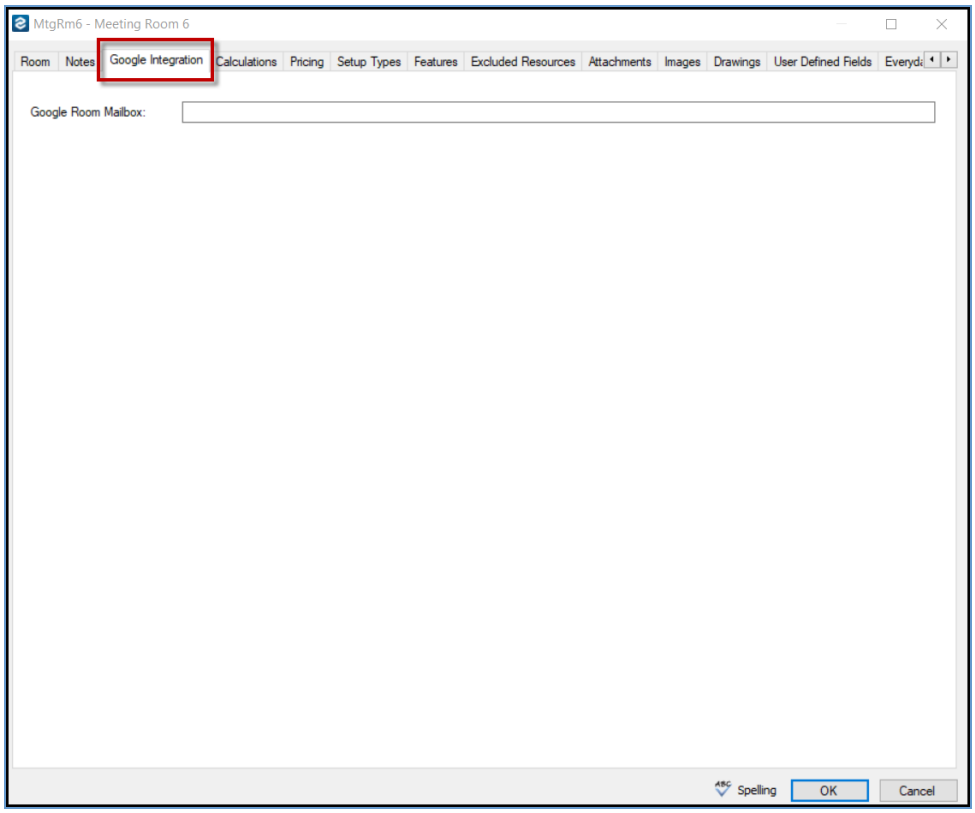
Option	DESCRIPTION
Alert	Free form text that provides any additional information or description about the room. This text is displayed when an EMS user schedules an event in the room, and if Display Alert to Everyday Users is selected for the room, when an Everyday User schedules an event in the room as well.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room Configuration page. The newly configured room is displayed in the list of rooms.

Google Integration

This tab allows you to configure a room for EMS for Google Calendar.

1. Enter the **Google Room Mailbox** that has been associated with this room.



2. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room Configuration page. The newly configured room is displayed in the list of rooms

Configure Calculations for a Room

1. From the Room Configuration page, click on the **Calculations** tab to link pre-defined calculations to the room so they are always included in billings for it. **See Also:** Configure Calculations.
2. Select the calculation(s) you want to link to the room in the Available list and use the arrow keys (>, <) to move to the Selected list.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room Configuration page. The newly configured room is displayed in the list of rooms

Configure Pricing for a Room

> **Note:**
> You can also configure the room price on the Edit Pricing window. **See Also:** Configure Room Pricing and Configure Rate Schedules.

1. From the Room Configuration page, open the **Pricing** tab to link the room to pre-defined pricing methods so these are used for billing.
2. For each **Rate Schedule**, select the Pricing method, which determines the cost for reserving the room. If the appropriate rate schedule is not listed, you can configure it.

Pricing Methods

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.
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.

Pricing Method	DESCRIPTION
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**, edit the amounts in the fields below as needed.

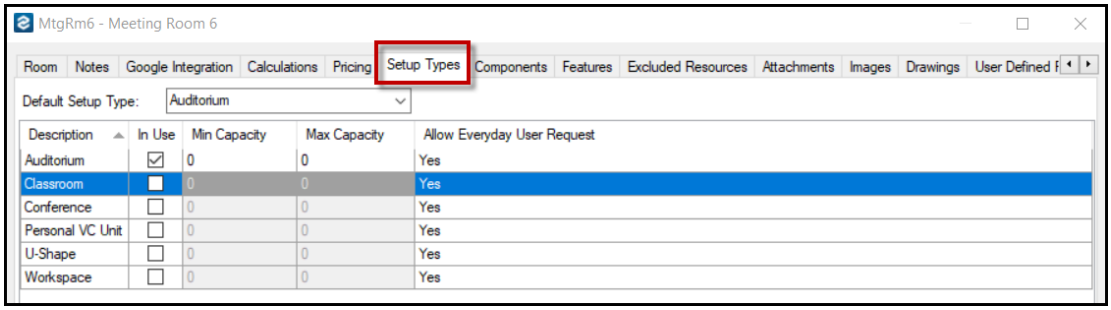
Field	Description
Price	The dollar amount that is used in calculating the room price for a booking. If the pricing method is Unit, then this value is applied in total to a room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If 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).

Field	Description
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 Configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Set Setup Types for a Room

1. From the Room Configuration page, open the **Setup Types** tab and link pre-defined setup types to the room.



Setup Types Tab

2. For each setup type you want to apply for the room, select **In Use**, and use the Min Capacity and/or Max. Capacity fields to set headcount limits. If the appropriate setup type is not listed, you can configure it.

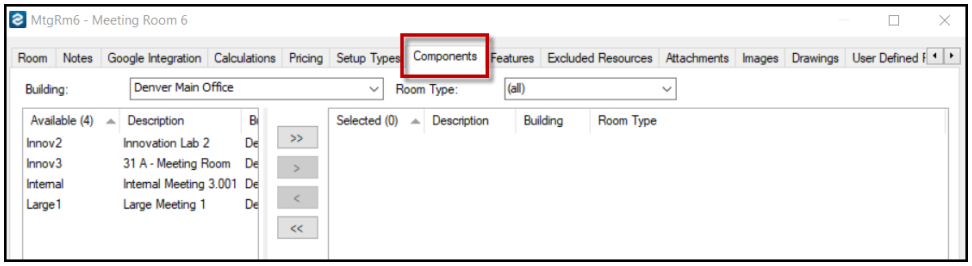
> **Note:**
> If Everyday Users are able to request a setup type for the room, the **Allow Everyday User Request** option will be set to **Yes**. This is controlled by your Setup Type Configuration.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page.

Set Components for a Combination Room

> **Note:**
> This tab is available only if you selected Combo for the room classification.

1. From the Room Configuration page, open the **Components** tab.



Components Tab

2. Do one or both of the following:
   - On the **Building** drop-down 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 listed, you can configure it.
   - On the **Room Type** drop-down list, leave the default value of (all), or select a specific room type. If the appropriate room type is not listed, you can configure it. As you select your search criteria, the list of rooms dynamically updates.
3. On the Available list, CTRL-click to select multiple rooms that will comprise the Combo room, and then Move (>) to them to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Set Features for a Room

1. From the Room Configuration page, open the **Features** tab.
2. On the Available list, select the Feature (CTRL-click to select multiple features) and Move (>) to the Selected list. If the appropriate feature is not listed, you can configure it. See Configure Features.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Exclude Resources for a Room

This setting prevents EMS Web App users from selecting a resource from a room. EMS Desktop Client users just receive a warning, but they can still select the resources for the room.

1. From the Room configuration page, open the **Excluded Resources** tab.
2. On the Category drop-down 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 Also:** Configure Categories and Configuring Resources for a Category.
3. Select the resource (use CTRL-click to select multiple resources) to exclude from the room, and Move (>) to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

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. Users can see the attachments when they are viewing details about the room.

1. From the Room configuration page, open the **Attachments** tab.
2. Click **New** to open the Find Attachment dialog box, and then browse to find and select the attachment. The Find Attachment dialog box closes. Your attachment displays 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.
   - You can view an attachment: select the attachment, and then click **View**. Your EMS Desktop Client must have a software program installed to view the attachment. For example, to view a Microsoft Excel spreadsheet, you must have Microsoft Excel installed on your EMS Desktop Client.

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

Add an Image for a Room

> **Note:**
> Images are displayed as thumbnails in both EMS and EMS Web App 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. From the Room configuration page, open the **Images** tab.
2. Click **New** to open the Find Image dialog box, and browse for your image file. Once you have chosen on an image, it will be listed on the Images tab.

> **Note:**
> You can use the **Web App Long Description** field to enter a description of the image that will display on the EMS Web App.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page.

Add Drawings for a Room

A *drawing* is 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 EMS Web App when making a Reservation, then you should associate the image with the room on the Images tab.

1. From the Room Configuration page, open the **Drawings** tab.
2. Click **Attach** to open the Find Drawing dialog box, and then browse for your drawing file. Once you have chosen the file, the drawing is displayed on the Drawing tab.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Set Values for User Defined Fields (UDFs) for a Room

1. From the Room Configuration page, open the **User Defined Fields** tab to add pre-defined fields to the room that will be used during the booking process.
2. For each UDF defined for the room, select the UDF, and then click **Set Value**.
3. A Value dialog box will appear. Insert the Value and click OK.
4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room Configuration page.

Assign the Room to an Everyday User Process Templates

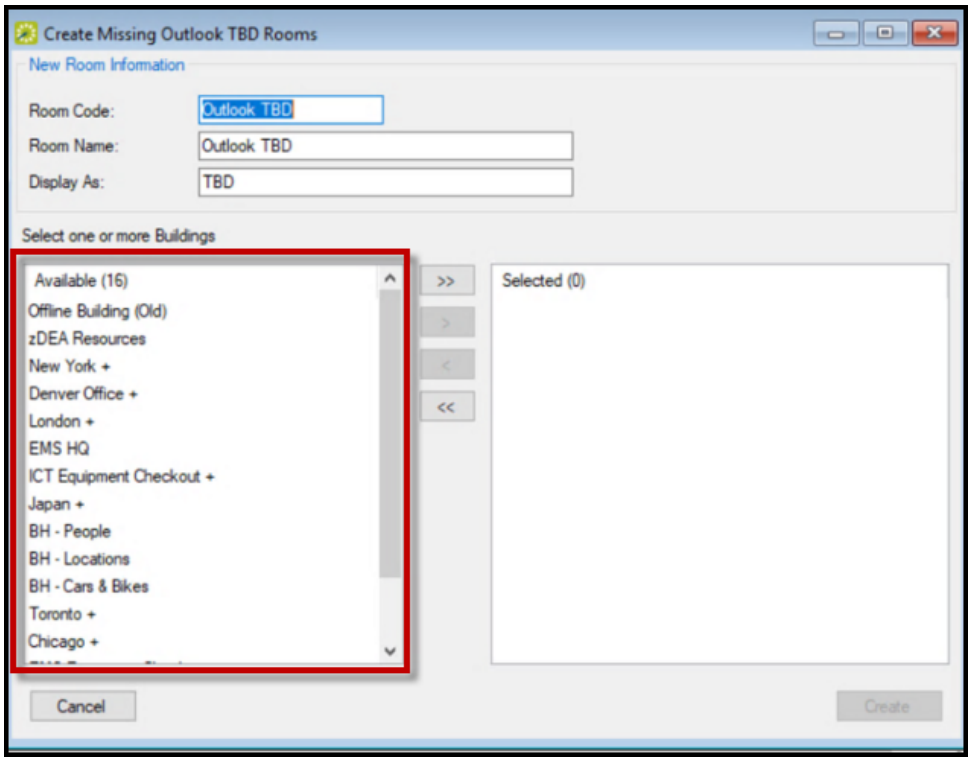
By assigning a room to an Everyday User process template, you enable these users to select it from Everyday Applications such as EMS Web App and EMS Mobile App when they book events using the template. To learn more, **See Also:** Configure Everyday Users.

1. From the Room Configuration page, open the **Everyday User Process Template** tab.
2. On the Available list, select the everyday user template (CTRL-click to select multiple templates) for which the attached users can book the room, and then Move (>) them to the correct Selected list.
   - Move templates for which users can reserve the room without approval (booked into the Reserve status in EMS Web App) into the Reserve pane.
   - Move templates for which users must get approval to reserve the room (booked into the Request status in EMS Web App) into the Request pane.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Configure Outlook TBD Rooms

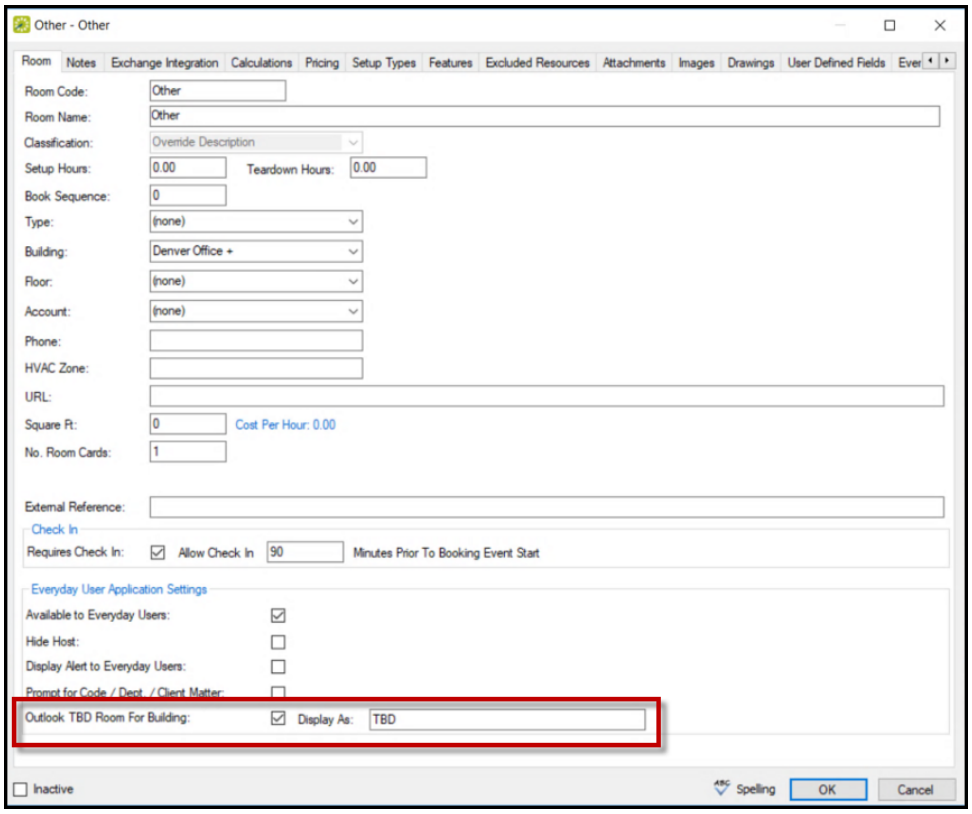
EMS Software recommends that you define an "Outlook TBD" room for each building in your database. This will ensure skipped bookings in EMS for Outlook remain in the correct timezone and will allow for localized notifications and reports to be created around meetings without locations. **See Also:** Resolve Booking Conflicts in EMS for Outlook.

1. On the EMS Desktop Client menu bar, click **System Administration** > **Tools** > **Create Missing Outlook TBD Rooms**. The Create Missing Outlook TBD Rooms dialog box will open.



Create Missing Outlook TBD Rooms Dialog

2. Select one or more Buildings you want to create a TBD room for.
3. Click **Create**. A TBD room will now be available in your list of rooms for the selected Buildings. The TBD room will automatically appear as an Outlook TBD Room for Building in your Room Configuration page. Optionally, you can set a **Display As** name for your Everyday Users.



Set Display As Name for Everyday Users

CHAPTER 18: Room Configuration Wizard

The Room Configuration Wizard enables you to configure multiple rooms at one time. These rooms should have the following properties in common:

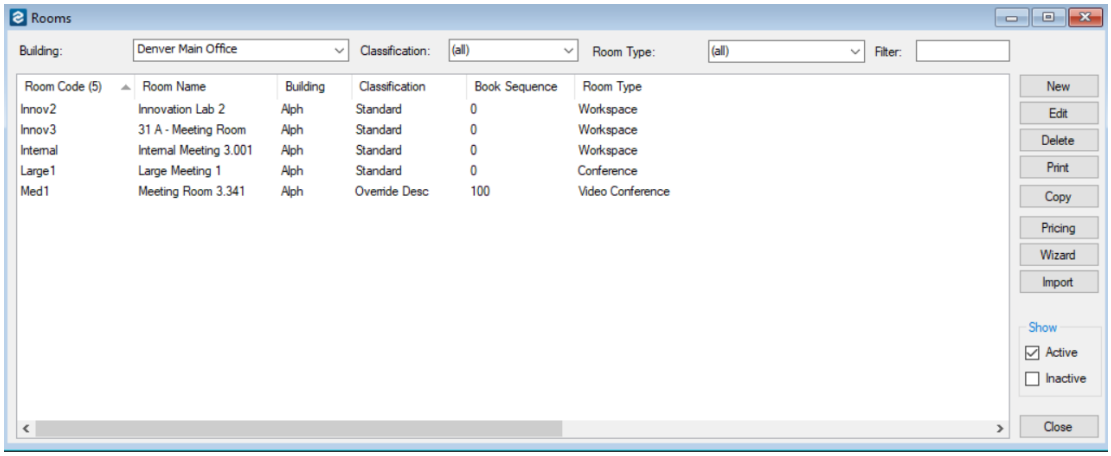
- Room type
- **Setup hours**[1]
- **Teardown hours**[2]
- Features
- Setup types

This topic provides information on the following:

- Using the Room Configuration Wizard
- Configure Features for Multiple Rooms
- Exclude Resources for Multiple Rooms
- Configure Common Setup Types for Multiple Rooms
- Configure Common UDFs for Multiple Rooms

Using the Room Configuration Wizard

1. On the EMS menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms window opens.



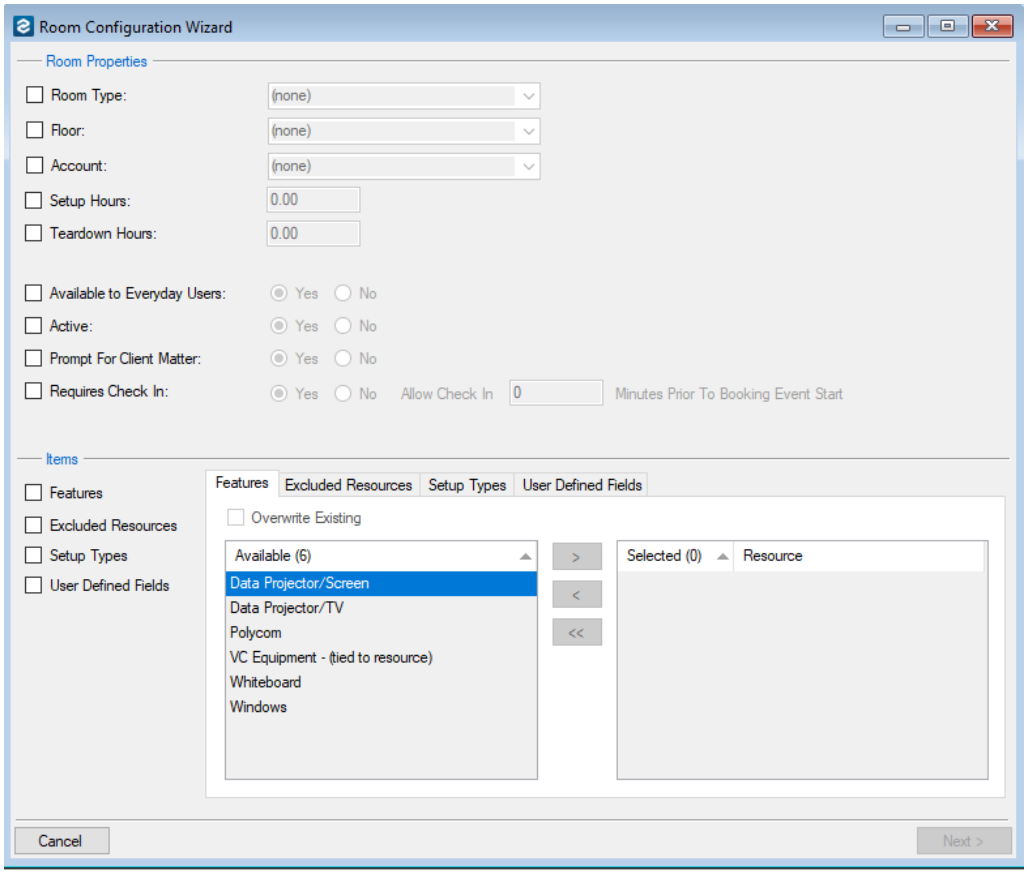
Rooms Window

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[1]Setup hours are the time spent by staff preparing a room for an event.

[2]Teardown hours are time spent cleaning up after an event.

2. Click **Wizard**. The Room Configuration Wizard opens, with **Features** tab (in the Items pane) active.



Room Configuration Wizard

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

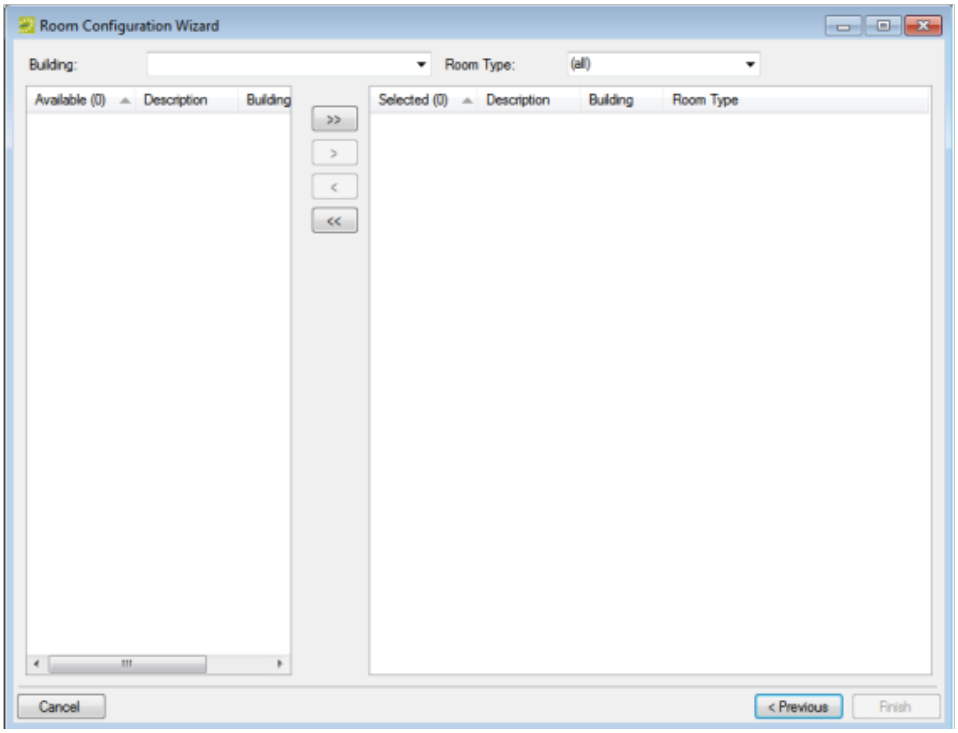
Room Properties

Option	Comment
Room Type	If the appropriate room type is not listed, you can configure it.
Floor	If the appropriate floor is not listed, you can configure it.
Account	If the appropriate account is not listed, you can configure it.
Default	If the appropriate setup type is not listed, you can configure it.

Option	Comment
Setup Type	**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 EMS Web App. A user can override these default values in the Reservation Wizard.
Available to Everyday Users	Select if events that are scheduled in the room are to be displayed in EMS Web App.
Active	Select either Yes or No to activate or inactivate a room.
Prompt for Billing Reference	Select to prompt for a billing reference when a room is selected for a booking.
Requires Check In	Requires bookings within this room to be checked-in to beginning at a certain number of minutes prior to the Booking Start Time.

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

4. If you want the events scheduled in the room to display in EMS Web App, select **Available to Everyday Users**.
5. If these rooms are to be active (available immediately for booking events), select **Active**. (**Yes** is selected by default.) Otherwise, select **No**.
6. Click **Next**. The Room Configuration Wizard presents so you can search for the rooms you want to configure.

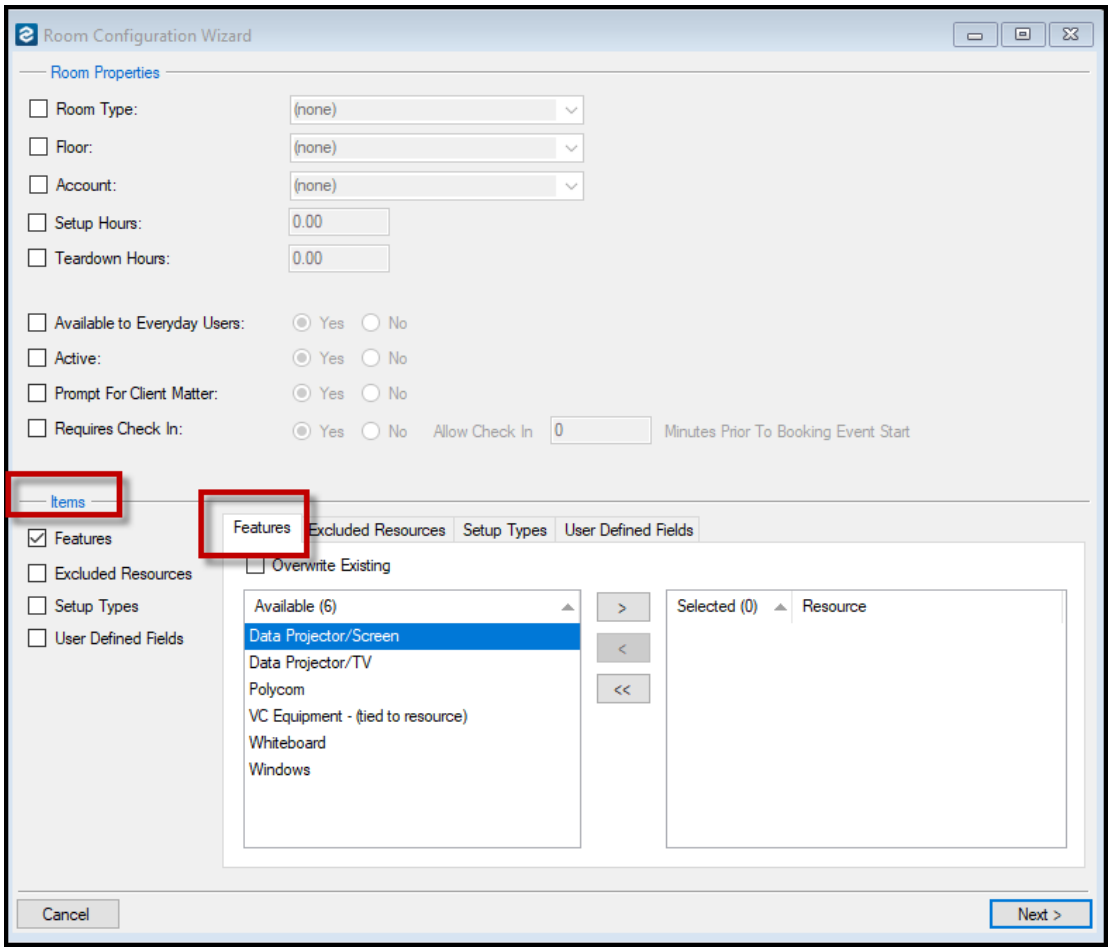


Room Configuration Wizard

7. Enter any combination of search criteria, by Building and Room Type.
8. On the Available list, select the room (CTRL-click to select multiple rooms) to be configured, and then Move (>) to the Selected list.
9. Click **Finish**. The Room Configuration Wizard closes. A message opens indicating that the room properties were set successfully.
10. Click **OK**. The message closes. You return to the Rooms window. The newly configured rooms are displayed in the window.

Configure Features for Multiple Rooms

1. From the Room Configuration Wizard screen, under **Items**, select **Features**. From here, you can select Features for rooms that should all have the same features.



2. On the Available list, select the feature (CTRL-click to select multiple features) you want the rooms to have. If the appropriate features are not available, you can configure them. See Also: Configuring Features.
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, click the **Overwrite Existing** checkbox; otherwise, the new features are 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.

Exclude Resources for Multiple Rooms

1. From the Room Configuration Wizard screen, under **Items**, select the **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.
3. On the Available list, CTRL-click to select multiple resources you want excluded from the rooms.

4. If any of the rooms you select for configuration have existing resources and you want to drop these existing resources and apply only the new resources, select the **Overwrite Existing** checkbox; 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.

Configure Common Setup Types for Multiple Rooms

1. From the Room Configuration Wizard screen, under **Items**, select **Setup Types**.
2. If any of the rooms you select for configuration have existing setup types and you want to drop them and apply only the new setup types, select the **Overwrite Existing Setup Types and Capacities** checkbox; 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 use the Min. Capacity and/or Max. Capacity fields to set headcount limits 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.

Configure Common UDFs for Multiple Rooms

1. From the Room Configuration Wizard screen, under **Items**, select **User Defined Fields**. All UDFs that have a type of Room are displayed on the tab.
2. If any of the rooms you select for configuration have existing UDFs with set values and you want to drop them 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 you configure for the room, do the following:
   a. 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.
   b. Click **Clear Value** to clear the value associated with the UDF.
4. Continue with any other optional configuration for the room as needed; otherwise, click **Next** to continue in the Room Configuration wizard.

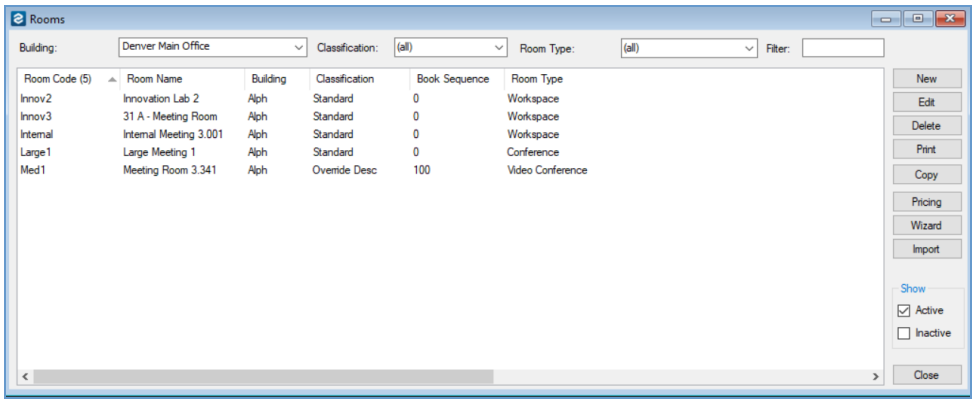
CHAPTER 19: Configure Room Pricing

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 (as described in this topic).

> **Note:**
> You can also configure the room price at the time that you are configuring the room on the Room dialog box (see Configure Rooms), or when you are configuring rate schedules (see Configure Rate Schedules).

To configure the pricing for a room on the Edit Pricing window, complete the following steps:

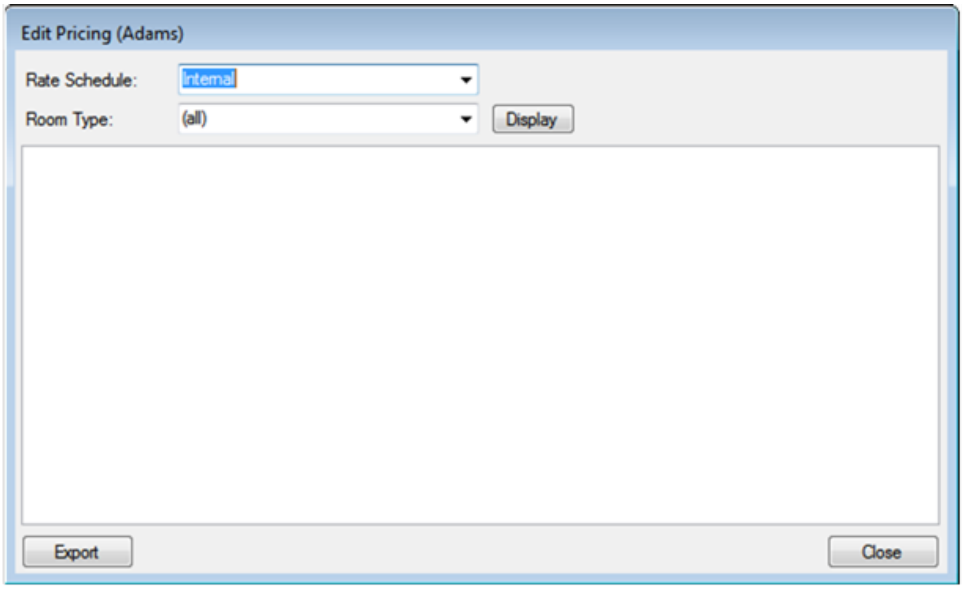
1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms window opens. See Also: Configure Pricing for a Room on the Pricing Tab.



Rooms Window

2. From the Building drop-down list, select the Building, Area, or View that contains the rooms that you are pricing.

3. Select a Room and click **Pricing**. The Edit Pricing window opens.



Edit Pricing Window

4. On the **Rate Schedule** drop-down list, select the rate schedule for which you are pricing the rooms.
5. You can 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 drop-down list, you can select a specific room type, and then click **Display** for a list of all active rooms of the selected room type.
6. For each room, select the pricing method, which determines the cost for reserving the room, using the field definitions below.

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.
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

Field	Description
	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).
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 above steps 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.

CHAPTER 20: Configure Override Rooms

An **override room** is used in EMS to loosely define useable space which is not formally configured.

For example, a building can have private offices which are not configured as spaces available for public use, but you might need to select such a space for an attendee who is participating remotely in a video conference. In order to provide company employees the ability to schedule meetings in these private rooms, Override Rooms can be configured in EMS. **See Also:** Specify Unregistered Attendee/Visitor Behavior.

Create an Override Room

1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms Configuration page opens.
2. Click New.
3. In the Room Name field, enter a name for the space in a way that indicates an Override Room (for example, "Override Area 1").
4. Under Classification, select "Override Description" from the dropdown.

In the example above, "Override Area 1" can be used repeatedly to serve as a placeholder for any meeting request which will occur in an un-configured space.

For example, on Monday a user makes a reservation for "Override Area 1" and names it "Meeting in Mike Thompson's Office", and on Wednesday another user makes a reservation for "Override Area 1" and names it "Meet Guests in Lobby Reception Area Prior to Building Tour."

EMS does not track availability for events booked in Override Rooms; however, EMS reports on events that are scheduled in an override room as it would for an event scheduled for any other room.

CHAPTER 21: Configure and Generate Room QR Codes

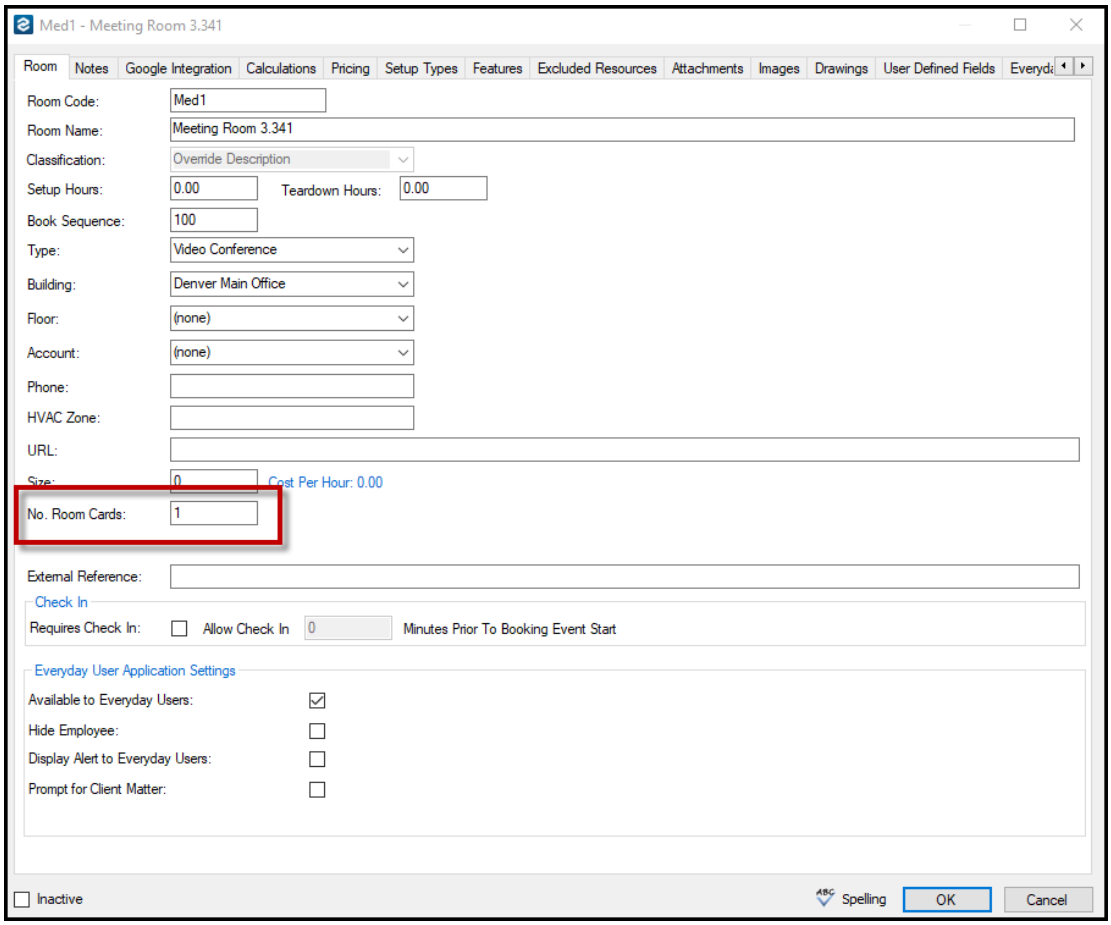
In order to associate rooms with QR Codes (in EMS Desktop Client), you will:

- Enable Room Cards for Rooms
- Run the Room Card - QR Code Report to Generate QR Codes

This automatically generates the codes and associates them with the designated rooms.

Enable Room Cards for Rooms

1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms Configuration page opens.
2. Select a room for which you want to create a QR code. (For complete instructions on configuring rooms, see Configuring Rooms.) Click **Edit**.
3. In the **No. Room Cards** field, insert a value (a number greater than 1 will allow you to generate a QR code for this room).

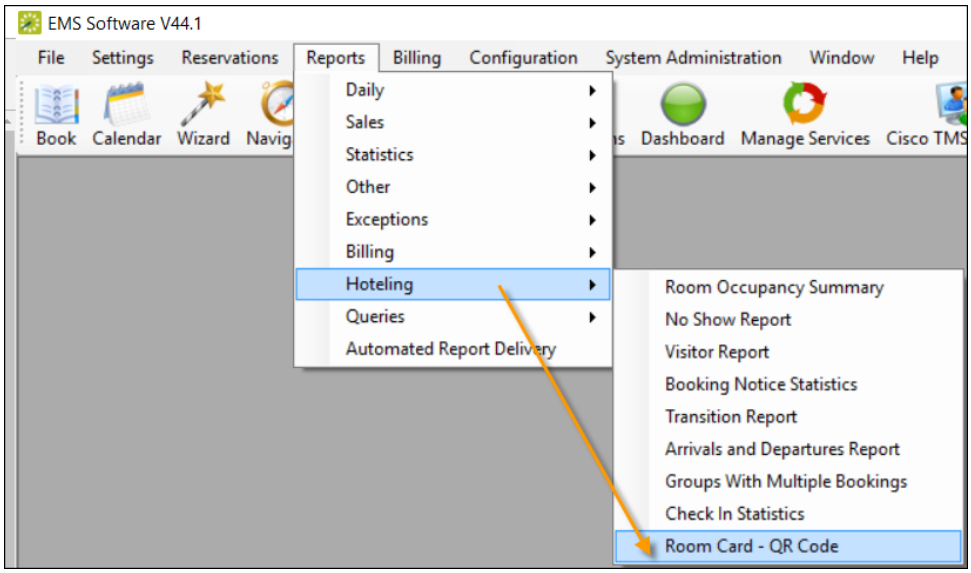


No. Room Cards Field

4. Click **OK** to save your changes.

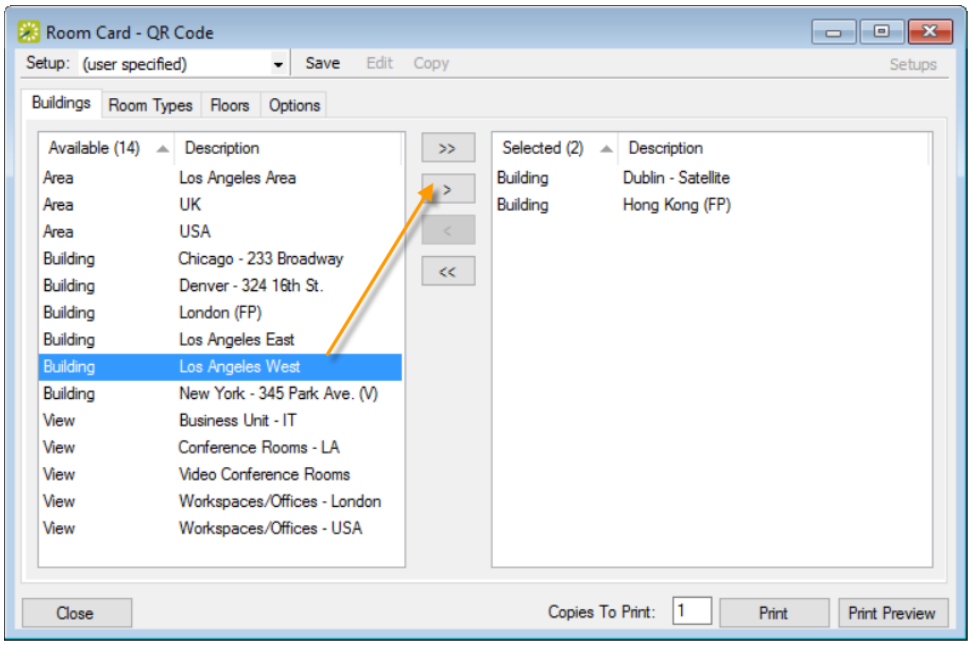
Run the Room Card - QR Code Report to Generate QR Codes

1. Select **Reports** > **Hoteling** > **Room Card - QR Code**.



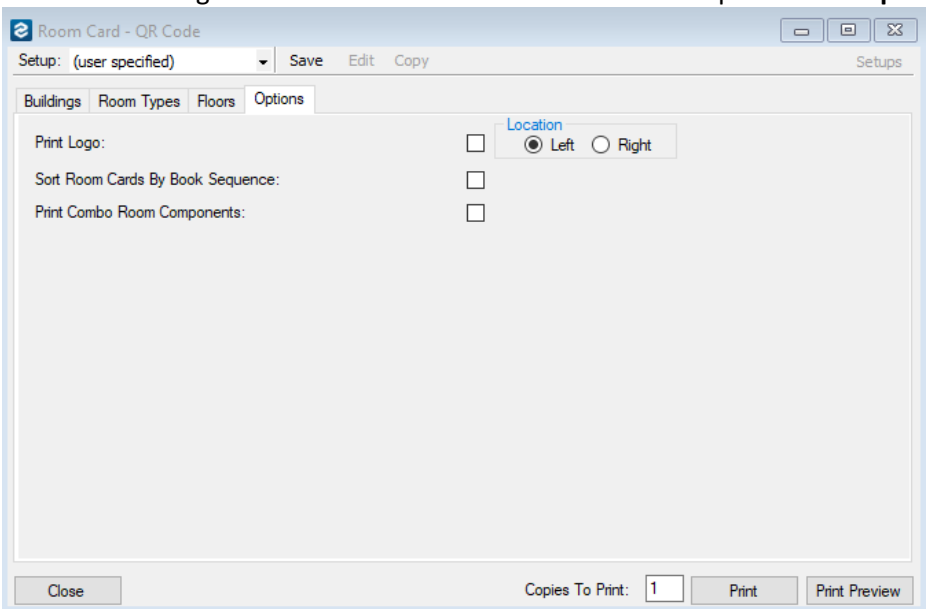
Room Card - QR Code Selection

2. In the **Room Card- QR Code** setup window that appears, use the Buildings, Room Types, and Rooms tabs to specify the parameters for the QR Code report. Use the arrow keys to move your preferences to the selected list. You must specify preferences on all three tabs.



Specify Preferences on Buildings, Room Types, and Rooms Tabs

3. You can add a logo and control the order and titles on the report on the **Options** tab.

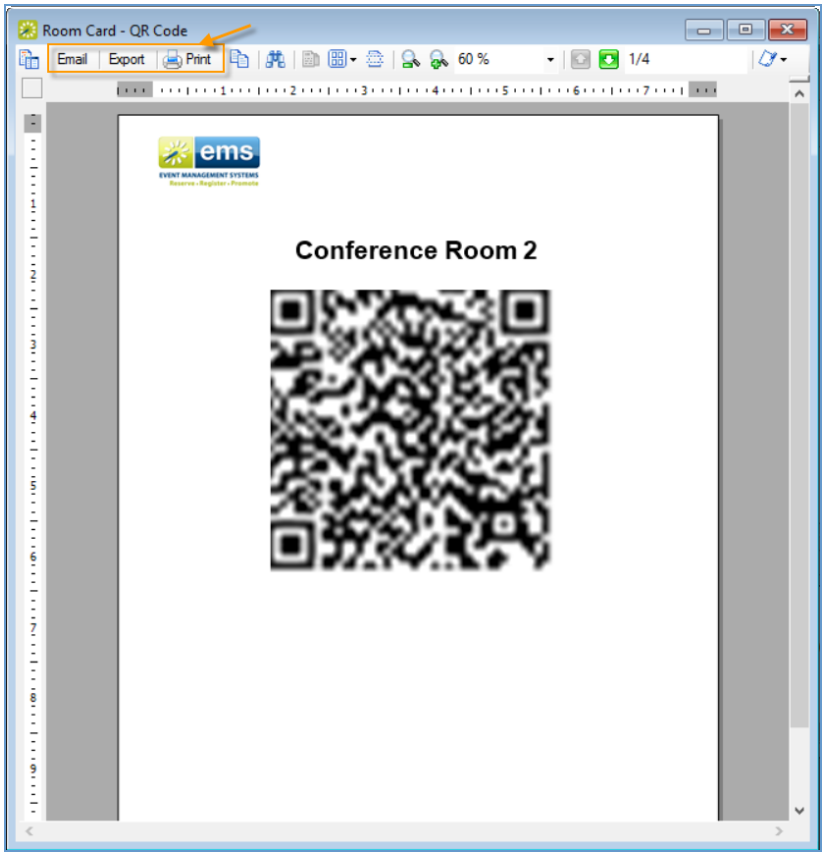


Print Logo Selections on Options Tab

- Click **Sort Room Cards By Book Sequence** to order the QR Room Cards the way they display in the Reservation Book (instead of by Room Name). Book Sequence is set in Room Configuration.
- To print separate QR Room Cards for each component (titled by Room Name), click **Print Combo Room Components**.

> **Note:**
> We recommend that you use one method to generate multiple cards for the same room: either configure the room to have more than one room card (see Step 1) or set **Copies To Print** (above) to print multiple copies.

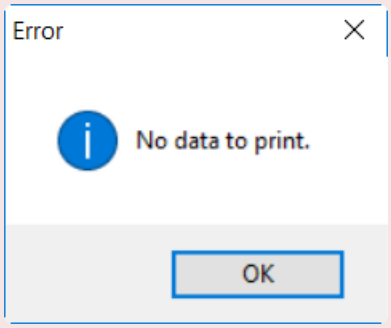
4. When you have specified all settings for your QR codes, you can click **Print Preview** to see a preview of the report (ideal for emailing, exporting, printing, and so on), or Print to print the file.



Sample Print Preview

Important!

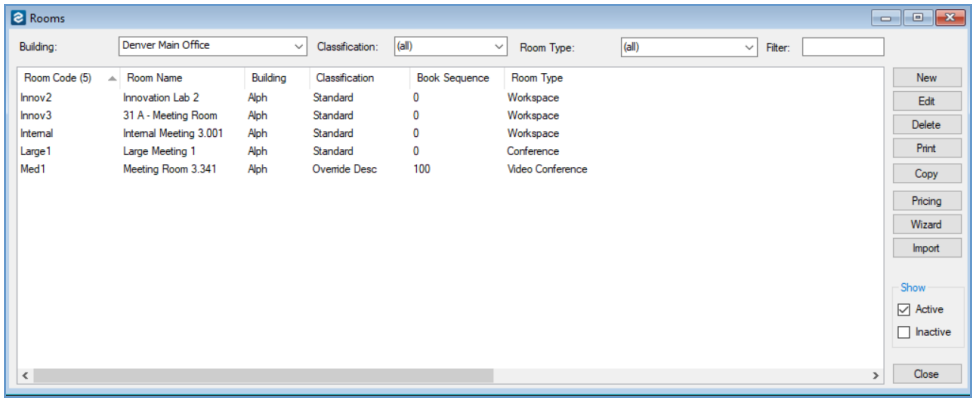
If you see the error message below, return to the initial step above. The No. Room Cards field on the Room configuration should be greater than zero.



CHAPTER 22: Import Rooms

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

1. On the EMS menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms window opens.



Rooms Window

2. On the Building drop-down list, select a specific building, a specific area, or a specific view into which to import the rooms.

> **Note:**
> If the appropriate building, area, or view is not available, you can configure it. **See Also:** Configuring Buildings, Configure Areas, or Configure Public Views.

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 Also:** Configuring Rooms.

CHAPTER 23: Export Pricing Information for a Room

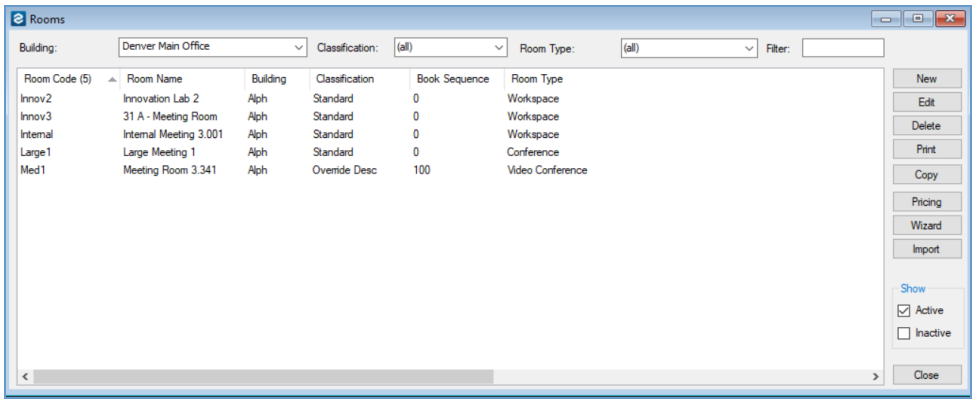
You can export any pricing information that you configure for a room on a per rate schedule basis on the Edit Pricing window. The information is exported to an Excel file.

Note:

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 resources and billable items after you have configured the information for the room or resource. See also: Export Pricing Information for a Resource and Export Pricing Information for Billable Items.

To export pricing information for a resource, do the following:

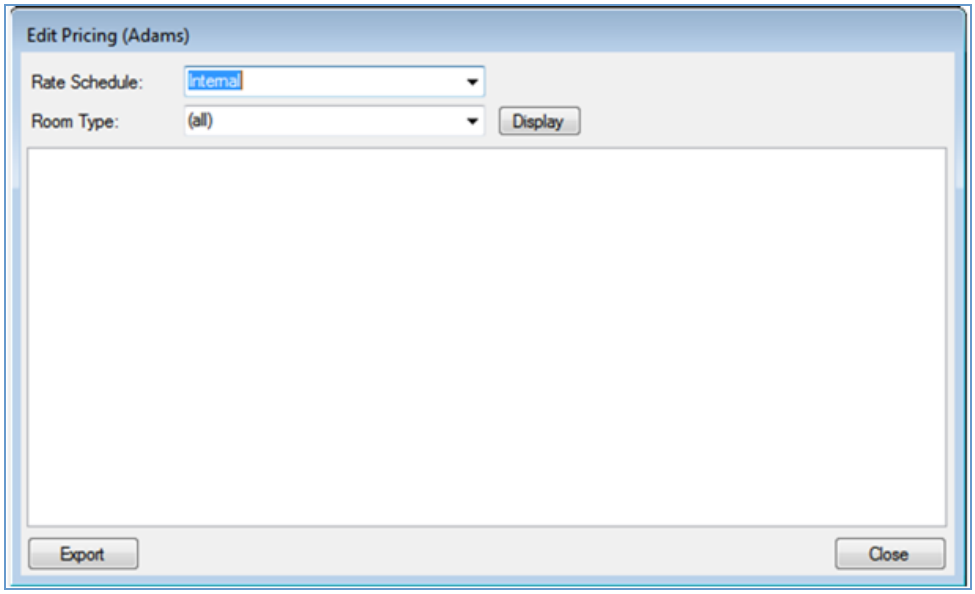
1. On the EMS menu bar, click **Configuration** > **Facilities** > **Rooms**. The Rooms Configuration window opens.



Rooms Configuration Window

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

3. Click **Pricing**. The Edit Pricing window opens.



Edit Pricing Window

4. On the Rate Schedule drop-down 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. You can edit the name of the export file if you want.
7. 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 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 open.

CHAPTER 24: Configure Buildings

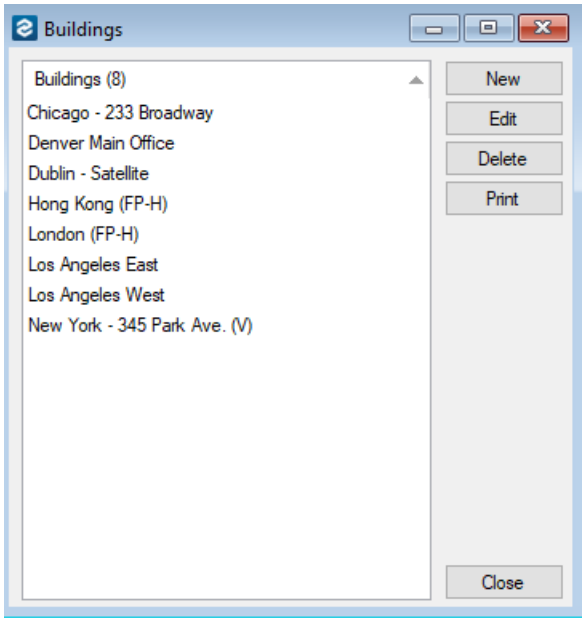
A **building** is a physical location that contains one or more spaces (e.g., rooms, open areas, etc.), that users can reserve for an event. Buildings are one of the core data items that you must configure so that your users can make reservations in EMS.

This topic provides the following information:

- Configure a Building
- Restrict a Building to Specific Categories
- Associate an Image With a Building
- Set Values for the User Defined Fields (UDFs)
- Specify Unregistered Attendee/Visitor Behavior
- Audit Tab

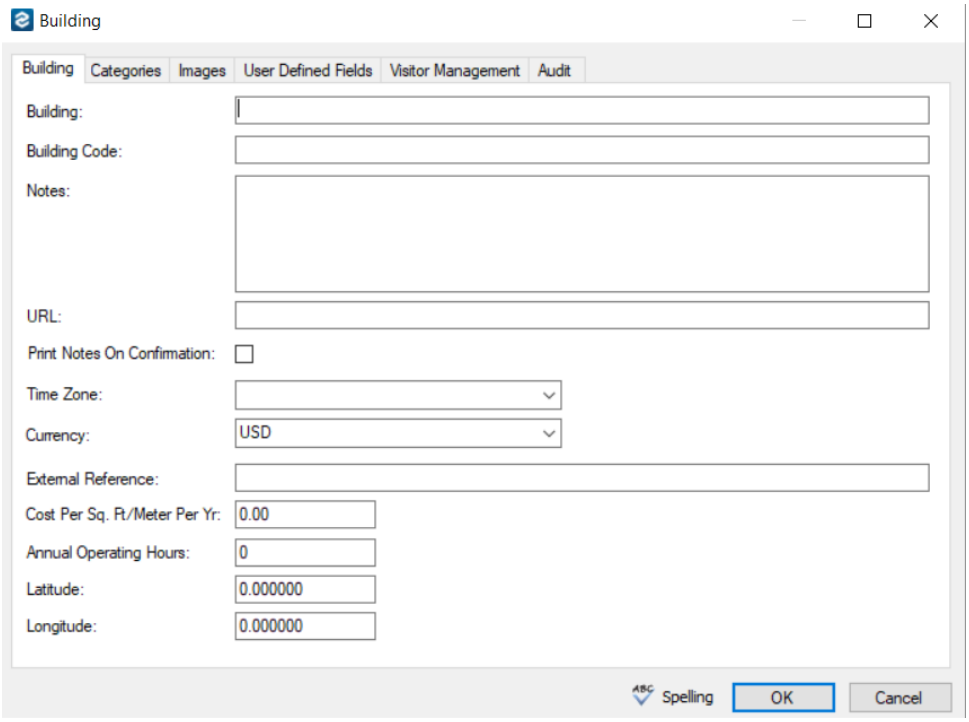
Configure a Building

1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Buildings**. The Buildings window opens. This window lists all the buildings that are currently configured in your EMS database.



Buildings Window

2. Click **New**. The Building configuration dialog opens on the **Building** tab.



Building Configuration Dialog

3. Enter the information as appropriate for the building using the subtopics in this topic.

> **Note:**
> By default, when you configure a building, the building hours are set to Open All Day. To change these hours, see Configuring Building Hours. 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 (maximum 50 characters, including spaces).
Building Code	Required field. Abbreviated text that conveys the building name or description (maximum 20 characters, including spaces). For example, if a building is named the Conference Building, then a code for the building could be CONF.
Notes	Free-form text that provides any additional information or description about the building.

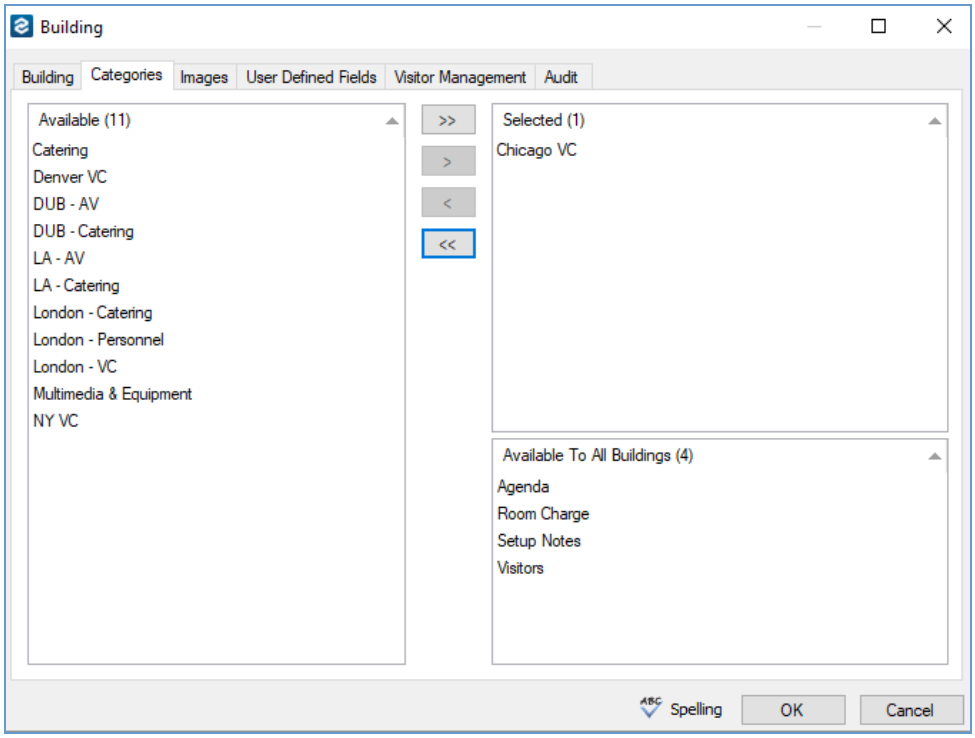
Field	Description
URL	The web address of a web page that provides more information about the building (for example, Google Maps).
Print Notes on Confirmation	Include the building notes in any confirmations that are printed for events that are scheduled in the building.
Time Zone	Required field. Select the time zone in which the building resides. **Note:** If you are configuring buildings in EMS Enterprise, you can select a unique time zone for each building. If you are configuring buildings in EMS, all buildings must belong to the same time zone.
Currency	Select the currency to be used for pricing all rooms in the building. See Configure Currencies.
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.
Latitude	This field relates to geofencing in the EMS Mobile App.
Longitude	This field relates to geofencing in the EMS Mobile App.

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

Restrict a Building to Specific Categories

You can restrict specific categories to specific buildings.

1. From the Building Configuration dialog, click the **Categories** tab.



Categories Tab of the Building Configuration Dialog

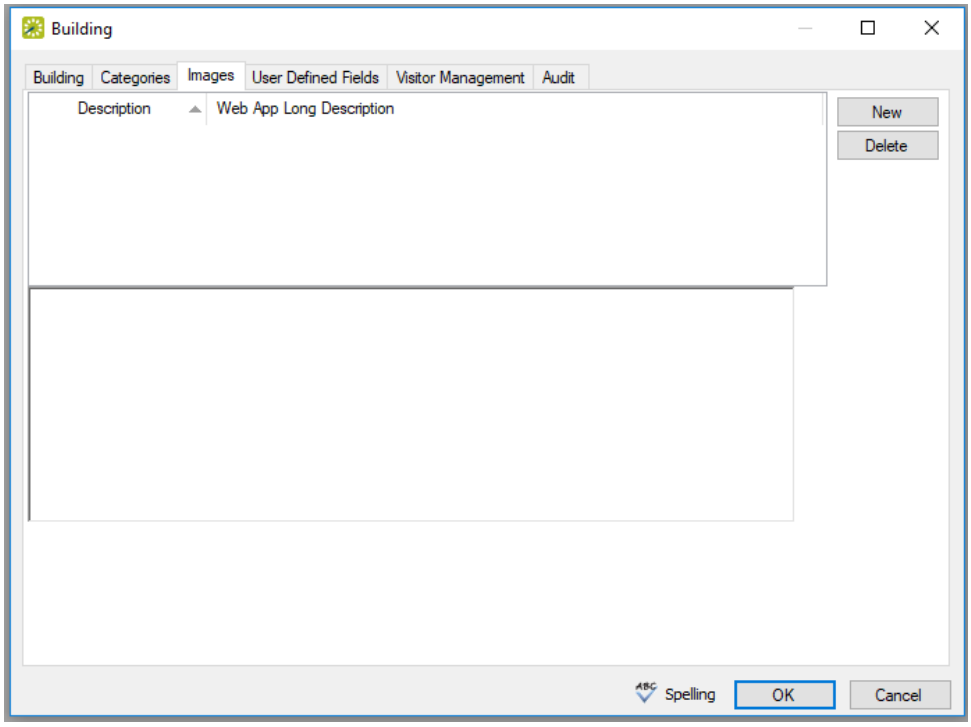
> **Note:**
> The Available to All Buildings list in the lower right pane displays all the categories that are always available to all buildings and you cannot edit this list. You can also link buildings and categories when you are configuring categories. See Configure Categories.

2. Select the categories you want to be available for use in the building, and then use the arrow buttons (<,>) to move them to the Selected list.
3. Continue with any other configuration for the building as needed; otherwise, click **OK** to close the Building dialog and return to the Buildings window. The newly configured building is displayed in the window.

Associate an Image With a Building

Images are displayed as thumbnails when an Everyday 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. From the Building Configuration dialog, click the **Images** tab.



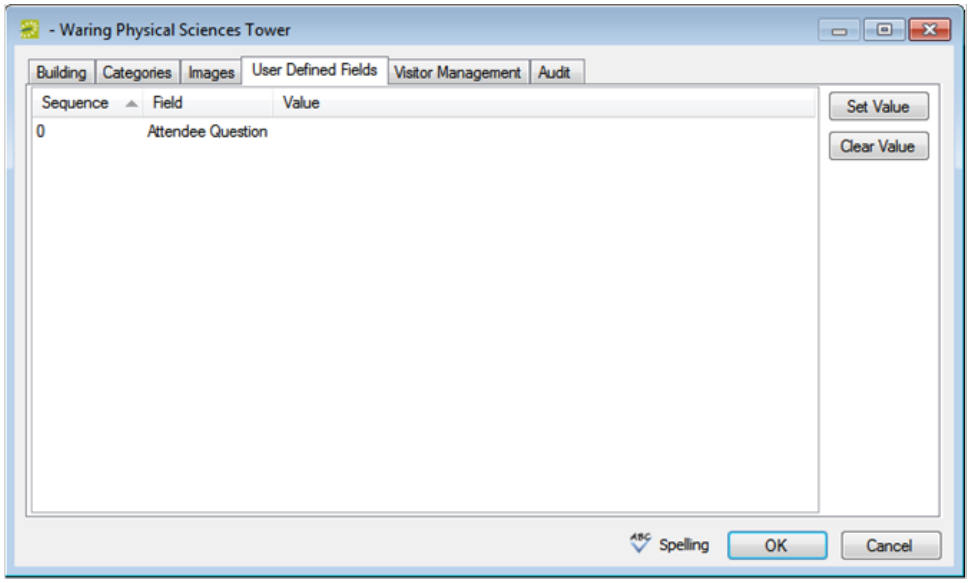
Images Tab of the Building Configuration Dialog

2. To have an image of the building display to Everyday Users when 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. You can enter a longer description of the building in the **Web App Long Description** field. The value that you enter here defines the "long desc" attribute.
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.

Set Values for the User Defined Fields (UDFs)

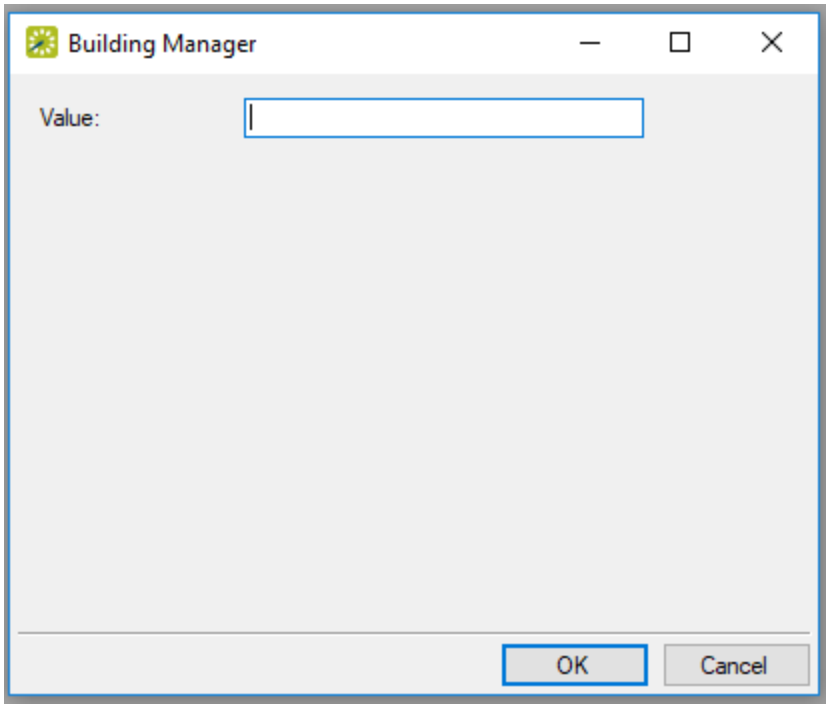
The UDF fields are used to flag details associated with a building for reporting purposes. These fields are typically used when integrating with other systems.

1. From the Building configuration dialog, click the **User Defined Fields** tab.



User Defined Fields Tab of the Building Configuration Dialog

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



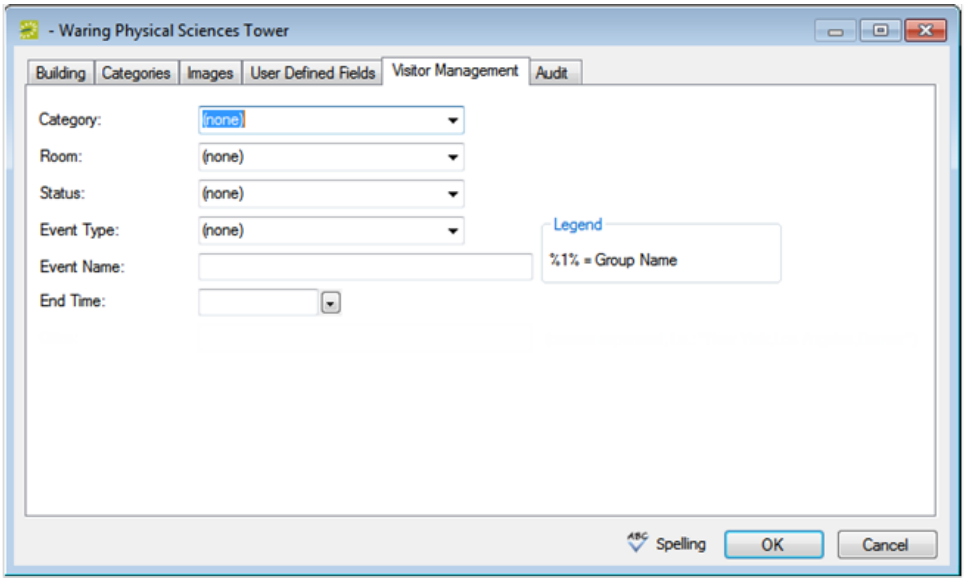
Building Manager Dialog

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.

Specify Unregistered Attendee/Visitor Behavior

The Visitor Management tab enables front-desk users, such as reception, to check in visitors, print badges, access lists of visitors, and run reports. The values that you specify on this tab are used when a new visitor checks into your building. **See Also:** Enable Visitor Management.

1. From the Building configuration dialog, click the **Visitor Management** tab.



Visitor Management Tab of the Building Configuration Dialog

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

Option	DESCRIPTION
Category	Select an Attendee type category. See Configure Categories.
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. See Configuring Override Rooms.

Option	DESCRIPTION
Status	The status that is used for an unregistered visitor's/attendee's reservation. See Configure Statuses.
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. See Configure Event Types.
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 configuration dialog and return to the list of Buildings.

Audit Tab

The Audit tab provides information about your configuration, including the date/time the configuration was originally created, when it was last modified, and by which user.

CHAPTER 25: Configure Building Hours

By configuring building hours, you can set times when buildings and rooms therein are not available for scheduling.

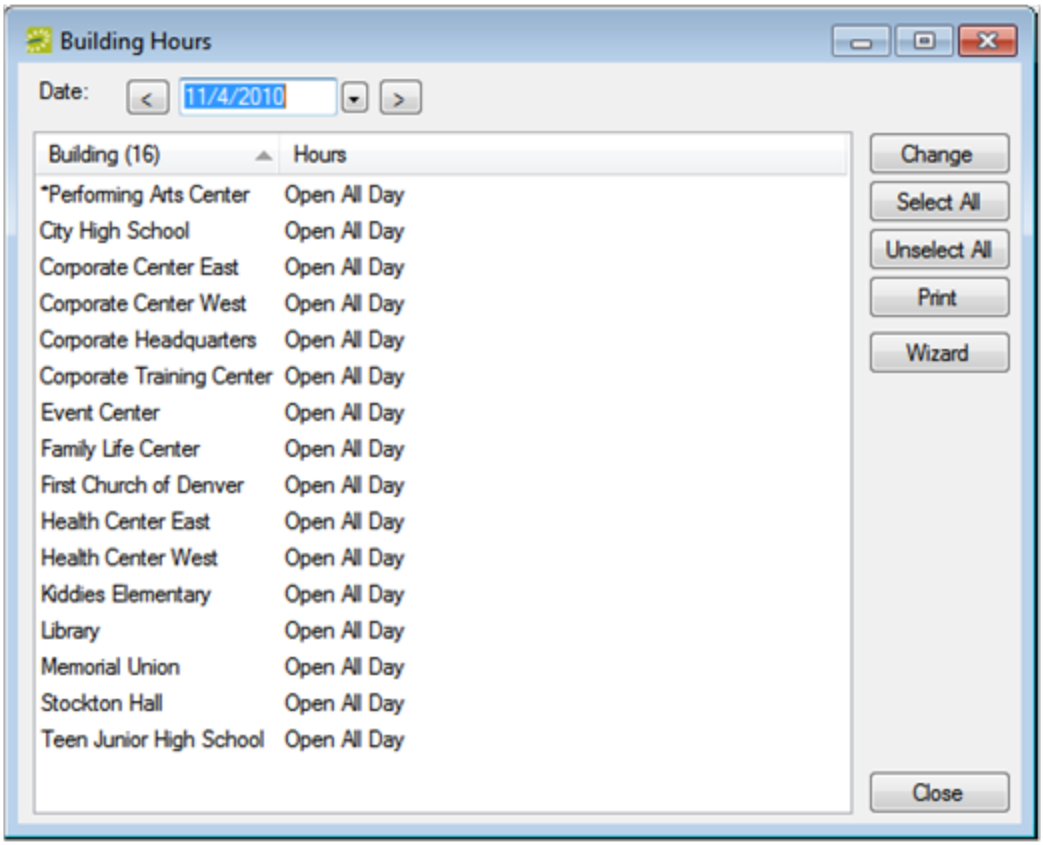
In the EMS Desktop Client, configured building hours do not prevent a user from scheduling events outside these hours. A user is merely warned that the event is being scheduled outside normal operating hours. In EMS Web App, users cannot schedule events outside the configured building hours. Setup and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

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.

Note:

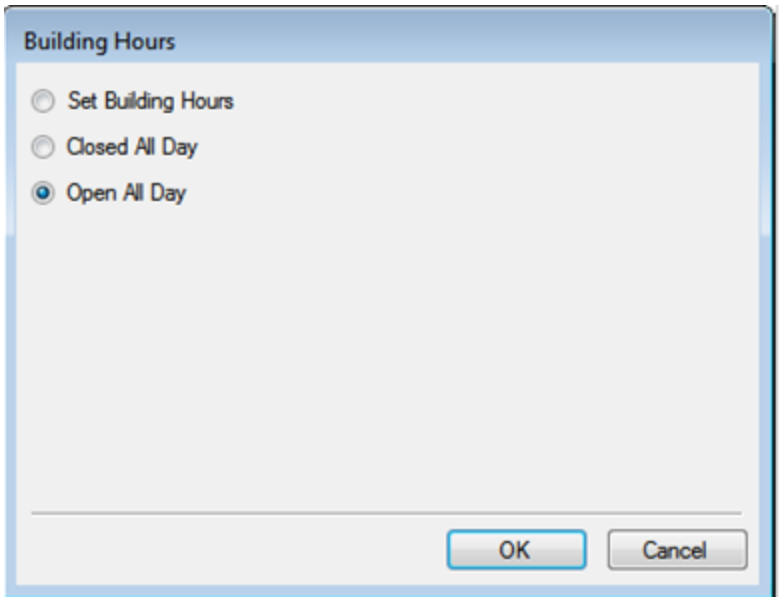
You can configure the same hours for multiple buildings using the Building Hours Wizard.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > **Building Hours**. The Building Hours window opens. This window lists buildings that are configured in your EMS database.



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**. The Building Hours dialog box opens.



Building Hours Dialog

> **Note:**
> 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. You can set the same building hours for multiple buildings simultaneously using the Building Hours Wizard.

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 Desktop Client 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:** EMS Web App users cannot make reservations outside of building hours.
Closed All	Select this option to close the building for the entire day. When you

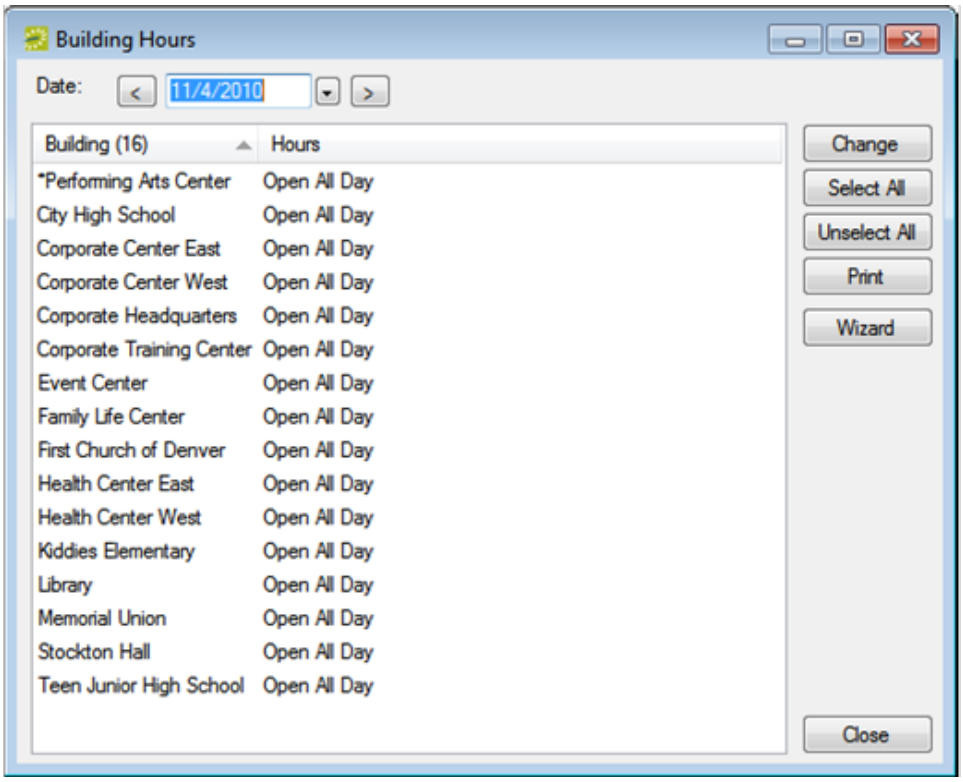
Option	Description
Day	select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do *not* select Web Only, then none of your users (EMS Desktop Client or EMS Web App) can make reservations on this date in the selected buildings. • If you do you select Web Only, then your EMS Desktop Client users can make reservations on this date in the selected buildings; however, your EMS Web App 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** to return to the Building Hours window.

CHAPTER 26: Building Hours Wizard

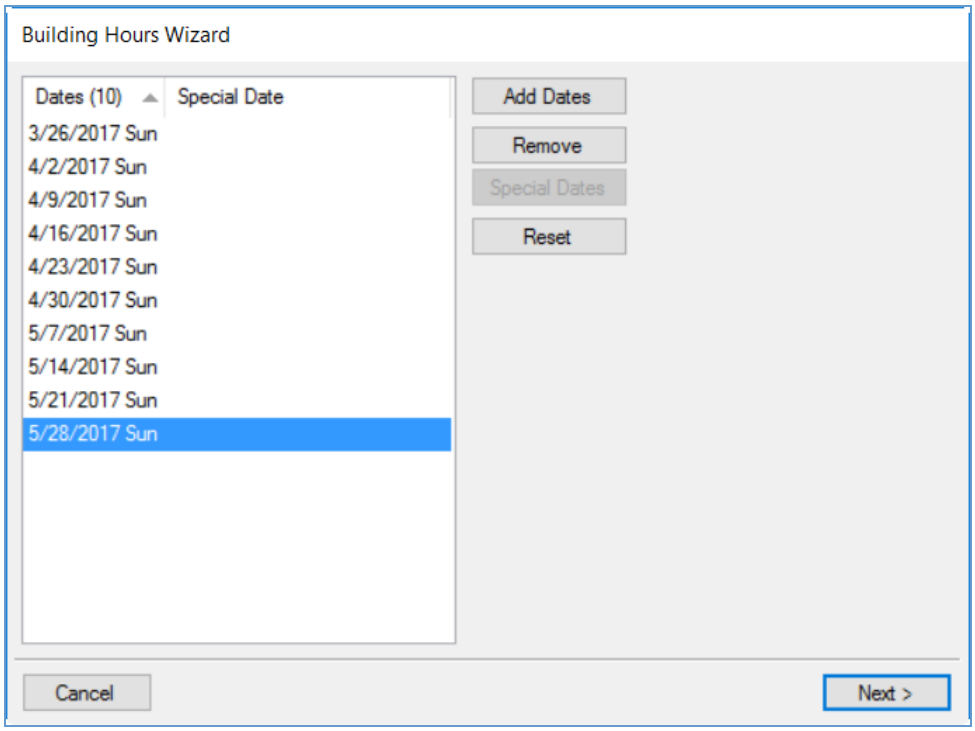
The Building Hours Wizard streamlines the configuration process and allows users to configure building hours for multiple dates.

1. On the EMS Desktop Client 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 Desktop Client database.



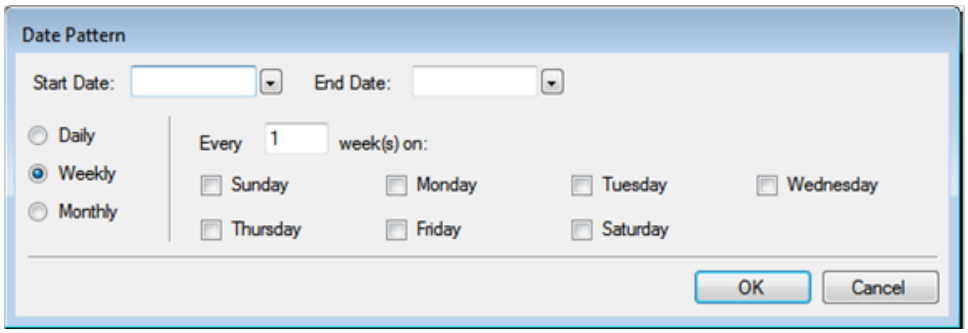
Building Hours Window

2. Click **Wizard**. The Building Hours Wizard opens.



Building Hours Wizard

3. Click **Add Dates**. The Date Pattern dialog box opens.



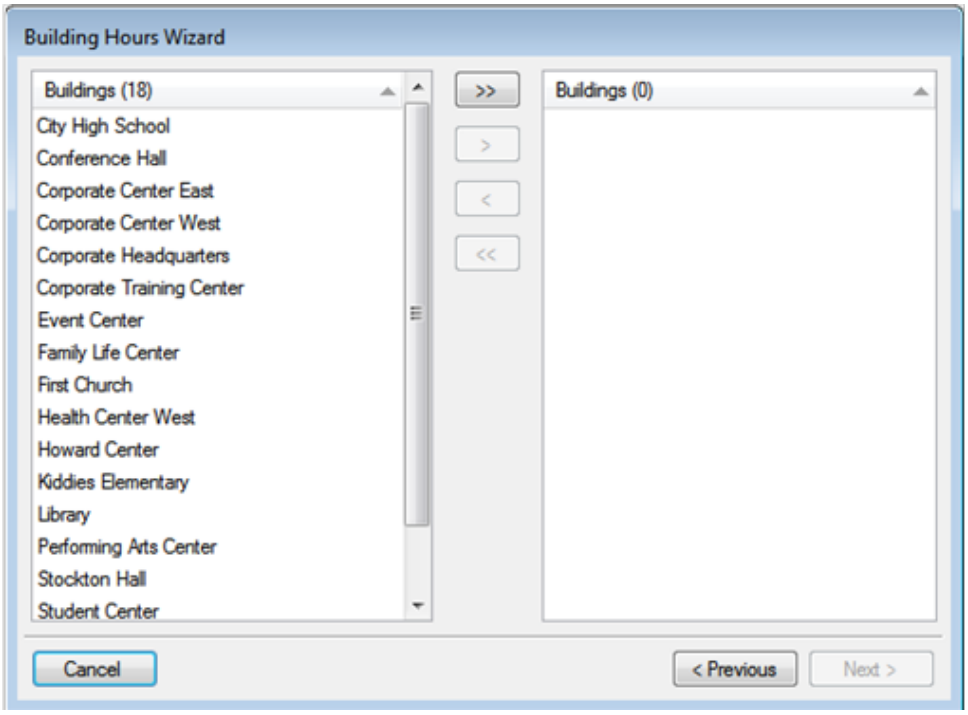
Date Pattern Dialog

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. To view information about a date that is marked as a holiday, you can select the date, and then click **Special Dates**. To remove any dates from the list, you can 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 the buildings that have been configured in your EMS Desktop Client database.



Building Hours Wizard with a list of configured buildings

7. Select the buildings for which you are configuring the same hours, and then use the arrow 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 Desktop Client 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.

Option	Description
	Note: EMS Web App 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 Desktop Client or EMS Web App) can make reservations on this date in the selected buildings. • If you do you select Web Only, then your EMS Desktop Client users can make reservations on this date in the selected buildings; however, your EMS Web App users cannot. Configure Pricing Info
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

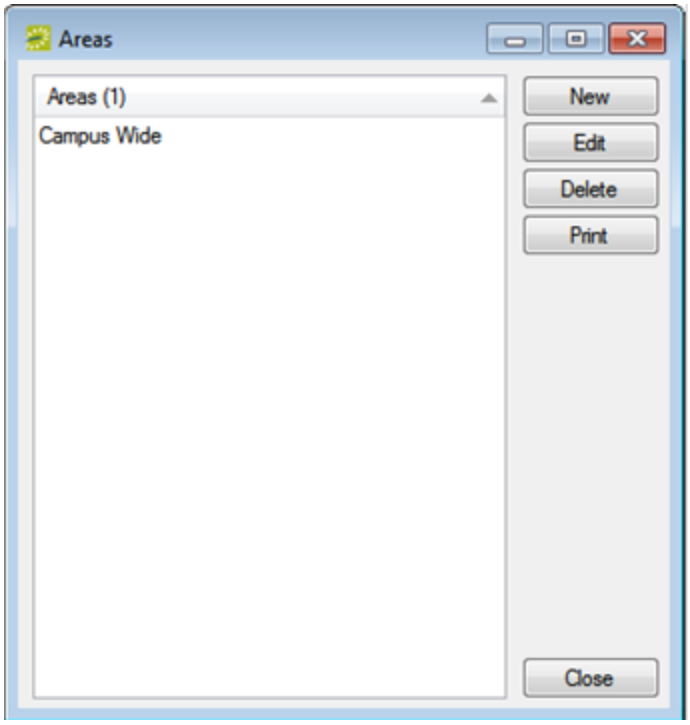
10. Click **Finish**. The Building Hours Wizard closes. You return to the Building Hours window.

CHAPTER 27: Configure 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 EMS Web App, in reporting, and so on. When you configure an area, you must specify the buildings that are to be included in the area.

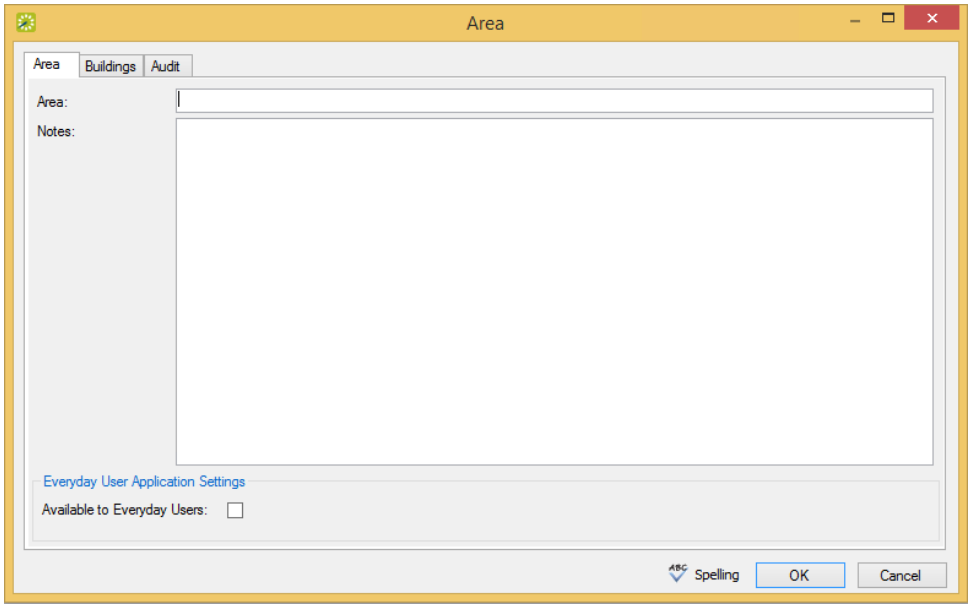
Note:
You can configure areas only in EMS Enterprise. You cannot configure areas in EMS Professional.

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.



Areas Window

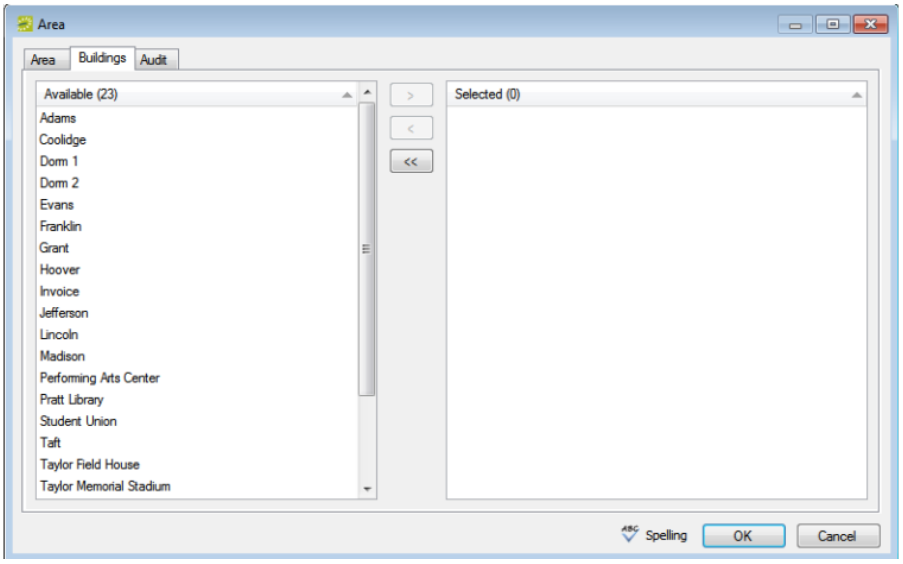
2. Click **New**. The Area dialog box opens. The **Area** tab is the active tab.



Area Tab of the Area Dialog

> **Note:**
>
> 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.
>
> In the **Notes** field, you can enter additional information that is pertinent for the area.
>
> For EMS Web App users to be able to see and filter by this area, select the **Available to Everyday Users** checkbox.

3. Open the **Buildings** tab, and on the Available list, select the building (CTRL-click to select multiple buildings) you want included in the Area, and then Move (>) to the Selected list.



Buildings Tab of the Area Dialog

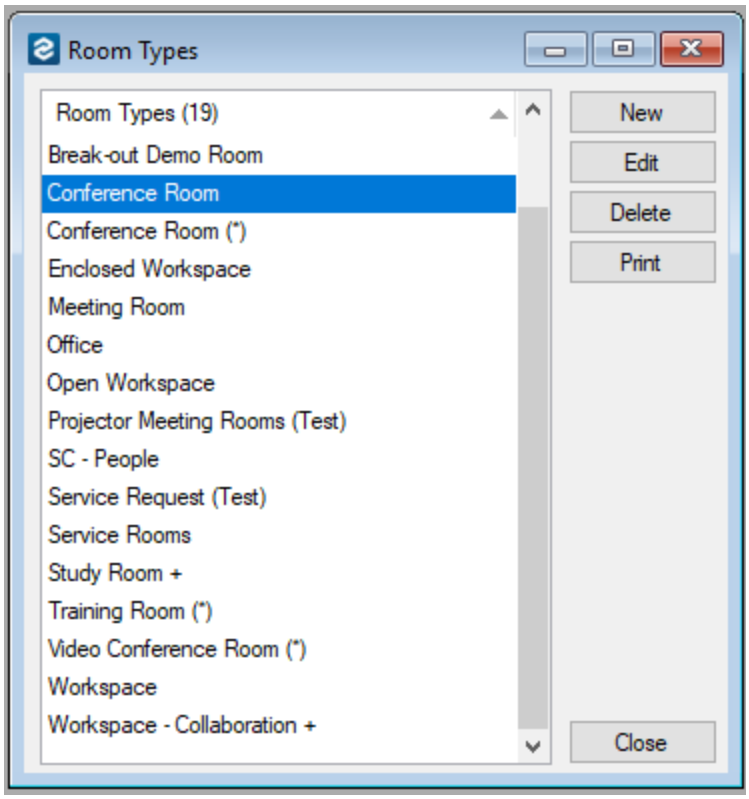
> **Note:**
> You can click **Spelling** to spell-check the area description before you save the area.

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

CHAPTER 28: Configure Room Types

A *room type* is the class or category of the room (e.g., a meeting room, an auditorium, a workspace, a multi-purpose room, etc.). Users can use room types to filter search results.

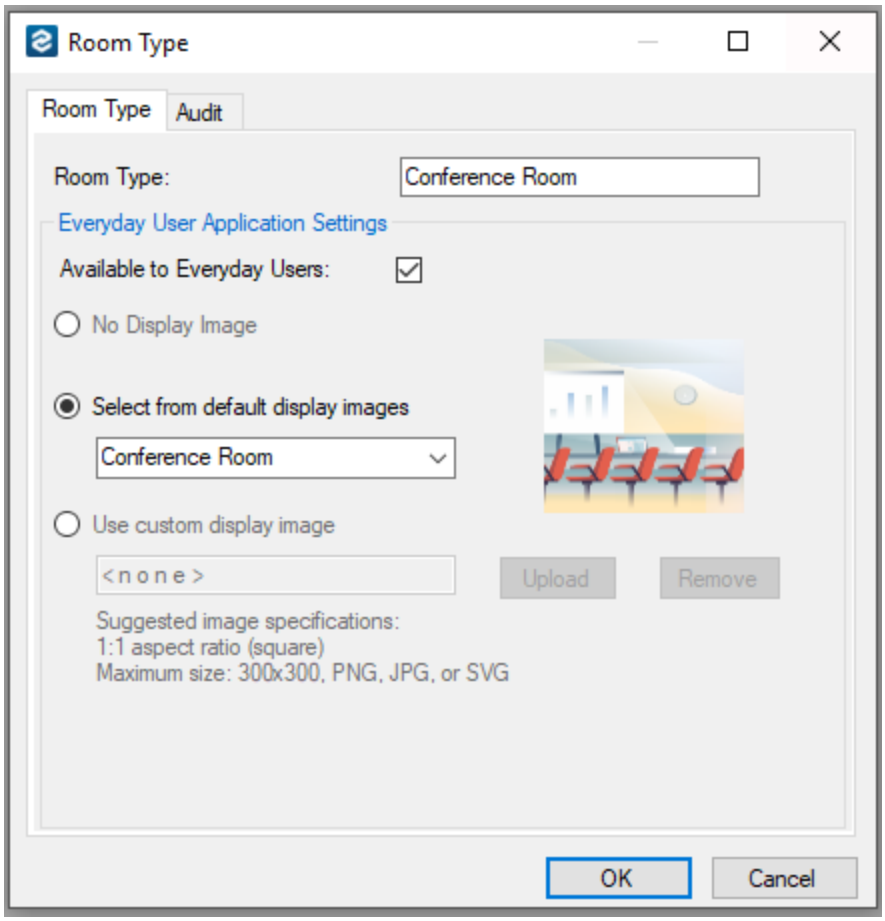
1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Room Types**.
   The Room Types window opens. This window lists all the room types that are currently configured in your EMS database.



Room Types Window

2. Click **New**.

   The Room Type dialog box opens.



Room Type Dialog

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 all Everyday Users to see this room type when they are searching for available space, leave **Available to Everyday Users** checkbox selected.

5. If you have EMS for Google Calendar, you can choose whether to display an image for the room type with one of the following options:

> **Note:**
> Currently, the image options on the **Room Types** tab only work with EMS for Google Calendar. If you choose to display images for room types, the images will only appear in EMS for Google Calendar. These images will not appear in EMS Web App, EMS Mobile App, and so on.

- **No Display Image:** Select this option to have no image displayed for the room type.
- **Select from default display images:** From the drop-down list, select a default image to display for the room type.
- **Use custom display image:** Select this option to upload an image to display for the room type. The recommended aspect ratio is 1:1 (square). The maximum image size is 300 x 300, and the image file must be a .png, .jpg, or .svg.

6. Click **OK**.

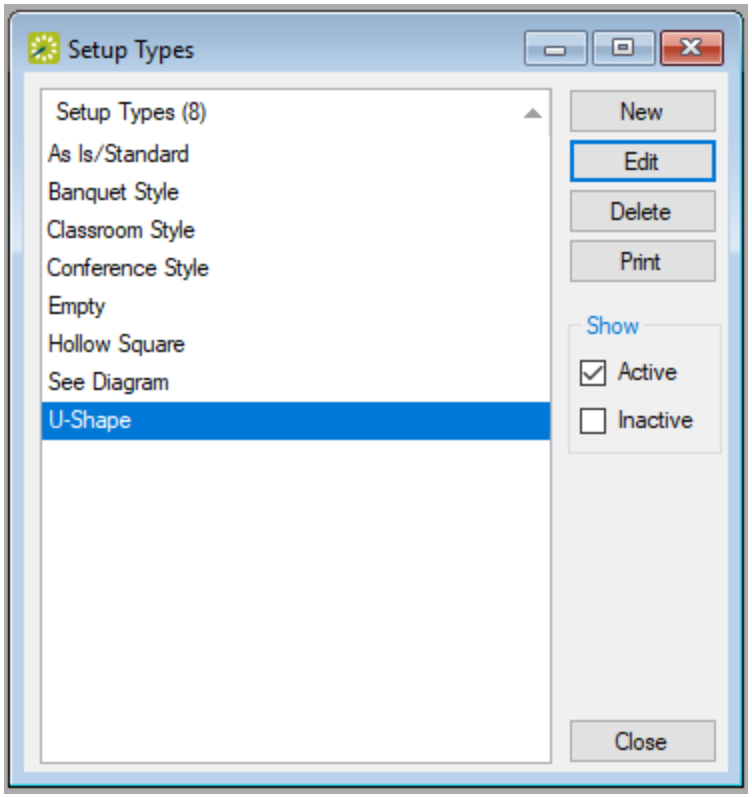
   The Room Type dialog box closes, and you return to the Room Types window with the newly configured room type automatically selected.

> **Note:**
> An Override Room is used in EMS to loosely define useable space that is not formally configured. See Also: Configure Override Rooms.

CHAPTER 29: Configure Setup Types

A **setup type** is the physical layout or arrangement of a room (e.g., classroom, conference, theater-style, rounds of 6, as-is, etc.). Setup types predefine rooms for a smoother booking process. 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.

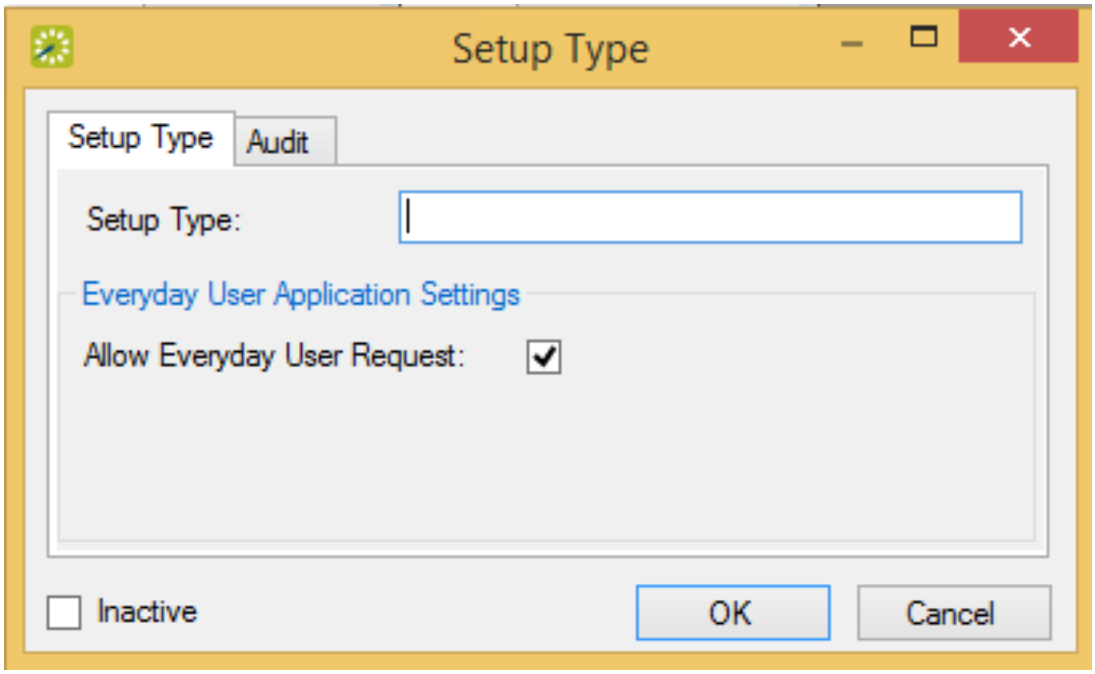
1. On the menu bar, click **Configuration** > **Facilities** > **Setup Types**. The Setup Types window opens. This window lists all the setup types that are currently configured in your EMS database that have a status of **Active**.



Setup Types Window

> **Note:**
> 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.



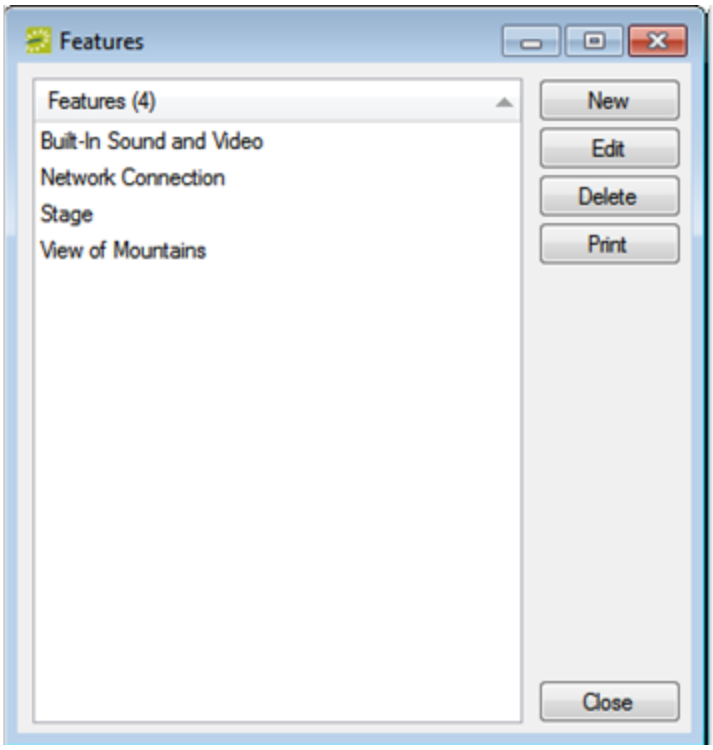
Setup Type Dialog

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 all Everyday Users to be able to see and request this setup type when they are searching for available space, leave **Allow Everyday User Request** option selected.
5. Leave **Inactive** blank to add the setup type as an active type. Optionally, select Inactive to inactivate 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.

CHAPTER 30: Configure Features

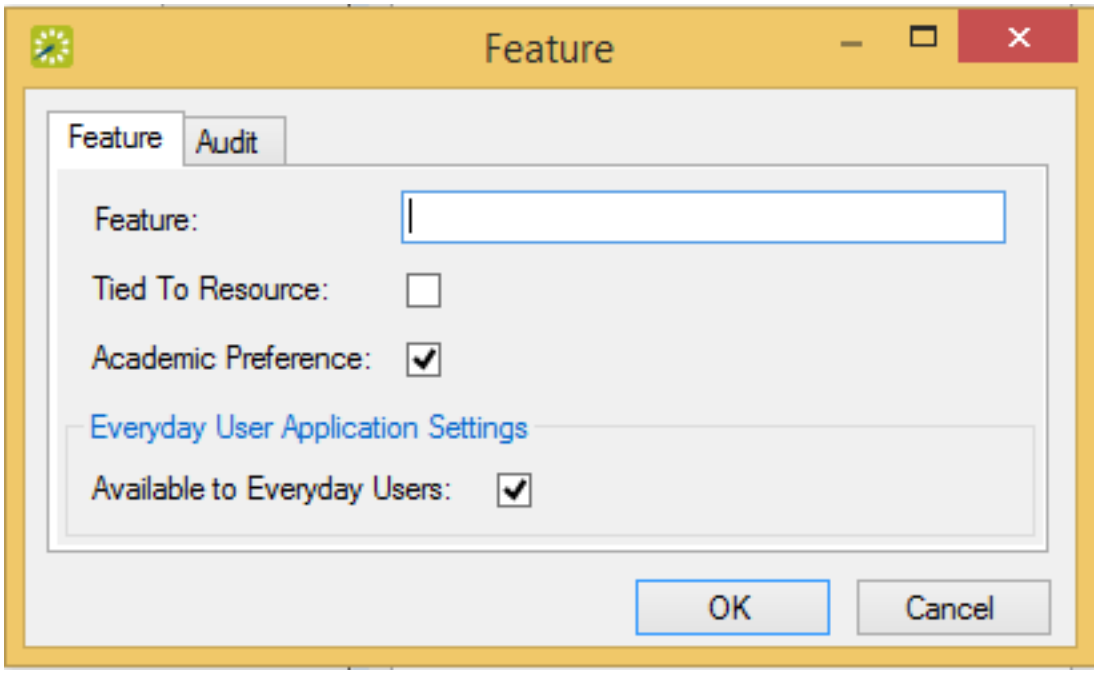
A **feature** is built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. Your users can use features as criteria when they are searching for a room. They can also filter the available rooms that can be reserved for an event by room features. After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



Features Window

2. Click **New**. The Feature configuration dialog opens.



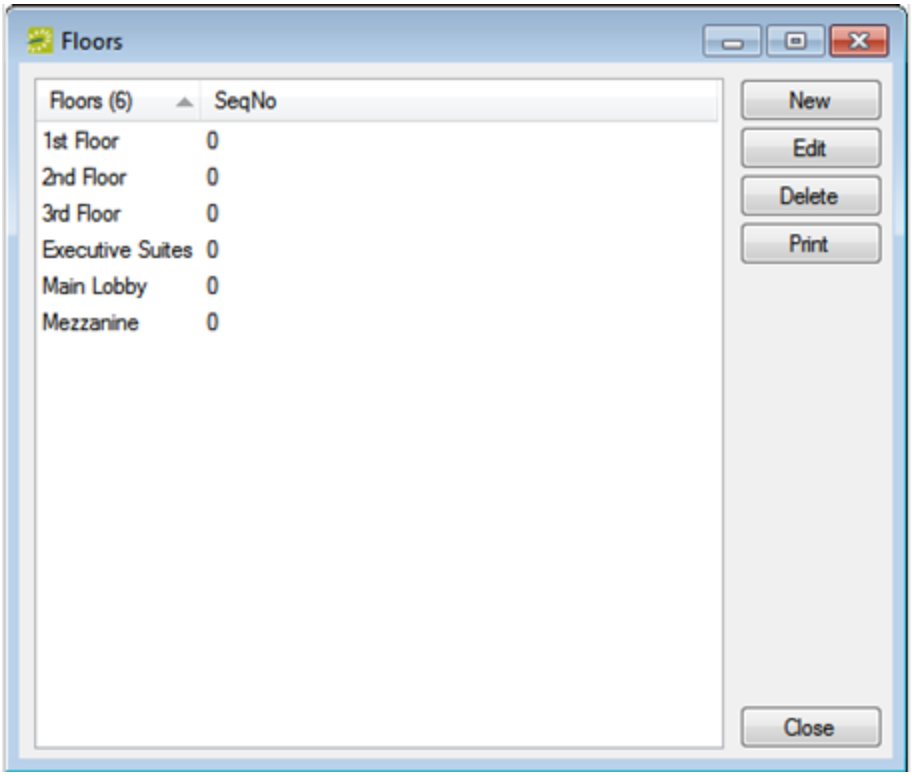
Feature Configuration Dialog

3. In the **Feature** field, enter a name or description for the feature (maximum of 50 characters, including spaces).
4. If this feature is a video conferencing feature, then select **Tied to Resource**. See Also: Configure Video Conference Capabilities.
5. If you want all Everyday Users to see this feature when they are searching for available space, leave **Available to Everyday Users** selected.
6. Click **OK**. The Feature configuration dialog closes. You return to the Features window with the newly configured feature automatically selected.

CHAPTER 31: Configure Floors

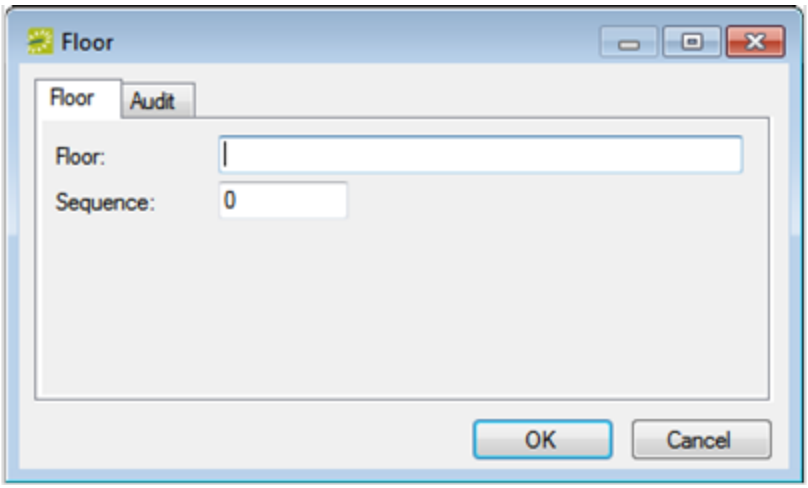
A **floor** is optional information that you can provide when defining a room. This information will facilitate sorting, reporting, and searching for rooms. A room can be assigned to only a single floor. Example of floors include First Floor, Basement, and Garden Level. When you configure a floor, you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

1. On the EMS Desktop Client menu bar, click **Configuration** > **Facilities** > **Floors**. The Floors configuration page opens to show all the floors that are currently configured in your EMS database.



Floors Configuration Page

2. Click **New**. The Floor Configuration dialog box opens.



Floor Configuration Dialog

3. In the Floor field, enter a name or description for the new floor (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 drop-down 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 drop-down list.

5. Click **OK**. The Floor configuration page closes. You return to the Floors window with the newly added floor automatically selected.

CHAPTER 32: Configure Floor Plans

Floors plans are an optional feature enabled by an EMS Floor Plans license, that allows users to view available rooms and book a space directly from a floor plan image in EMS Web App or EMS Kiosk App.

This topic provides information on the following:

- Configure Floor Plan Indicators
- Configure a Floor Plan Diagram
- Map a Floor Plan

Configuring floor plans in the Floor Plan module is a three-step process:

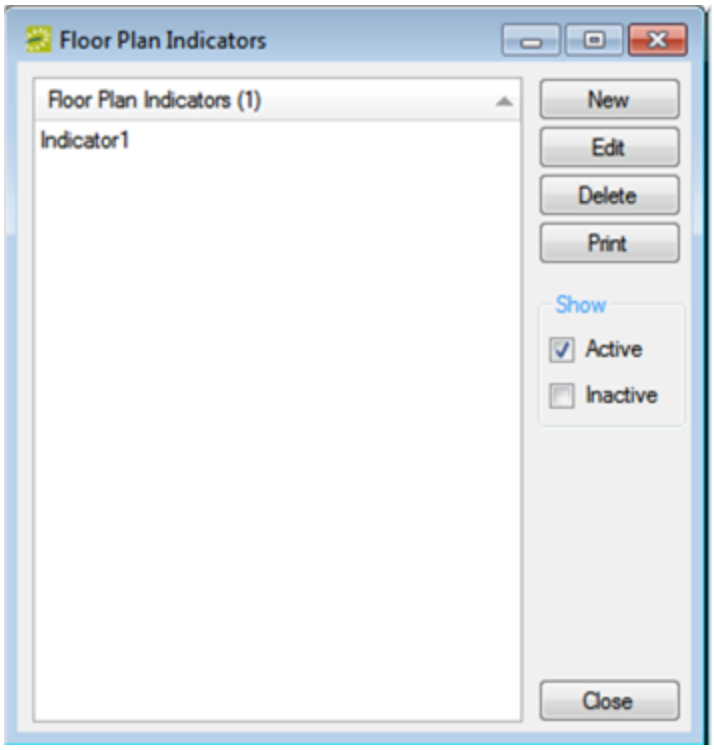
1. *Configure the floor plan indicators* (the images used indicate whether a room is available or unavailable for a floor plan). For example, you might use something as simple as a green square to indicate that a room on a floor is available and a red square to indicate that a room on a floor is unavailable.
2. *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.
3. *Map your floor plan indicators to rooms* on your diagrams using the Floor Plan Configuration utility.

The availability of each reservable space ultimately determines the indicator (available or unavailable) that shows on a floor plan in EMS Web App or EMS Kiosk App.

Configure Floor Plan Indicators

> **Note:**
> Floor plan indicators do **not** scale when you zoom in and out of the floor plan.

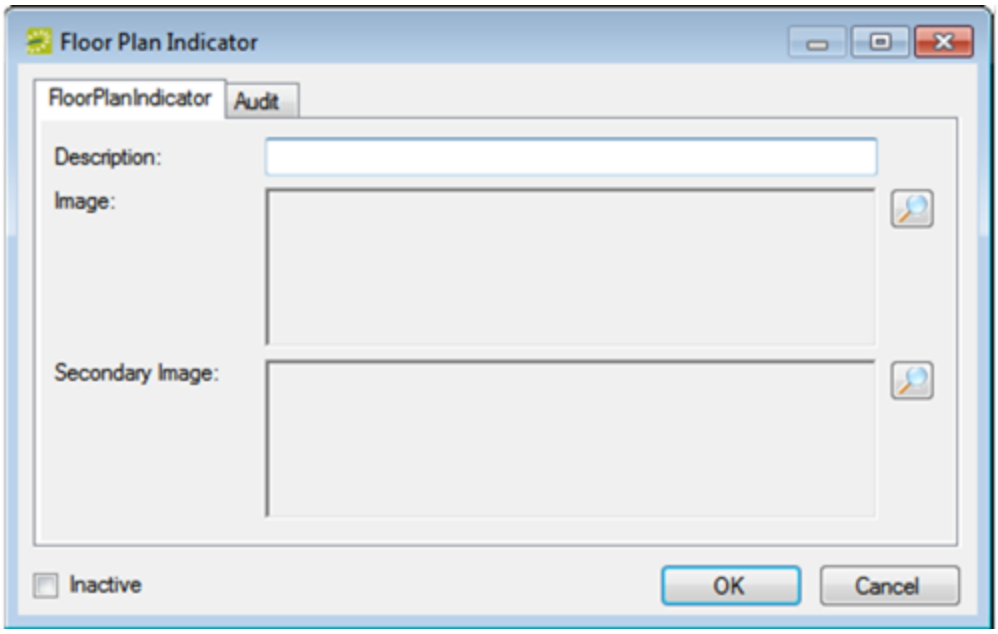
1. On the EMS menu bar, click **Configuration** > **Facilities** > **Floor Plan Indicators**. The Floor Plan Indicators window opens, listing active indicator sets currently configured in your EMS database.



Floor Plan Indicators Window

> **Note:**
> To see all indicator sets regardless of status, under Show, click **Inactive**.

2. Click **New**. The Floor Plan Indicator dialog box opens.



Floor Plan Indicator Dialog

3. In the Description field, enter a name or description for the new floor plan indicators (max 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 **Search** to browse to and select an image to use for the *available* indicator.

5. Next to the Secondary Image field, click **Search** to browse to and select an image to use for the *unavailable* indicator.

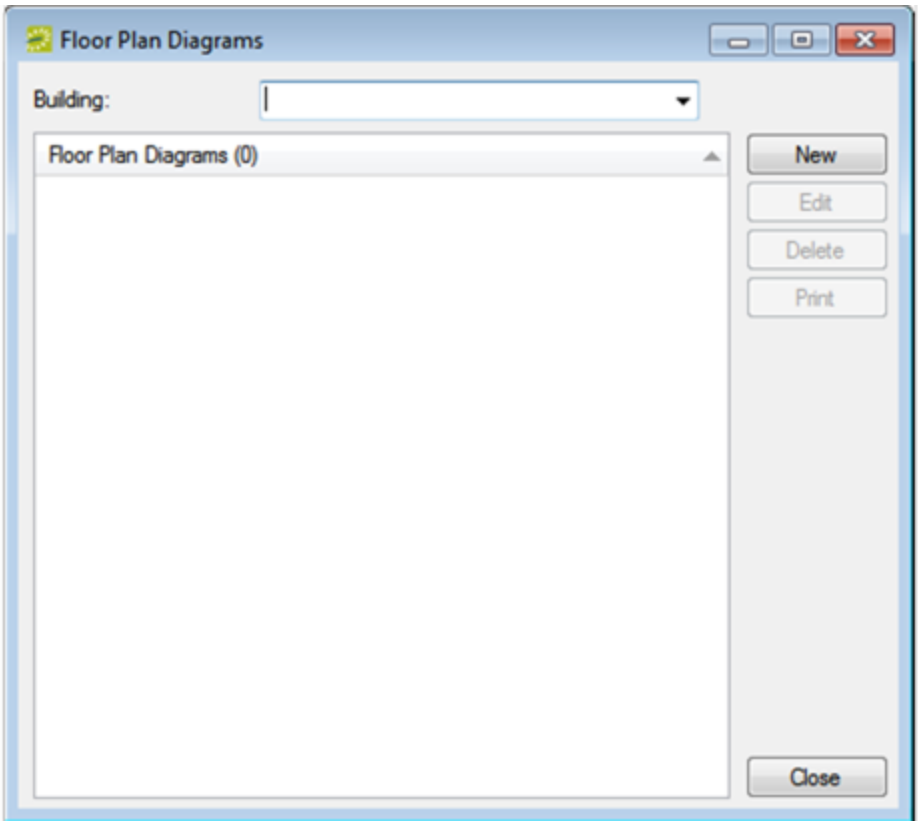
> **Note:**
> The image must be in .png, .jpg, .jpeg, .jpe, .jfif, or .svg format.

6. Click **OK**. Your new floor plan indicators are added as active. Optionally, select **Inactive** to deactivate the set.

Configure a Floor Plan Diagram

You must configure one floor plan diagram for each floor that will be available for booking in EMS Web App and the EMS Kiosk App.

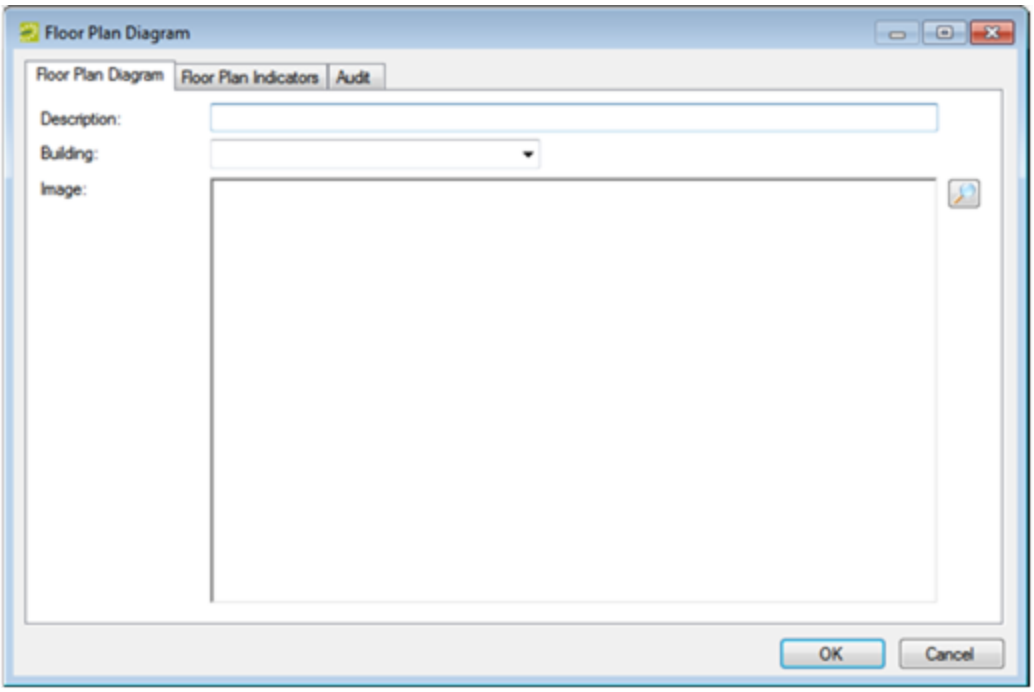
1. On the EMS menu bar, click **Configuration** > **Facilities** > **Floor Plan Diagrams**. A blank Floor Plan Diagrams window opens.



Floor Plan Diagrams Window

2. Optionally, in the Building drop-down list, select (all), or select a specific building to see 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 on **Floor Plan Diagram** tab.



Floor Plan Diagram Tab of the Floor Plan Diagram Dialog

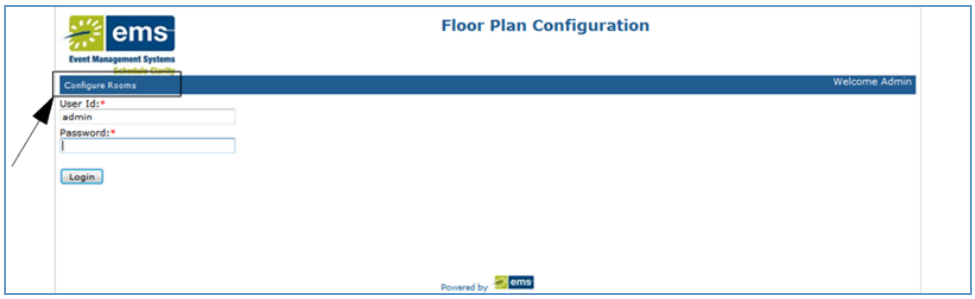
4. In the Description field, enter a name or description for the new floor plan diagram (maximum of 50 characters, including spaces).
5. On the Building drop-down list, select the building for which you are configuring the floor plan diagram.
6. Next to the Image field, **Search** to browse and select the image to use for the floor plan diagram.

> **Note:**
> Image files must be .png, .jpg, .jpeg, .jpe, .jfif, or .svg. Optimal image size is 1024 x 768.

7. Open the Floor Plan Indicators tab, and on the Available list, select the floor plan indicator (CTRL-click to select multiple floor plan indicators) you want to use for this diagram, and then Move (>) to the Selected list.
8. Click **OK**. The Floor Plan Diagram dialog box closes and you return to the Floor Plan Diagrams window with the newly configured floor plan diagram automatically selected.

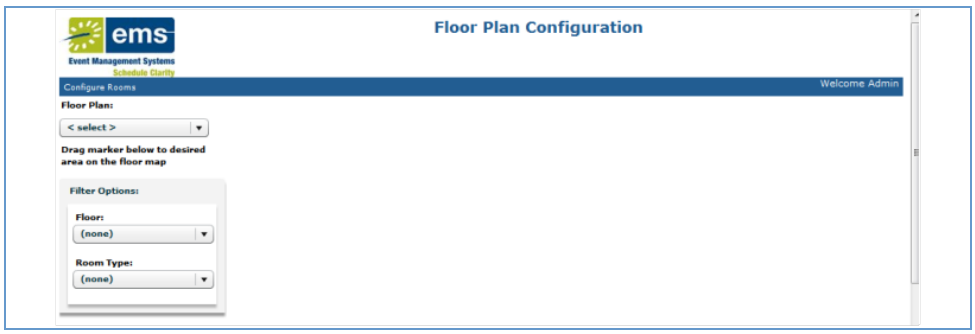
Map a Floor Plan

1. Log in to the Floor Plan Configuration module. The Configure Rooms option shows above the Login fields on the main window.



Floor Plan Configuration Module, Main Window with Configure Rooms Option

2. Click **Configure Rooms**. The Configure Rooms page opens.



Floor Plan Configuration Module, Configure Rooms Page

3. On the Floor Plan drop-down 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 the above steps until you have identified all the reservable spaces on the floor.
6. For each indicator, do the following:
   - Click on the indicator to open a Room Details dialog box.
   - On the Rooms drop-down list, select the room for the indicator, and then click **Save**.

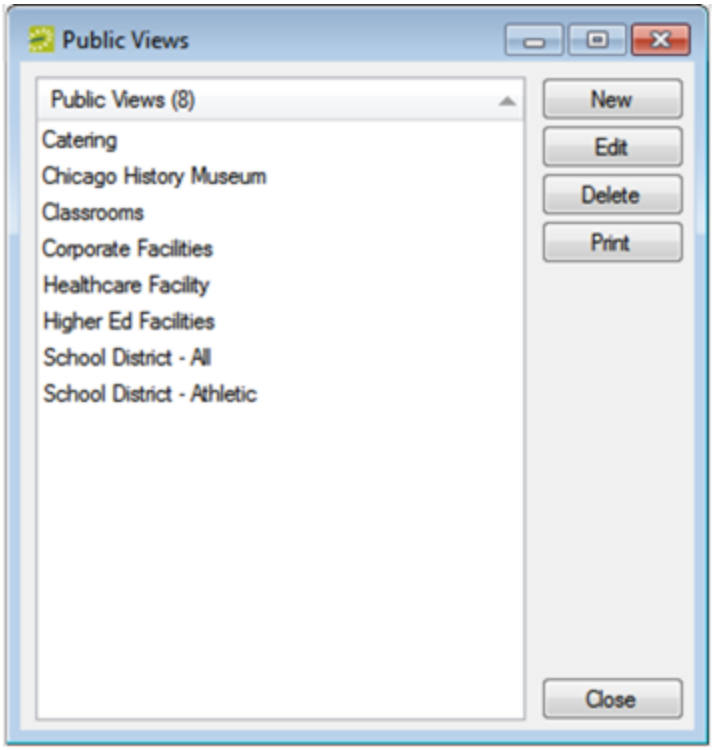
> **Note:**
> To filter the list of available rooms, select a specific floor and/or room type under Filter Options. Drop an indicator on the floor plan. Click **Save**. It is not necessary to configure a room in the indicator.

7. Close the Floor Plan Configuration module.

CHAPTER 33: Configure Public Views

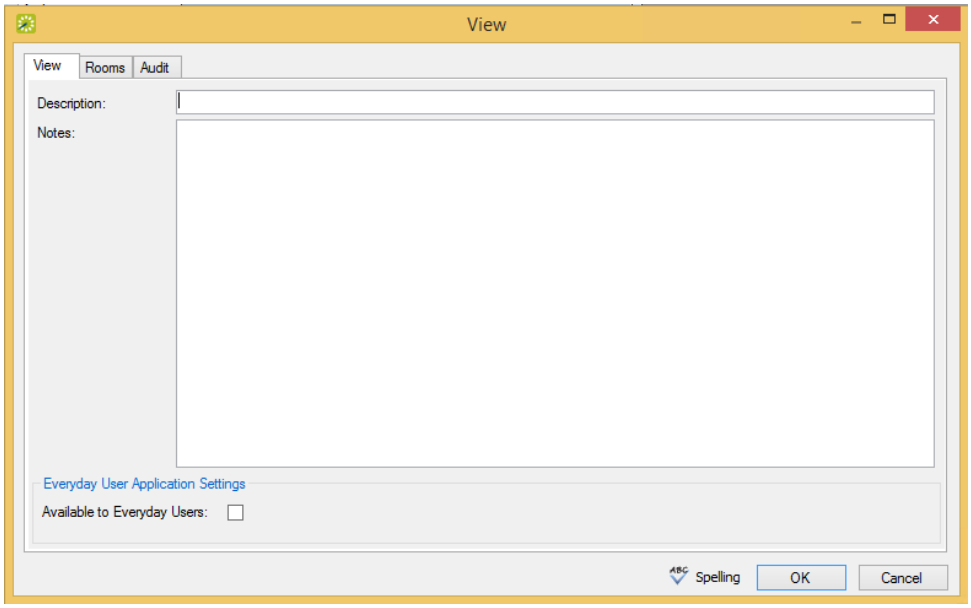
A **public view**, or simply a **view**, is a grouping of specific rooms that you configure. You use views to organize rooms within one building or across multiple buildings in a manner that makes sense for your organization. For example, you might create a view that includes only the training rooms 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.

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.



Public Views Window

2. Click **New**. The View dialog box opens. The **View** tab is the active tab.



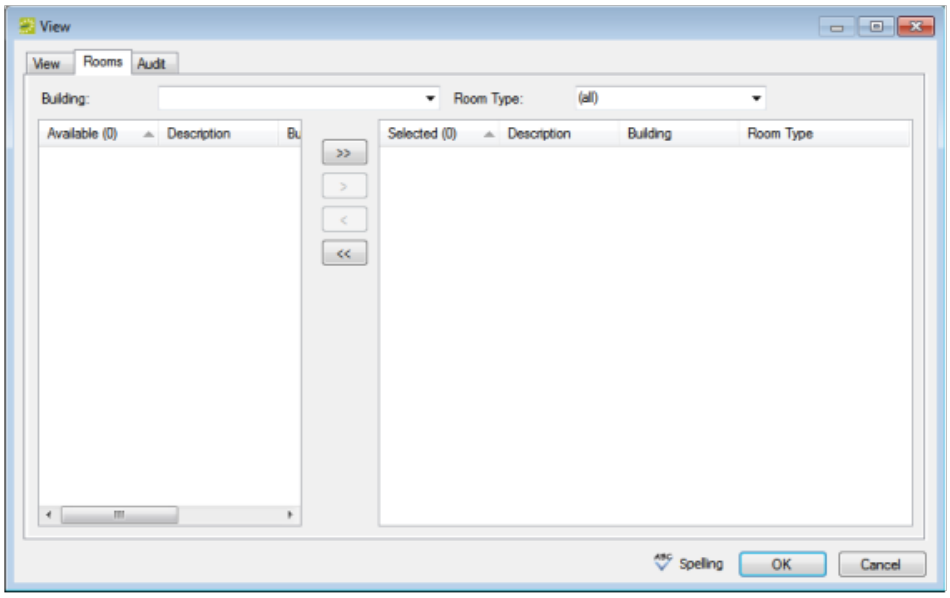
View Tab of the View Dialog

Note:

In the **Description** field, enter a name or description for the new view (maximum 50 characters, including spaces).

In the **Notes** field, you can enter any other pertinent information about the view. If you want EMS Web App users to have read-only access to the view, select **Available to Everyday Users**.

3. Open the **Rooms** tab.



Rooms Tab of the View Dialog

4. Enter any combination of the following search criteria:
   - On the **Building** drop-down 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 listed, you can configure it. See Configuring Buildings, Configuring Areas, or Configuring Public Views.
   - On the **Room Type** drop-down list, select a specific room type. If the appropriate room type is not listed, you can configure it. See Configuring Room Types.
5. On the **Available** list, select the room (CTRL-click to select multiple rooms) you want included in the view, and then Move (>) to the Selected list.

> **Note:**
> You can click **Spelling** to spell check the view description before you save the view.

6. Click **OK**. To return to the Public Views window where your newly configured view is now listed.

CHAPTER 34: Configuration > 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 like soda and coffee, the Entrees grouping might contain resources like fish and beef.

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 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 production 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 an EMS Web App user must make a selection for the resource.

The following topics provide more information about configuring resources in the EMS Desktop Client:

- Categories, Resources, Services - What's the Difference
- Configure Resources for a Category
    - Resource Configuration Wizard

- Import Resources for a Category
- Define Resource Selections and Selection Items
- Configure Services for a Category
- Configure Groupings for a Resource
- Define Production Areas and Production Items for a Catering Resource
- Configure Pricing for a Resource in the Edit Pricing Window
- Export Pricing Information for a Resource

See Also: Configure Categories

CHAPTER 35: Categories, Resources, and Services: What's the Difference?

In EMS Desktop Client, you might think the terms category, resource, and service can be used interchangeably; however, these terms are different concepts.

A *category* in EMS is anything you might add to a booking, such as catering, audio visual, furniture, security, notes, attendee names, or agendas. When you configure a category, however, you must select one of the following six category types:

- Activities
- Attendees
- Catering
- Notes
- Resources with Service Orders
- Resources without Service Orders

These category types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it, and there is nothing for a user to "select" from these types of services.

By contrast, a *service category* that has a type of catering, resource with service order, or a resource without a service order category, will require the EMS Administrator to create items under it. For example, an AV Equipment service category (configured as a *Resource without a Service Order Category* type) might have items under it, such as a flip chart or whiteboard. The user requesting the service for this meeting would select AV Equipment, and then the user might select options, such as flip chart and whiteboard, to add to the event.

Note:
The following category types allow Production Items: Catering, Resources with Service Orders, and Resources Without Service Orders.

Note:
A Category can be configured to Use States so that when a service is requested with a meeting, the service can be managed through a review and approval process in the Manage Services toolbar option in EMS Desktop Client.

See Also:

- Configure Categories
- Configure Resources for a Category
- Configure Services for a Category
- Configure Groupings for a Resource

CHAPTER 36: Configure 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.

Important!

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 only configure resources for service categories.

This topic provides information to (tabs accessed through **Configuration** > **Resources** > select a category > **New**):

- Configure Resources for a Category (Resource tab)
- Assign Calculations to a Resource (Calculations tab)
- Configure Pricing for a Resource (Pricing tab)
- Associate an Image with a Resource (Images tab)
- Edit Production Items for a Resource (Production Items tab)
- Exclude Rooms for a Resource (Excluded Rooms tab)
- Create a Package for a Resource (Package Items tab)

Note:

You can use the Resource Configuration Wizard to configure multiple resources that have common properties, such as grouping, account, and EMS Web App settings

Configure Resources for a Category

To configure resources for a category, complete the following steps:

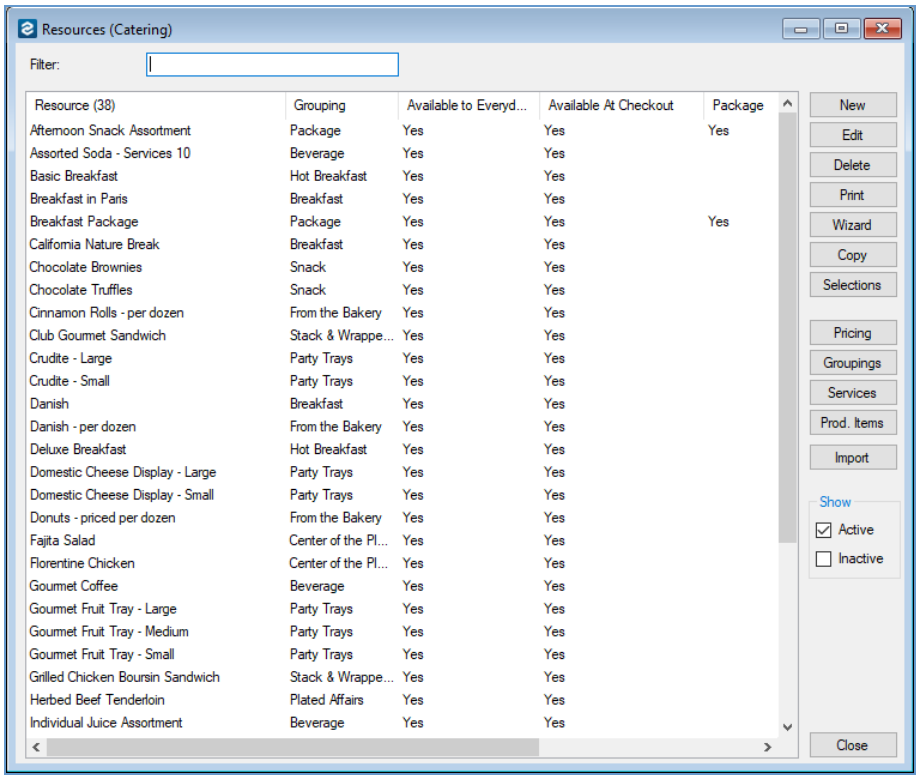
Note:

You must configure a category prior to configuring the resources for that category. See Configure Categories for more information.

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 listed, you can configure it.

2. Select the category for which you are configuring the resources. The Resources window opens. This window lists all of the resources that are currently configured in your EMS database for the selected category and that have a status of **Active**.
   - 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 (not case-sensitive, but characters must be in exact order).

> **Note:**
> 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).

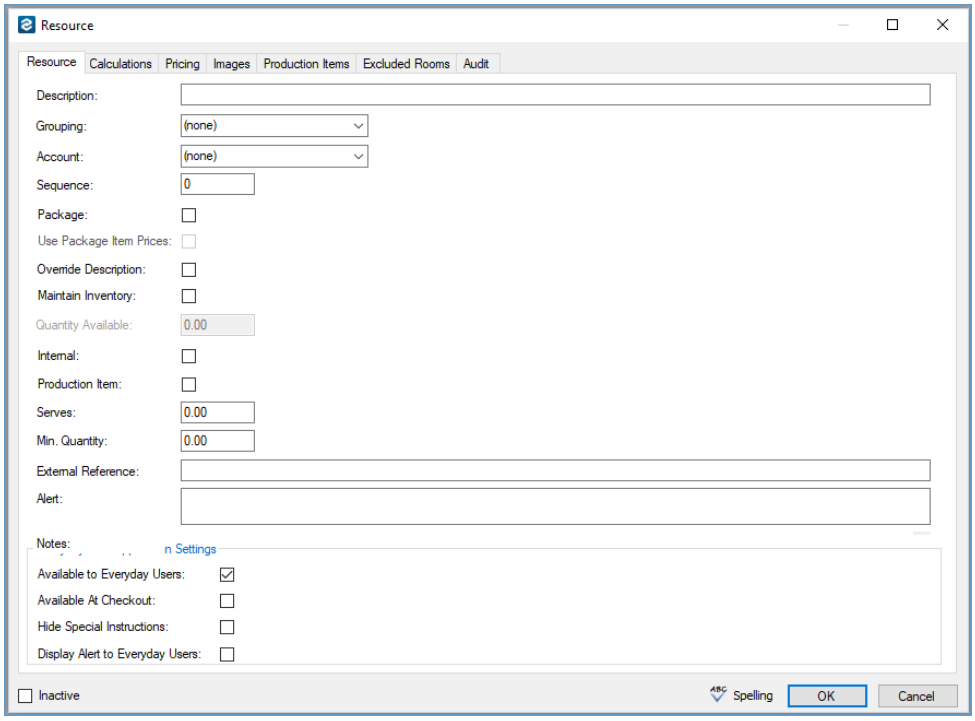


Resources Window

Note:

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, and click **Copy**.

3. From the Resources dialog box, click **New**. The Resource dialog box opens.



Resource Tab on the Resource Dialog Box

4. 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 Desktop Client. 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.

Field	Description
	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.
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.
Sequence	Enter a number that determines the order in which the resource is displayed in a list with other resources in either EMS Desktop Client or EMS Web App. 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 Also: Create a Package for a Resource.
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. See Also: Configure Pricing for a Resource.
Override Description	Select this option to allow your EMS users to edit the description when they are adding it to a booking.

Field	Description
	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 when 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.
Production Item	Available only if the category to which you are adding the resource has been designated as using production items. Select this option if this resource item is to be a production item. See Also: Define Production Areas and Production Items for a Catering Resource and Edit Production Items.
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 Desktop 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 EMS Web App are printed on confirmations and the Setup Worksheet report.

Field	Description
EMS Web App Settings	
Available to Everyday Users	To have this resource be an available option for EMS Web App users who select this category, leave **Available on Web** selected. **Note:** Not available if **Override Description** is selected (see Override Description above).
Available at Checkout	Select this option if you want the resource to be displayed on the "checkout" page (the last page in the Room Request process) in EMS Web App. **Note:** Not available if **Available to Everyday Users** is not selected.
Hide Special Instruction	Do not show any special instructions for the resource in EMS Web App.
Display Alert to Everyday Users	If an alert has been configured for the resource, then display this alert when a user adds this resource to a booking in EMS Web App.

Note:
You can click **Spelling** to spell check the information that you entered for the resource before you save it.

5. You can continue to one or more of the subsequent procedures in this topic to further configure the resource:
   - Assign Calculations to a Resource
   - Configure Pricing for a Resource
   - Associate an Image with a Resource
   - Edit Production Items for a Resource
   - Exclude Rooms for a Resource
   - Create a Package for a Resource

   Once you have finished configuring the resource, click **OK** to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

After you have configured the resource, you can do the following:

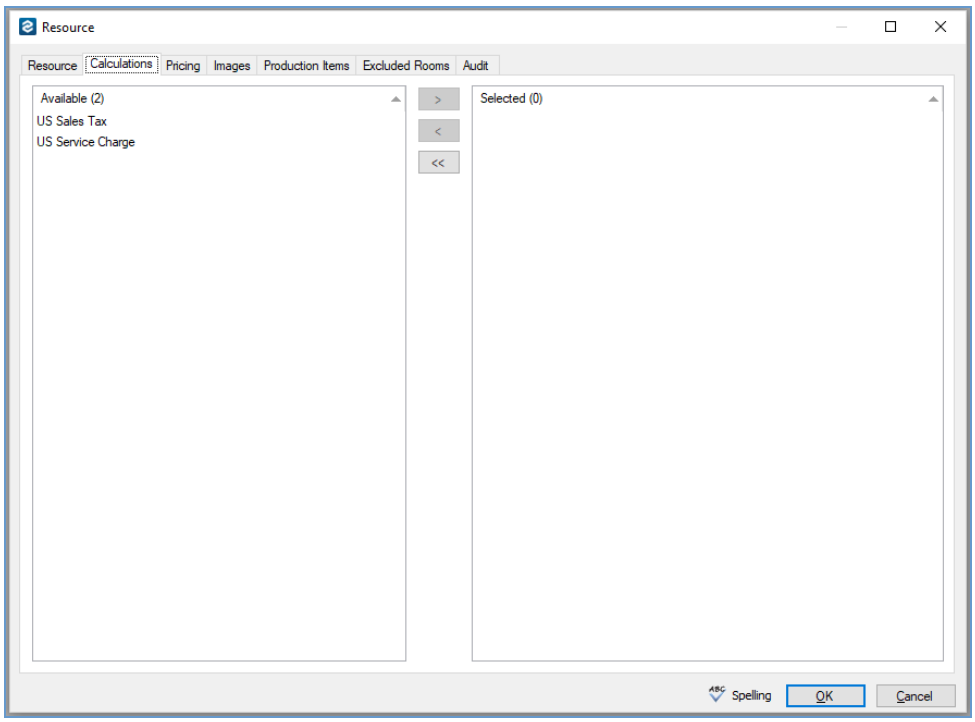
- If this is the first time that you have configured resources for the category, and the category is **Catering** or **Resources, w Service Orders**, you must also configure at least one default service type.
- You can define production items for the resource and/or define selections for the resource.

Assign Calculations to a Resource

> **Note:**
> You can assign calculations at the category level, too. 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.

From the **Calculations** tab on the Resource dialog box, you can assign calculations to a resource as follows:

1. If needed, open the Resource dialog box , and then open the **Calculations** tab.



Calculations Tab on the Resource Dialog Box

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 Configure Calculations.

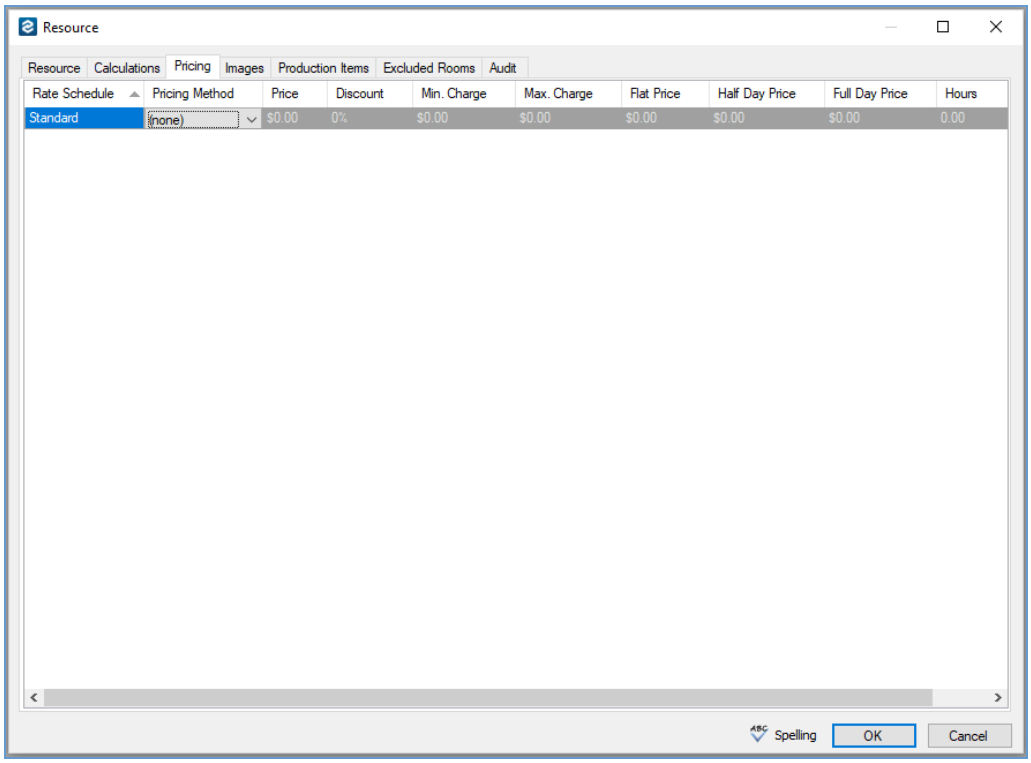
3. Continue with any other optional configuration for the resource as needed; otherwise, click **OK** to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

Configure Pricing for a Resource

> **Note:**
> You can also configure the resource price on the Edit Pricing window or when you are configuring rate schedules.

From the **Pricing** tab on the Resource dialog box, you can configure pricing for a resource as follows:

1. If needed, open the Resource dialog box, and then open the **Pricing** tab.



Pricing Tab on the Resource Dialog Box

2. For each rate schedule, select the rate schedule row and then click in the Pricing Method field and select the pricing method from the drop-down list. The pricing method determines the cost for

reserving the resource (see the following table). If the appropriate rate schedule is not available, you can configure it.

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.
Half Day/Full Day (Service Time)	The total number of hours for the *service 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 service time 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 service time is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item. **Note:** This pricing method is only available for a resource with a service order.
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.

Pricing Method	Description
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. **Note:** This pricing method is only available for a resource with a service order.
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.
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).

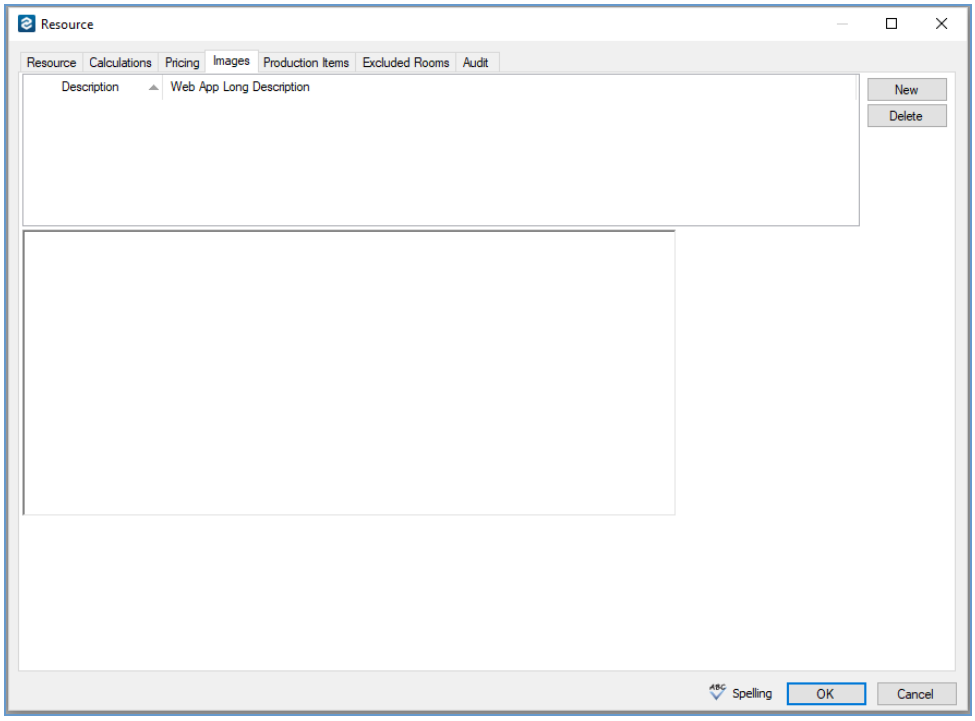
Field	Description
Half Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the resource price for a booking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

Associate an Image with a Resource

From the **Images** tab on the Resource dialog box, 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 EMS Web App. They are not displayed in the EMS Desktop Client.

1. If needed, open the Resource dialog box, and then open the **Images** tab.



Images Tab on the Resource Dialog Box

2. To display an image of the resource in the EMS Web App interface, click **New** to open the Find Image dialog box, and then browse to and select the image and click **Open**. 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.

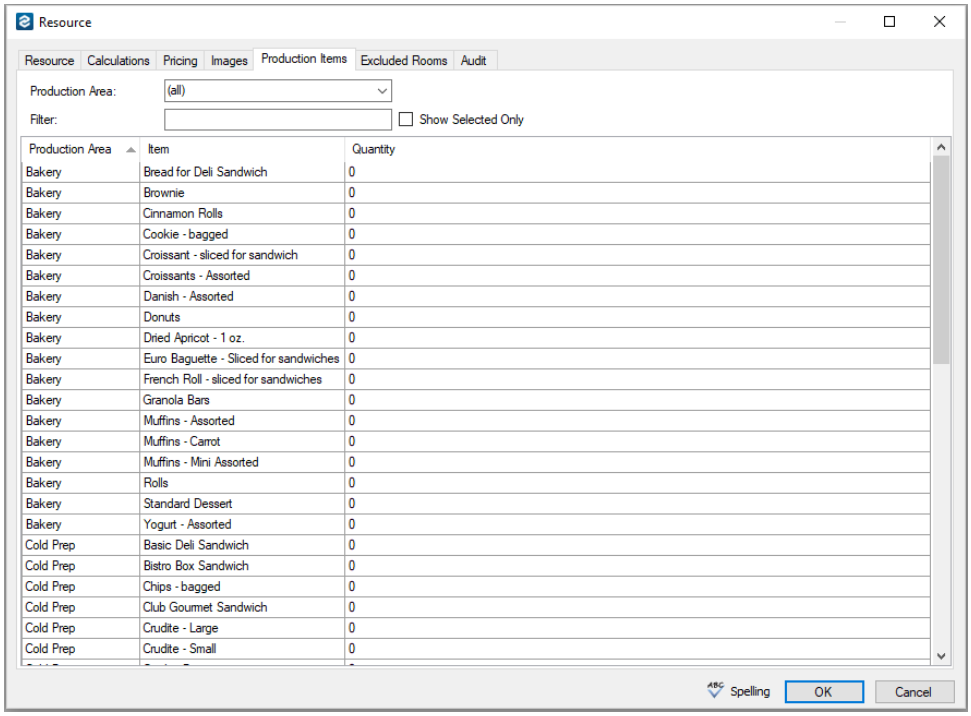
Edit Production Items for a Resource

The **Production Items** tab lists all the production items that have been defined in your EMS database (see also: Define Production Areas and Production Items for a Catering Resource).

Note:

The **Production Items** tab is available only if you did NOT select Production Item on the **Resource** tab when you were configuring the resource.

1. If needed, open the Resource dialog box, and then open the **Production Items** tab.



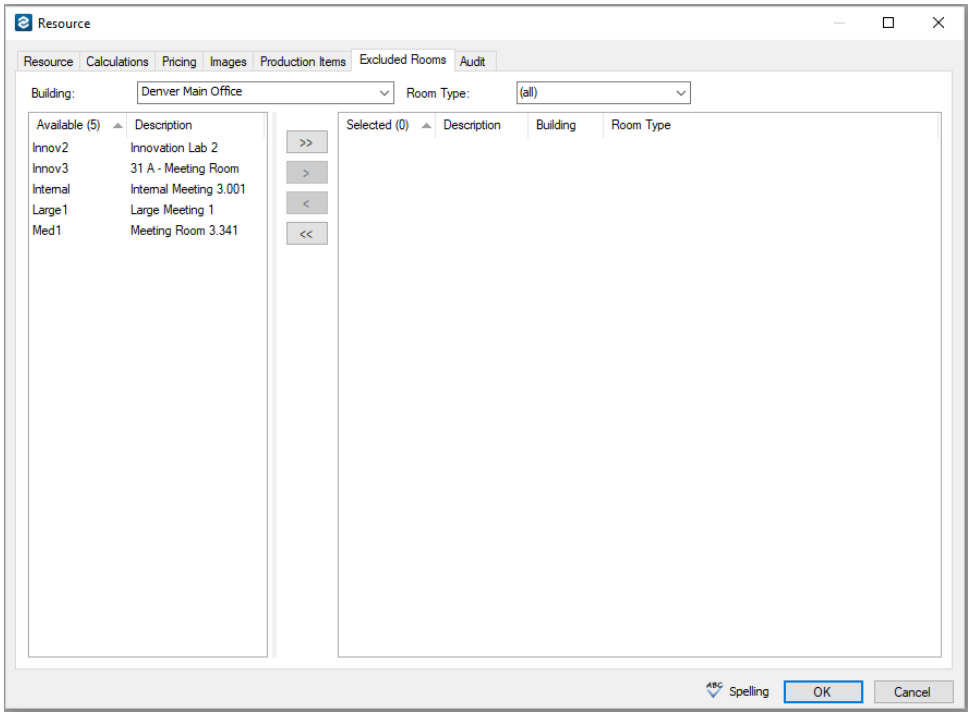
Production Items Tab on the Resource Dialog Box

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.
   - 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.

Exclude Rooms for a Resource

This feature prevents a resource from being allocated for a specific room.

1. If needed, open the Resource dialog box, and then open the **Excluded Rooms** tab.



Excluded Rooms Tab on the Resource Dialog Box

2. Select the search criteria to search for the excluded rooms.
   - **Building**
   - **Room Type** — leave the default value of **(all)**, or select a specific room type.
3. On the **Available** list, select the room (CTRL-click to select multiple rooms) from which the resource item is to be excluded, and then Move (>) 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.

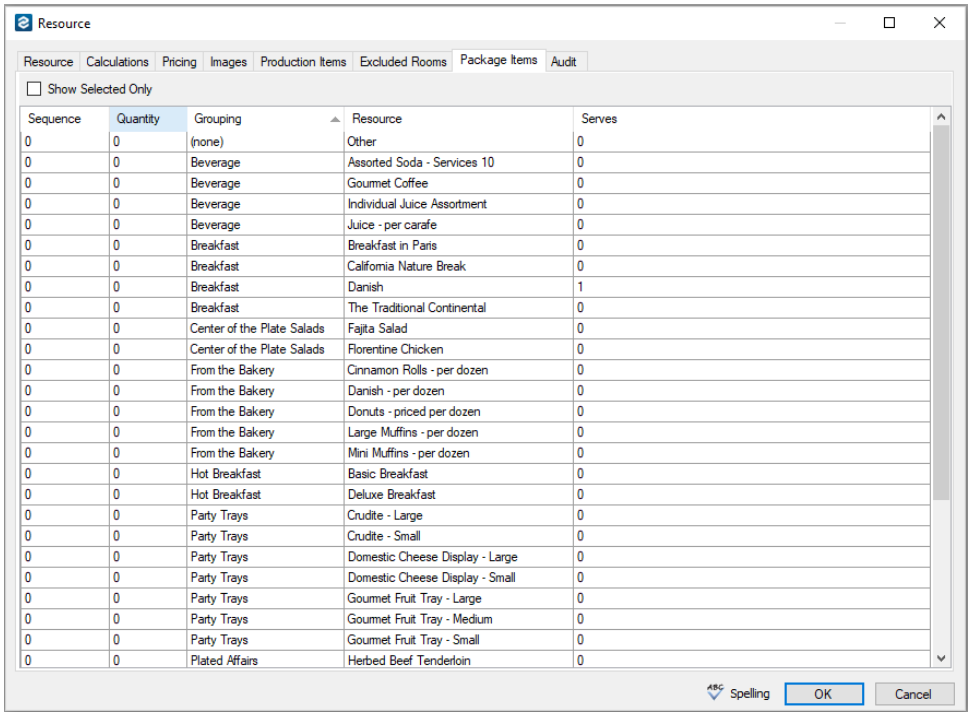
Create a Package for a Resource

A package is a group of resources. You can combine a list of related resources into a package to streamline booking. 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 on 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.

Note:

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, and then open the **Packaged Items** tab. The tab displays all the resources that have been configured for the selected category.



Sequence	Quantity	Grouping	Resource	Serves
0	0	(none)	Other	0
0	0	Beverage	Assorted Soda - Services 10	0
0	0	Beverage	Gourmet Coffee	0
0	0	Beverage	Individual Juice Assortment	0
0	0	Beverage	Juice - per carafe	0
0	0	Breakfast	Breakfast in Paris	0
0	0	Breakfast	California Nature Break	0
0	0	Breakfast	Danish	1
0	0	Breakfast	The Traditional Continental	0
0	0	Center of the Plate Salads	Fajita Salad	0
0	0	Center of the Plate Salads	Florentine Chicken	0
0	0	From the Bakery	Cinnamon Rolls - per dozen	0
0	0	From the Bakery	Danish - per dozen	0
0	0	From the Bakery	Donuts - priced per dozen	0
0	0	From the Bakery	Large Muffins - per dozen	0
0	0	From the Bakery	Mini Muffins - per dozen	0
0	0	Hot Breakfast	Basic Breakfast	0
0	0	Hot Breakfast	Deluxe Breakfast	0
0	0	Party Trays	Crudite - Large	0
0	0	Party Trays	Crudite - Small	0
0	0	Party Trays	Domestic Cheese Display - Large	0
0	0	Party Trays	Domestic Cheese Display - Small	0
0	0	Party Trays	Gourmet Fruit Tray - Large	0
0	0	Party Trays	Gourmet Fruit Tray - Medium	0
0	0	Party Trays	Gourmet Fruit Tray - Small	0
0	0	Plated Affairs	Herbed Beef Tenderloin	0

Package Items Tab on the Resource Dialog Box

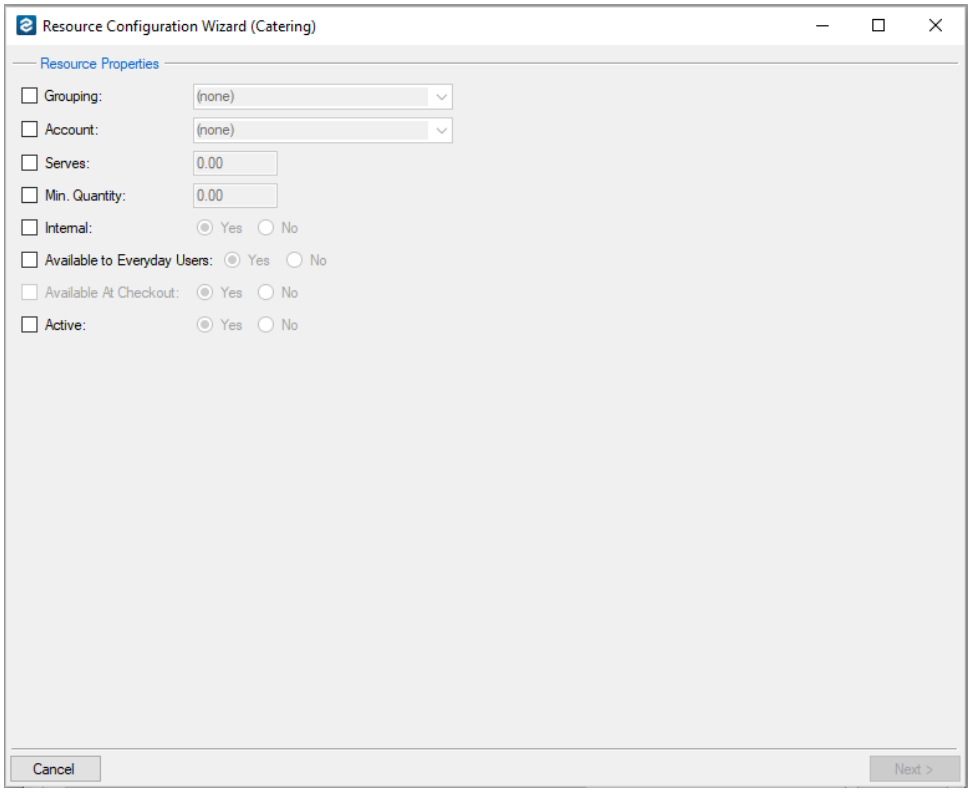
2. Optionally, to filter the display, click **Show Selected Only**. Only those resource items that have previously been selected to be part of the resource package are displayed.
3. For each resource item that is to be included in the package, double-click in the Quantity field, and then enter the appropriate 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.

CHAPTER 37: 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 grouping, account, and EMS Web App 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 use the Resource Configuration Wizard to configure multiple resources, complete the following steps:

1. On the EMS menu bar, click **Configuration** > **Resources**. A list opens of all the categories that are currently configured in your EMS database and for which you can configure resources.
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**.
3. Click the **Wizard** button on the Resource window. The Resource Configuration Wizard opens.



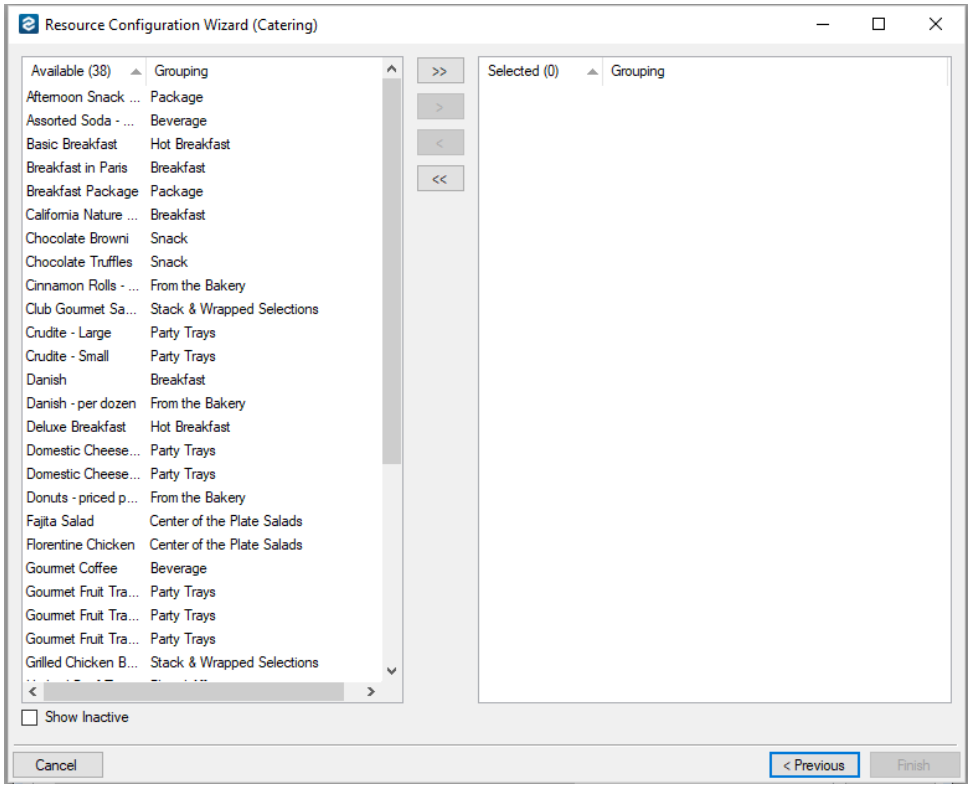
Resource Configuration Wizard

4. 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 Configure Groupings for a Resource.
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.
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 to Everyday Users	If these resources must be available for EMS Web App users who select this category, select this option, and then leave **Yes** selected. To remove these resources as an option for EMS Web App, 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 EMS Web App, then select this option, and then leave **Yes** selected. Tor remove these resources from the “checkout” page, select **No**.

Field	Description
	Note: Not available if **Available to Everyday Users** 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**.

5. 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.



Resource Configuration Wizard, Second Page

Note:
Optionally, to show all resources for the category that are in your EMS database regardless of status, under Show, click **Inactive**.

6. 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.
7. Click **Finish**. A message appears indicating that the resource properties were set successfully.
8. Click **OK**. The message and the Resource Configuration Wizard close.



Note:

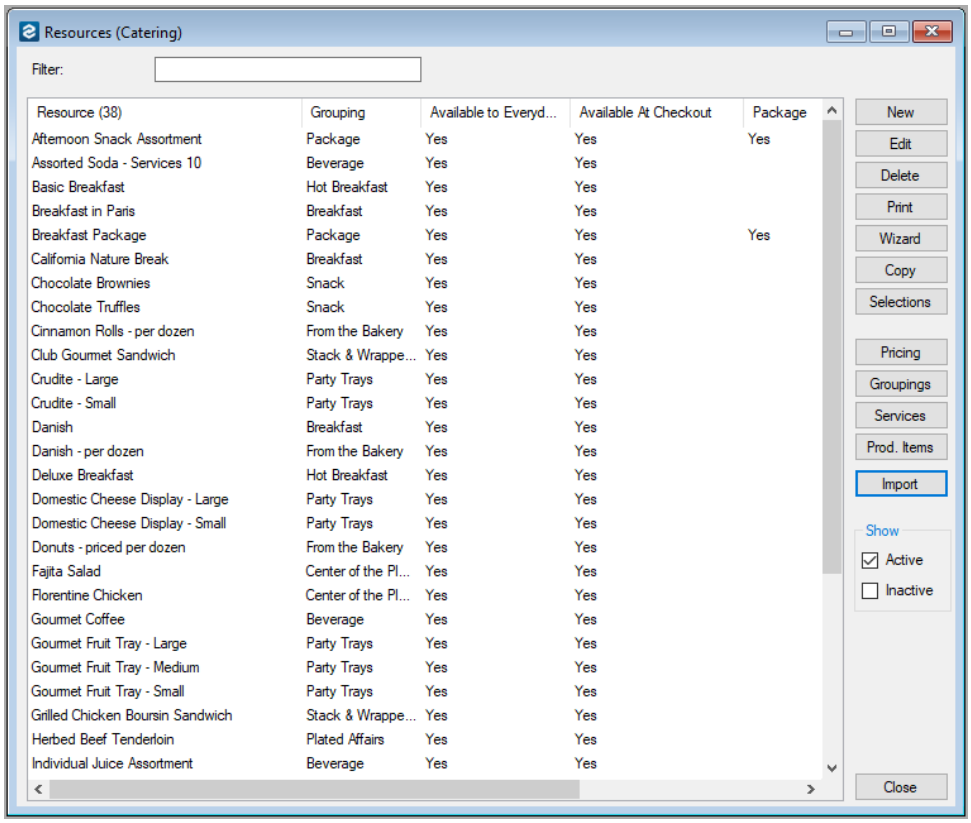
If a resource property, such as pricing, is not available in the Resource Configuration Wizard, you must individually configure that property for the resource. See Also: Configure Resources for a Category.

CHAPTER 38: Import Resources for a Category

You can import resources for a category from a tab-delimited file (see Resource Import File Specifications for the import file specifications). After you import the resources, you can edit their configurations as necessary.

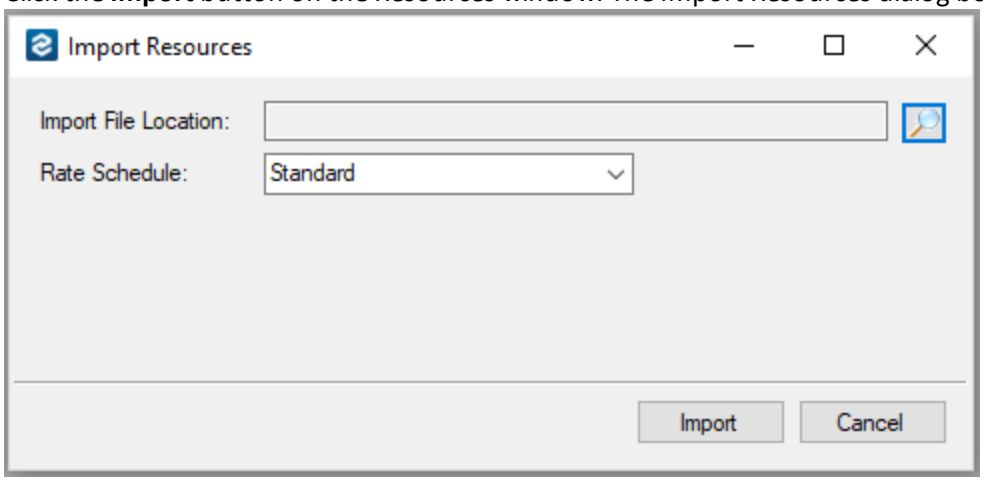
To import resources for a category, complete the following steps:

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**.



Resources Window

3. Click the **Import** button on the Resources window. The Import Resources dialog box opens.



Import Resources Dialog Box

4. Click the **Search** icon to open the Find Resource Import File dialog box, and then browse to and select the resource file that is to be imported (see Resource Import File Specifications for the import file specifications).
5. From the Rate Schedule drop-down list, select the rate schedule that applies to the resource. (See Also: Configure Rate Schedules.)
6. 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.
7. Click **Yes**. A message appears indicating that the import was successful.
8. Click **OK** to close the message and return to the Resources window.

CHAPTER 39: Define 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 Desktop Client user or an EMS Web App user must make a selection for the resource.

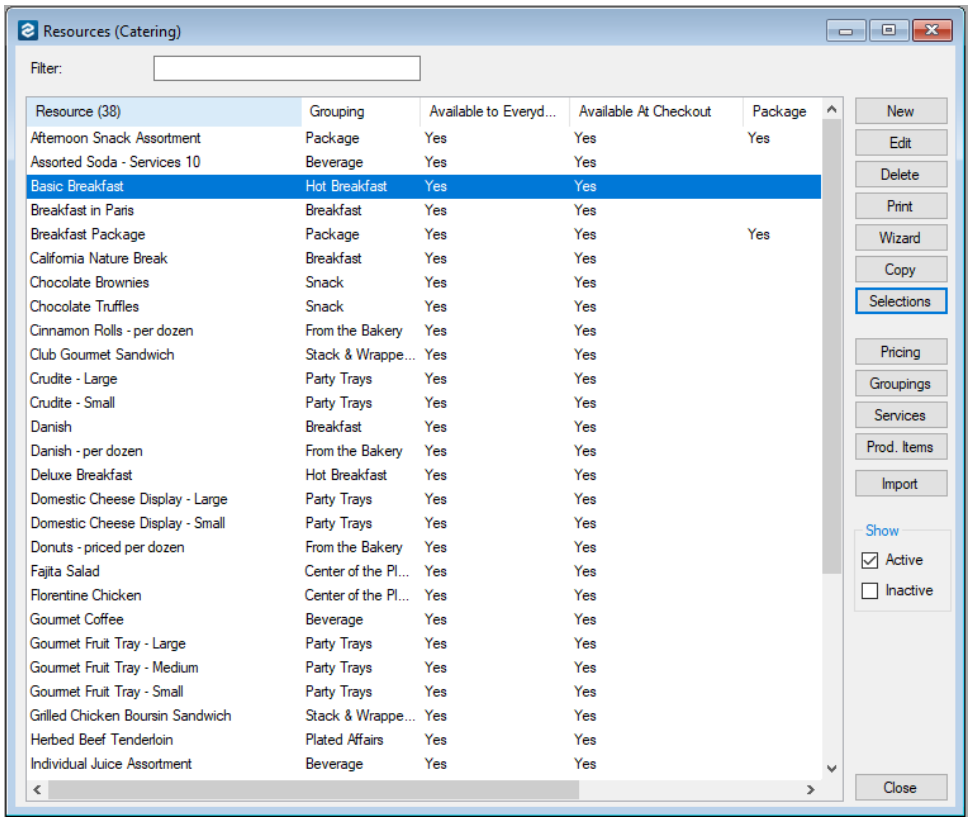
To define resource selections and selection items, complete the following steps:

1. On the EMS menu bar, click **Configuration** > **Resources**. A list opens of all the categories that are currently configured in your EMS database and for which you can configure resources.
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**.
    - 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 (not case-sensitive, but characters must be in exact order).



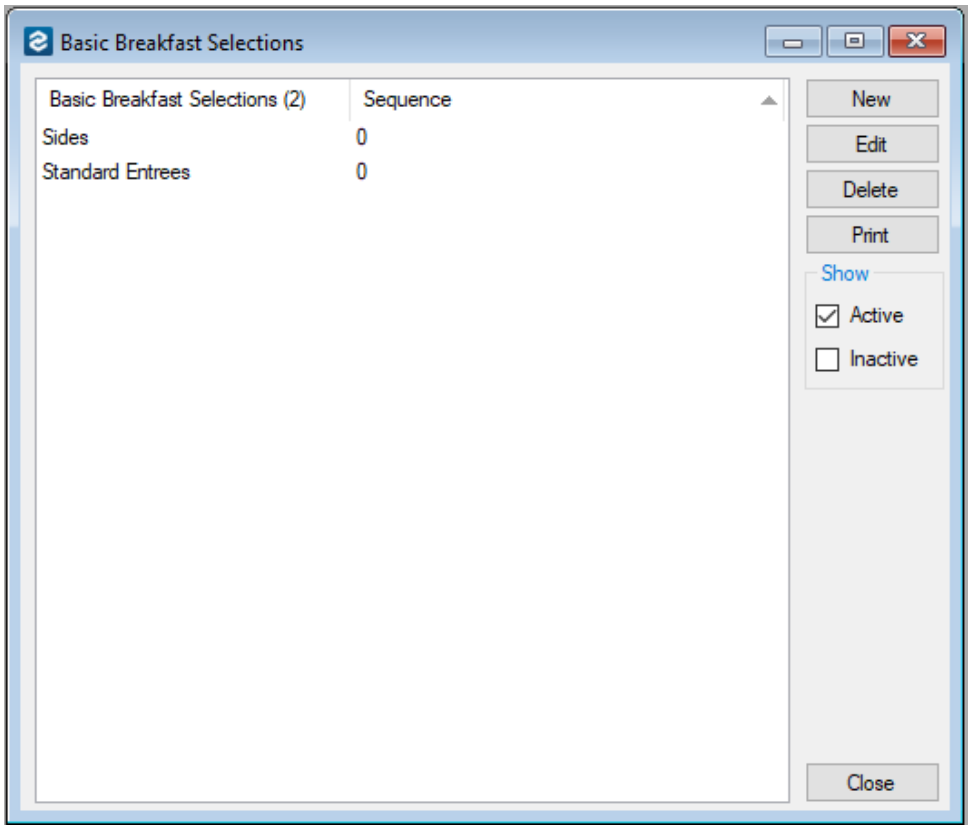
Note:

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).



Resources Window

3. Select the resource for which you are configuring the selections, and then click the **Selections** button. 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**.

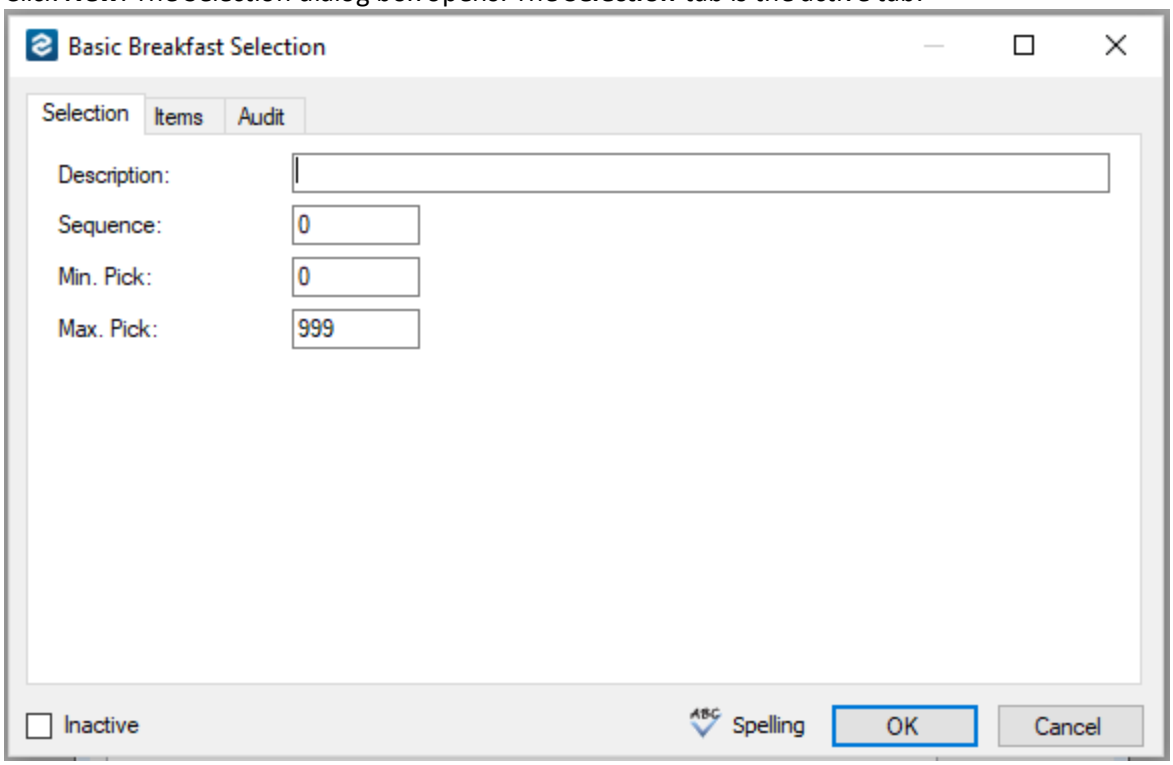


Selections Window

Note:

Optionally, to show all selections for the resource, regardless of status, under Show, click **Inactive**.

4. Click **New**. The Selection dialog box opens. The **Selection** tab is the active tab.



Selection Tab on the Selection Dialog Box

5. In the Description field, enter a description or name for the selection, for example, Breakfast Entrees.

> **Note:**
> The description can be a maximum of 255 characters, including spaces.

6. 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.

> **Note:**
> 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.

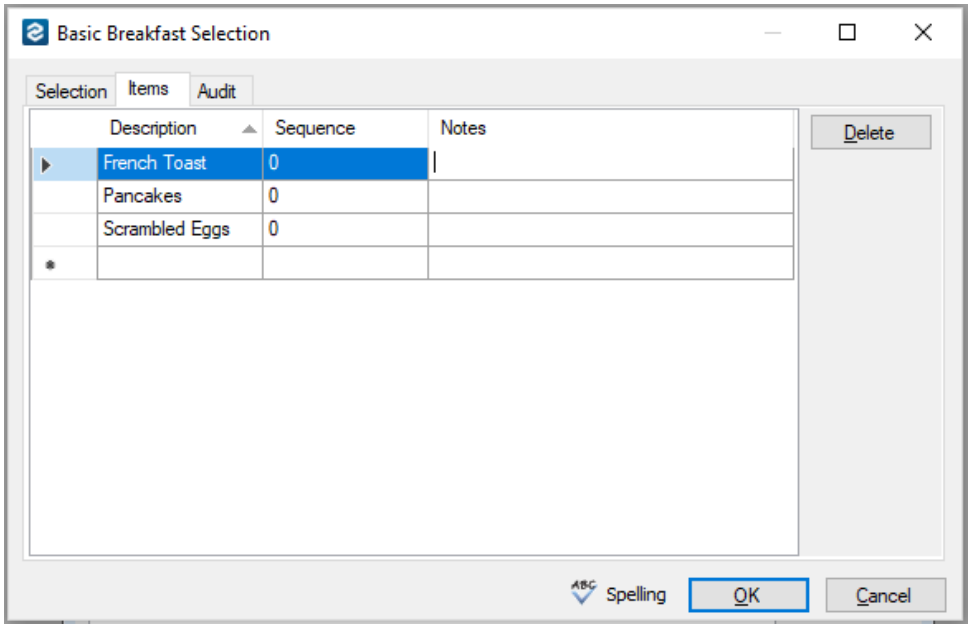
   - In the Min Pick field, enter the minimum number of selection items that a user is required to pick.

- In the Max Pick field, enter the maximum number of selections items that a user is allowed to pick.

> **Note:**
> The maximum pick must be less than or equal to the number of selection items that are configured for the selection.

7. Open the **Items** tab, and in the Description field, enter a description or name for each selection item.

> **Note:**
> The description can be a maximum of 255 characters, including spaces.



Items Tab on the Selection Dialog Box

8. 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.

     Note:
     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.
9. Click **OK**. You return to the Selections window with the newly configured resource selection automatically selected.

CHAPTER 40: Configure Services for a Category

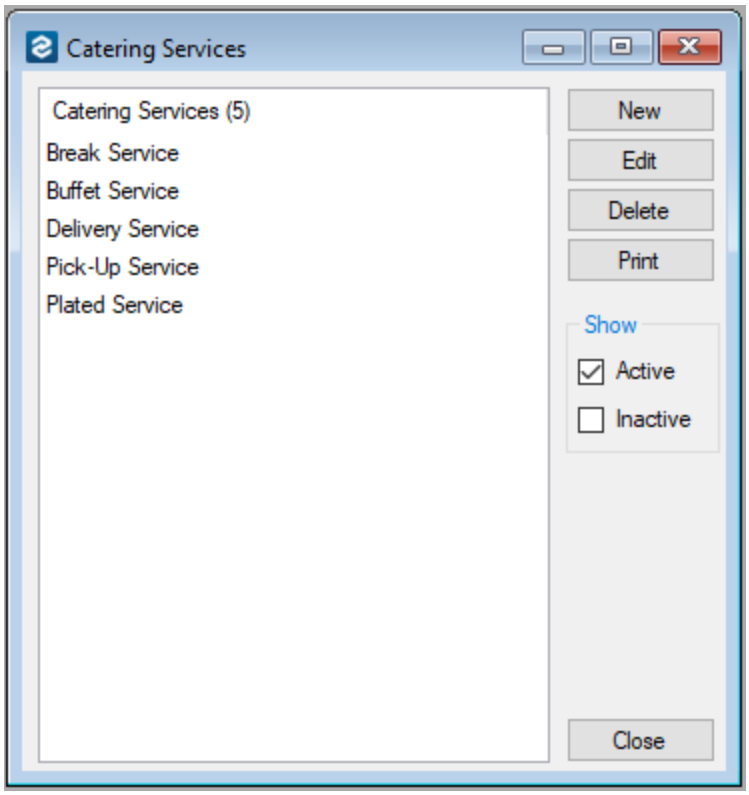
When your users are adding details to a booking, if they select a *Catering* category or *Resource, w/ Service Order* category, they must specify a service. A service indicates how the resource is to be used or offered. For example, Delivery and Setup, Cleanup, Plated, and Buffet are possible services for a resource in a Catering category.

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. You can also configure additional services for a category.

See Also: Categories, Resources, and Services: What's the Difference? and Configure Categories

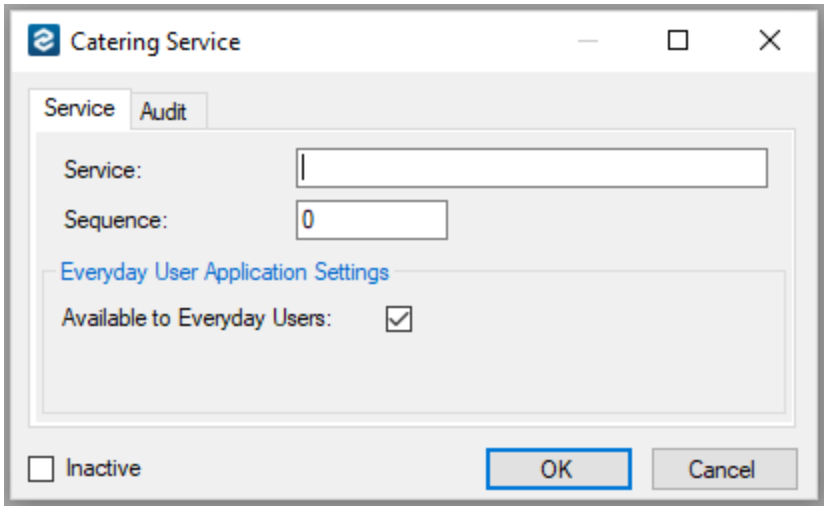
To configure services for a category, complete the following steps:

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 service type. The Resources window opens, listing all the resources that are currently configured in your EMS database for the selected category and that have a status of **Active**.
3. Click the **Services** button on the Resources window. The Services window opens, listing all of the services that are currently configured for the resource in your EMS database and that have a status of **Active**. Optionally, to view only services in your EMS database, regardless of status, under Show, click **Inactive**.



Services Window

4. To begin creating a new Service, click **New**. The Service dialog box opens.



Service Dialog Box

5. Enter the information for the new service type.

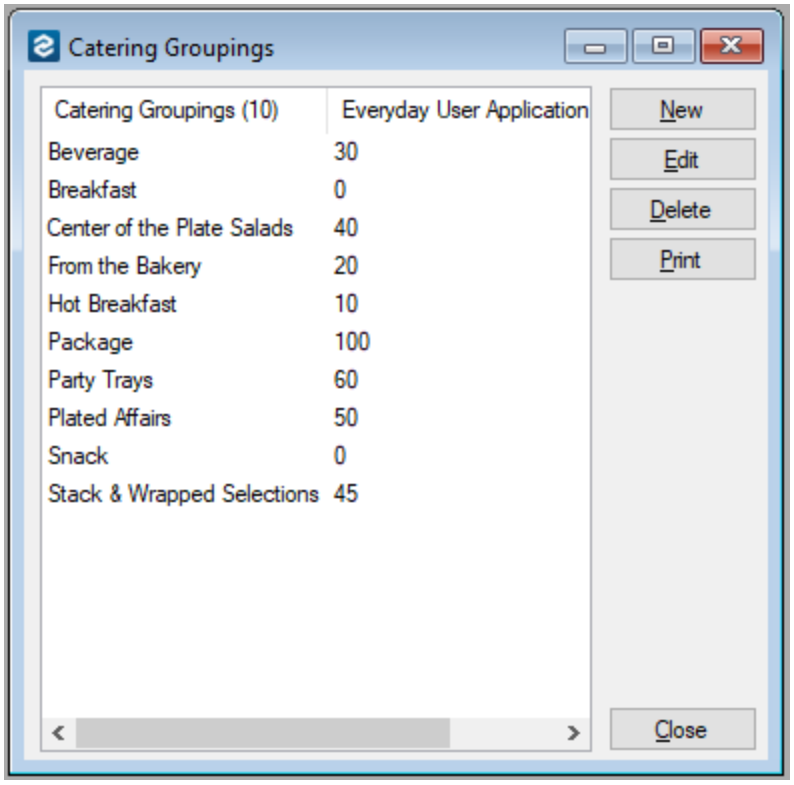
Field	Description
Service	The description or name for the service. The service can be a maximum of 30 characters, including spaces.
Sequence	Enter a number that determines the order in which the service is displayed in a list with other services. Services are ordered from lowest to highest sequence number, 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 to Everyday Users	If this service is to be an available option for EMS Web App users who select this category, leave **Available to Everyday Users** selected.
Inactive	Leave this option blank to add the service as an active service. Select this option to inactivate the service.

6. Click **OK**. The Services dialog box closes. You return to the Services window with the newly configured service automatically selected.
7. Click **OK**. The Services window closes. The Resources window remains open.

CHAPTER 41: Configure Groupings for a Resource

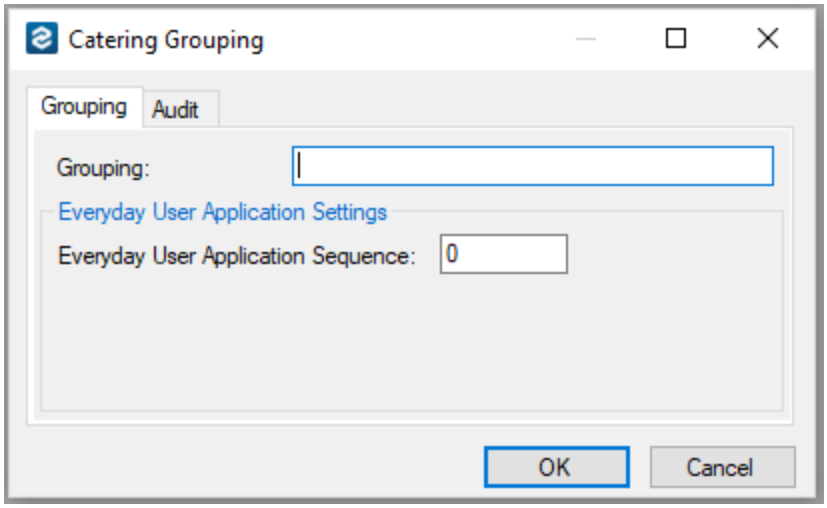
Within a category, you can organize resources by Groupings. For example, you might configure Beverages, Entrees, and Desserts groupings for a Food Service category. The Beverage grouping might contain resources, such as soda and coffee, and the Entrees grouping might contain resources, such as fish and beef. 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.

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 grouping. The Resources window opens and displays all of the resources that are currently configured in your EMS database for the selected category and that have a status of **Active**.
3. Click the **Groupings** button on the Resources window. The Groupings window opens. This window lists all the groupings that are currently configured in your EMS database for the selected category.



Groupings Window

4. Click **New**. The Grouping dialog box opens.



Grouping Dialog Box

5. In the Grouping field, enter a name or description for the new grouping (maximum 50 characters, including spaces).
6. In the Sequence field, enter a number that determines the order in which the groupings are displayed in EMS Web App. 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.
7. Click **OK**. The Grouping dialog box closes. You return to the Grouping window with the newly configured grouping automatically selected.
8. Click **Close**. The Grouping dialog box closes. The Resources dialog box remains open.

See Also: Configure Resources for a Category.

CHAPTER 42: Define Production Areas and Production Items for a Catering 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. The Delicatessen area might produce the sandwich, chips, and bottled water, and the Bakery area might produce the cookies.

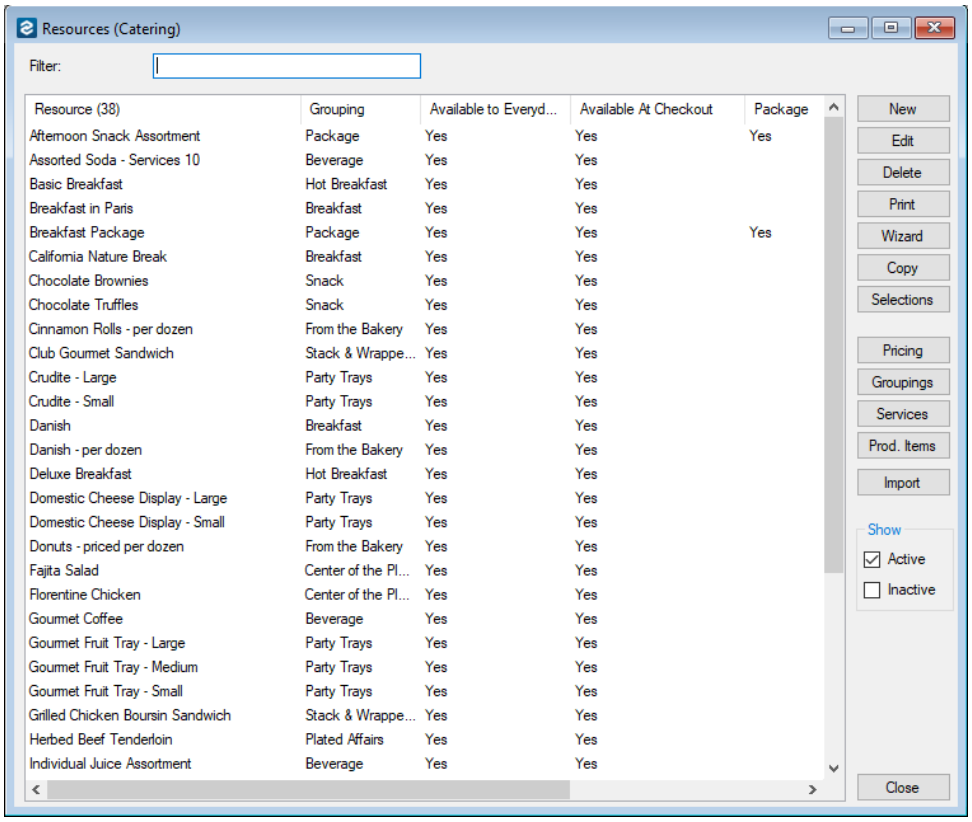
If a category has been defined as using production items, then at the time that you are configuring a resource for the category, you can define the resource as a production item, or you can manually define resources as production items for the category at a later date.

This topic provides information on the following:

- Define a New Production Area
- Define a New Production Item
- View Production Items and Production Areas

Define a New Production Area

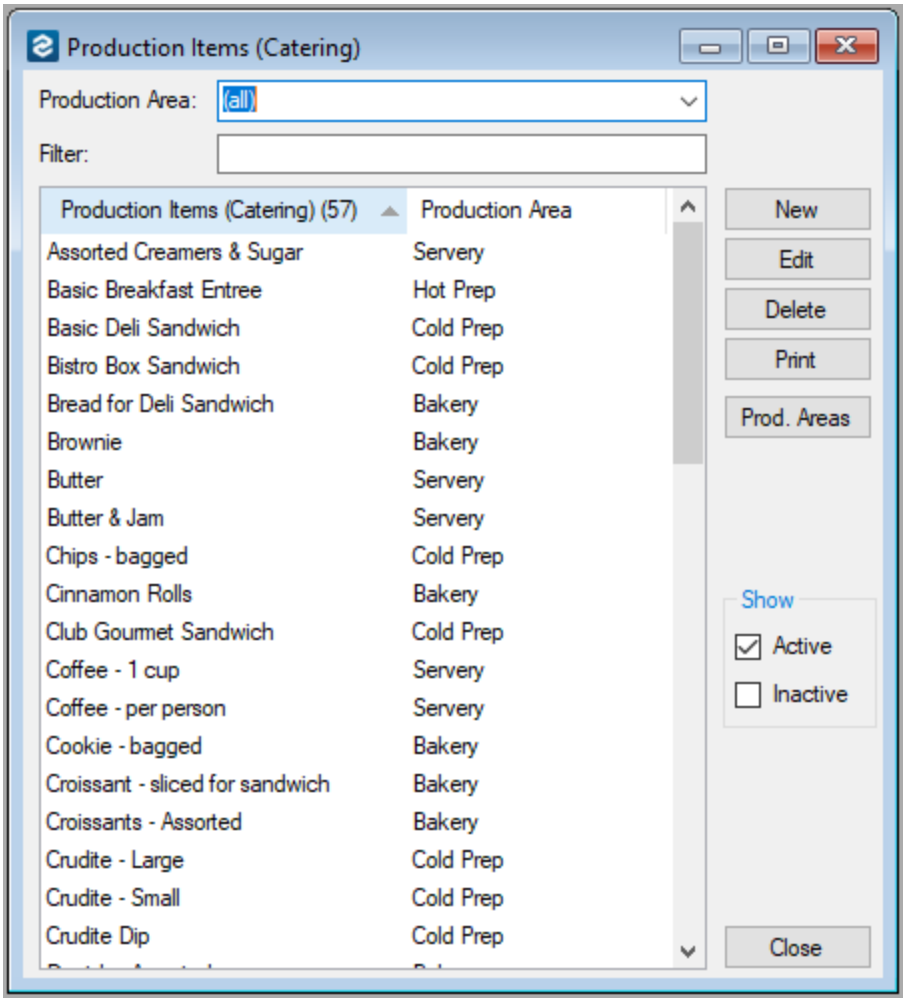
1. On the EMS menu bar, click **Configuration** > **Resources**. The Resources drop-down list contains all of the currently configured categories.
2. From the Resources drop-down list, select a category (typically a catering type resource) for which to define a new production area. The Resources window opens, listing all active resources for the selected category.



Resources Window

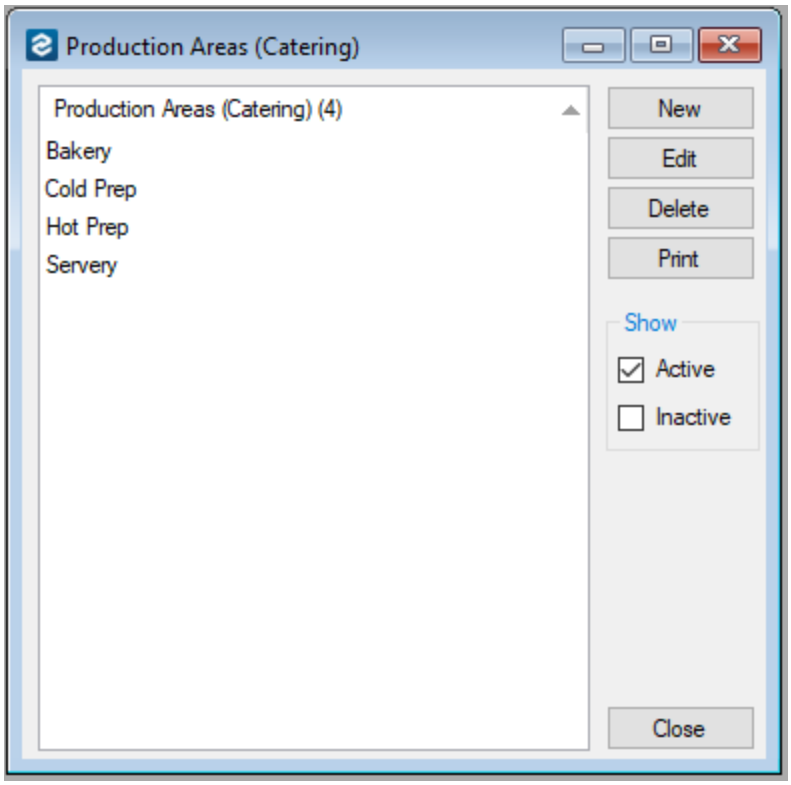
3. Click the **Prod. Items** button on the Resources window. The Production Item window opens.

> **Important!**
>
> The **Prod. Items** button will not be available if the resource category has not been defined to allow Production Items. Only Catering and Resources with or without Service Orders allow Production Items (see Configure Categories).



Production Items Window

4. From the Production Items window, click the **Prod. Areas** button. The Production Areas window opens and lists active Production Areas that have been configured for the selected category and that have a status of **Active**.

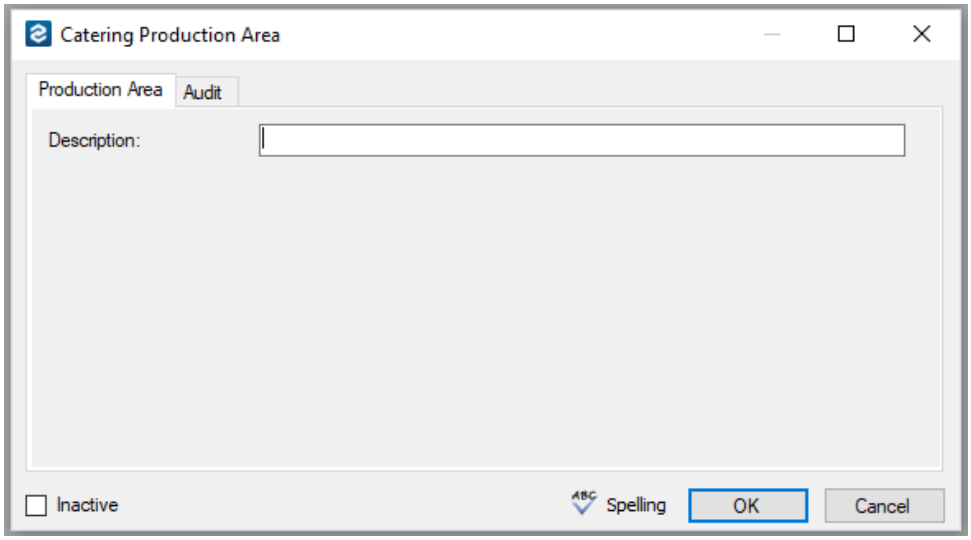


Production Areas Window

Note:

To see all production areas for the category that are in your EMS database regardless of status, under Show, click **Inactive**.

5. Click **New**. The Production Area dialog box opens.

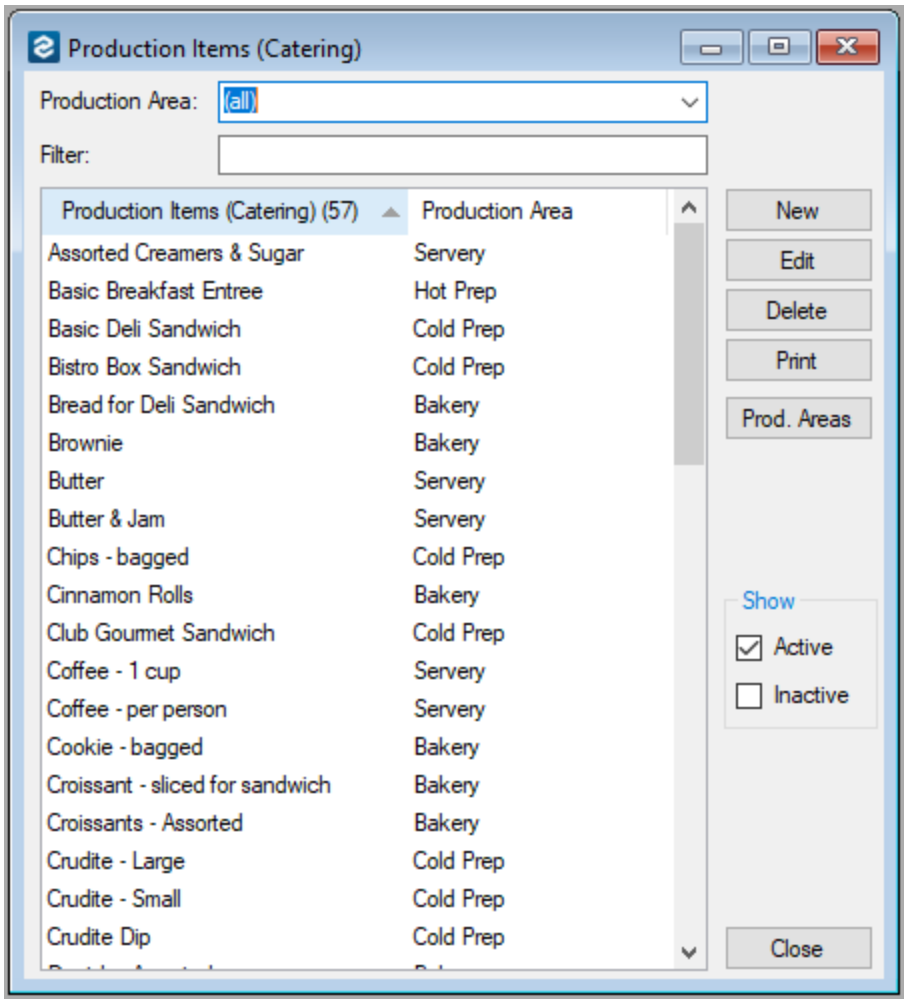


Production Area Dialog Box

6. Enter a description or name for the production area. The description can be a maximum of 50 characters, including spaces.
7. Leave the **Inactive** check box blank to add the production area as an active area. Select the **Inactive** check box to inactivate the production area.
8. Click **Spelling** if you want to spell check the description before you save the production area.
9. Click **OK**. The Production Area dialog box closes. You return to the Production Areas window with the newly configured production area automatically selected.

Define a New Production Item

1. On the EMS menu bar, click **Configuration** > **Resources**. The Resources drop-down list contains all of the currently configured categories.
2. From the Resources drop-down list, select a category (typically a catering type resource) for which to define a new production area. The Resources window opens, listing all active resources for the selected category.
3. Click the **Prod. Items** button on the Resources window. The button will not be available if the resource category has not been defined to allow Production Items. Only Catering and Resources with or without Service Orders allow Production Items (see Configure Categories). The Production Item window opens.



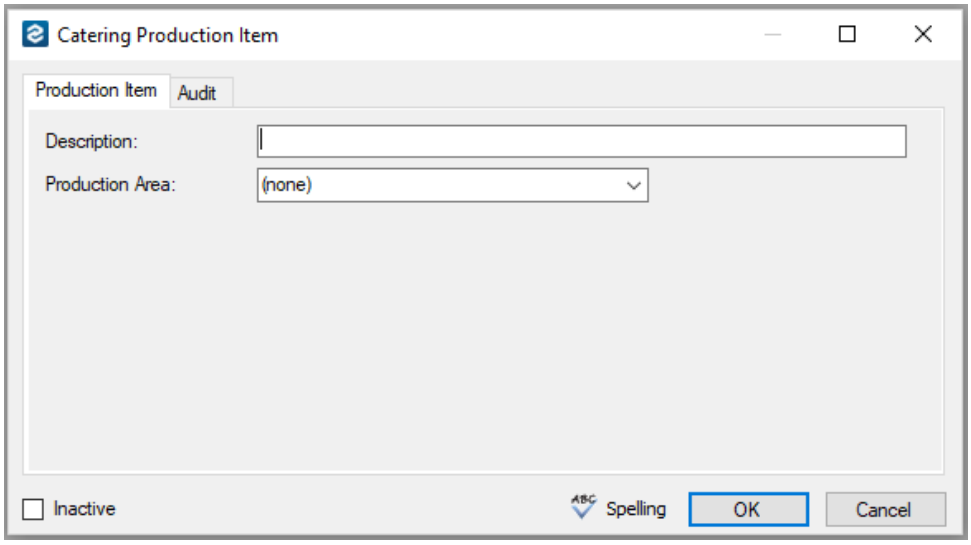
Production Items Window

Note:

You can change which production items are displayed by doing the following:

- To filter the displayed production items based on the Production Area, from the Production Area drop-down list, select a production area.
- To view all production items that have been defined for the category regardless of status, under Show, click **Inactive**.
- To filter the list by item name, in the Filter field, enter a keyword. This search term 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 **New**. The Production Item dialog box opens.



Production Item Dialog Box

5. In the Description field, enter description or name for the production item. The description can be a maximum of 50 characters, including spaces.
6. If you want to select a production area for the item, select a production area from the Production Area drop-down list.
7. Click **OK**. You return to the Production Items window with the newly configured production item automatically selected.
8. Click **Close** on the Production Items window to close the window and return to the Resources window.
9. On the Resources window, select the resource for which you are configuring the production items, and then click **Edit**. The Resource dialog box opens.
10. Open the **Production Items** tab for the resource, and for each appropriate production item, enter the quantity.
11. Click **OK** to close the Resource dialog box and save the resource with its production items.

View Configured Production Items and Production Areas

1. On the EMS menu bar, click **Configuration** > **Resources**. The Resources drop-down list contains all of the currently configured categories.
2. From the Resources drop-down list, click a category (typically a catering type resource) for the production item or area that you want to view. The Resources window opens, listing all active resources for the selected category.

> **Note:**
> To see 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, listing all active production items that have been defined for a category. From the Production Item window, you can view, define, edit, and delete production items.

> **Important!**
> The **Prod. Items** button will not be available if the resource category has not been defined to allow Production Items. Only Catering and Resources with or without Service Orders allow Production Items (see Configure Categories).

> **Note:**
> You can change which production items are displayed by doing the following:
> - To filter the displayed production items based on the Production Area, from the Production Area drop-down list (Production Item window), select a production area.
> - To view all production items that have been defined for the category regardless of status, under Show, click **Inactive** (Production Item .
> - To filter the list by item name, in the Filter field, enter a keyword. This search term 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 **Prod. Areas** to open the Production Areas window. From this window, you can view, define, edit, and delete production areas.

CHAPTER 43: Configure the Pricing for a Resource on the Edit Pricing Window

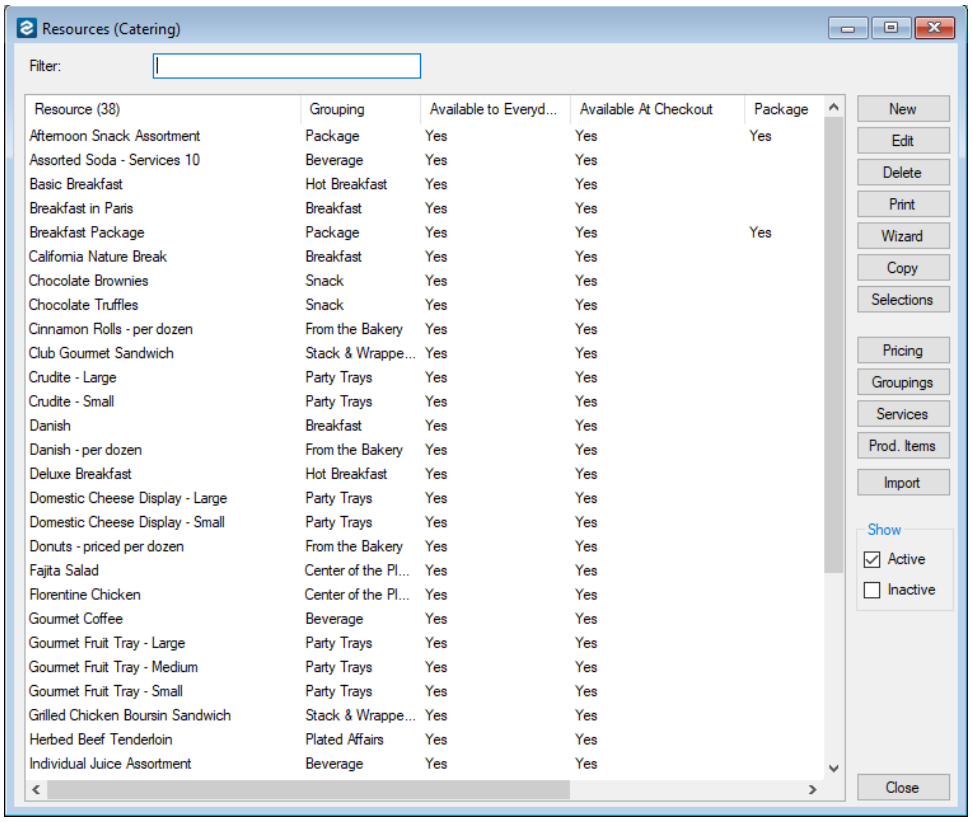
You can configure the pricing for a resource on the **Pricing** tab of the Resource dialog box (see Configure Pricing for a Resource), or you can configure the resource, and then configure the pricing for it at a later date on the Edit Pricing window (as described in this topic).

Note:
You can also configure the resource price at the time that you are configuring rate schedules (see Configure Rate Schedules).

Note:
You can export pricing information that you have configured for a resource on a per rate schedule basis from the Edit Pricing window. See Export Pricing Information for a Resource for more information.

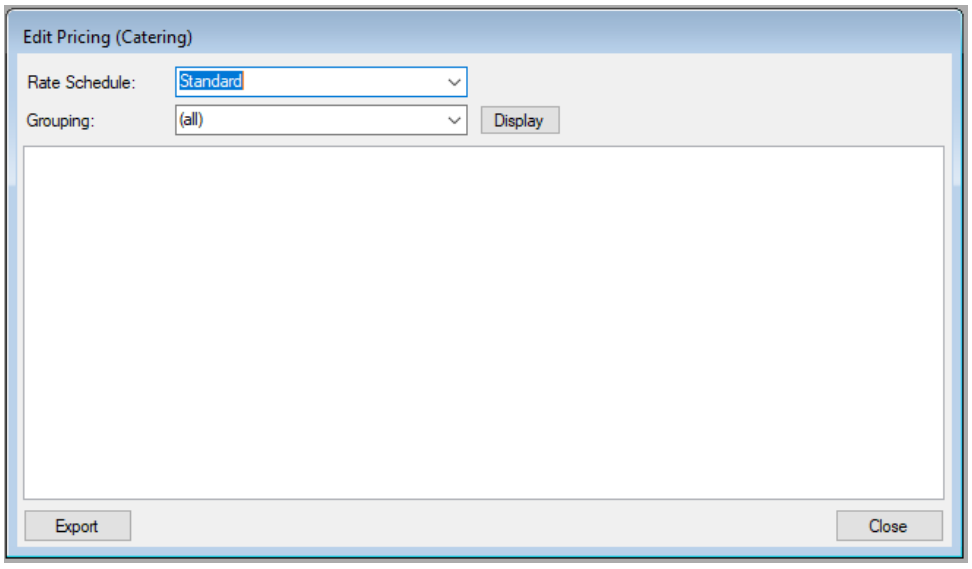
To configure the pricing for a resource on the Edit Pricing window, complete the following steps:

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**.



Resources Window

3. Click the **Pricing** button on the Resources window. The Edit Pricing window opens.



Edit Pricing Window

4. From the Rate Schedule drop-down list, select the rate schedule for which you are pricing the resources.
5. From the Grouping drop-down list, do one of the following:
   - Leave the Grouping drop-down list set to the default value of (all), and then click the **Display** button to display a list of all active resources in all the groupings that have been configured for the selected category.
   - Select a specific grouping from the drop-down list, and then click the **Display** button to display a list of all active resources in the grouping.
6. For each resource, select the pricing method as follows:
   a. Click on a resource to select the row.
   b. Click in the Pricing Method field and select the pricing method from the drop-down list.

   The pricing method determines the cost for reserving the resource (see the following table). If the appropriate rate schedule is not available, you can configure it.

Pricing Method Fields

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.
Half Day/Full Day (Service Time)	The total number of hours for the *service 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 service time 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 service time is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item.

Pricing Method	Description
	Note: This pricing method is only available for a resource with a service order.
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. **Note:** This pricing method is only available for a resource with a service order.
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.

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 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.

Field	Description
Min. Charge Max. Charge	The values 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).

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 resource.

CHAPTER 44: Export Pricing Information for a Resource

You can export any pricing information that you have configured for a resource on a per rate schedule basis from the Edit Pricing window. The information is exported to a Microsoft Excel file.

Note:
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 billable items after you have configured the information for the room or resource. See also: Export Pricing Information for a Room and Export Pricing Information for Billable Items.

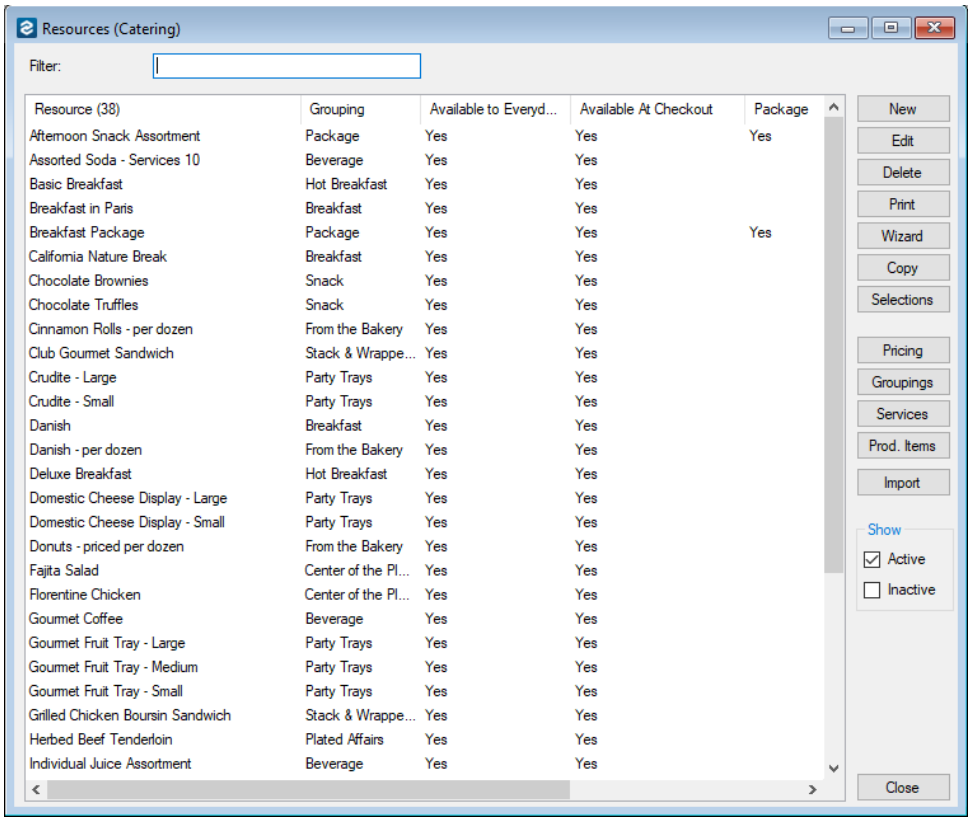
Concept: You Can Assign Rate Schedules to Specific Rooms and Resources.

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:

1. **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.
2. **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.
3. **When 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.

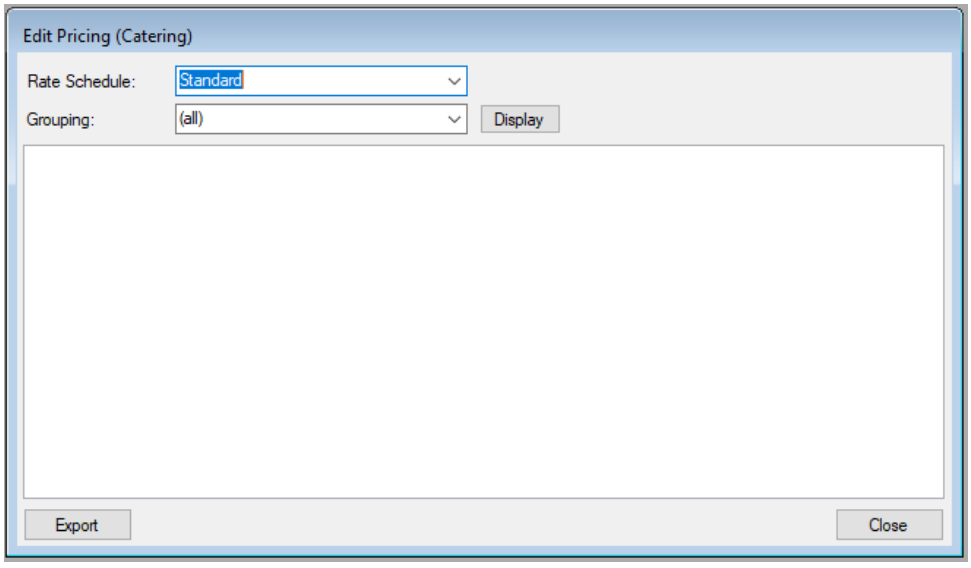
To export pricing information for a resource, complete the following steps:

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 of the resources that are currently configured in your EMS database for the selected category and that have a status of **Active**.



Resources Window

3. Click the **Pricing** button on the Resources window. The Edit Pricing window opens.



Pricing Window

4. From the Rate Schedule drop-down list, select the rate schedule for which you are exporting the pricing information.
5. From the Grouping drop-down list, do one of the following:
   - Leave the Grouping drop-down list set to the default value of (all), and then click the **Display** button to display a list of all active resources in all the groupings that have been configured for the selected category.
   - Select a specific grouping from the drop-down list, and then click the **Display** button to display a list of all active resources in the grouping.
6. Click **Export**. A Save As dialog box opens. The export file is named Pricing.xls by default. You can edit the name of the export file.
7. 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. In the Export Report message window, 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 4 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 resource, click **Close**. The Edit Pricing window closes. The Resources window remains opens.

CHAPTER 45: 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.

Initial configuration for billing in EMS Desktop Client is extensive. If your organization uses EMS for revenue and billing, please consult your Professional Services representative for assistance. Consider configuring your billing information in phases as follows:

- EMS Billing Concepts
- Configure Accounts
- Configure Currencies
- Configure Billing Reference and PO Numbers
- Review and Confirm Group, Room, and Category Configurations (making a note of those you wish to link to billing)
- Configure Payment Types
- Configure Sales Categories
- Calculations
- Pricing Plans
- Configure Rate Schedules
- Confirm Billing Assignments in Group, Room, and Category Configurations

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.

See Also:

- Configure Pricing Plans
- Configure Calculations
- Establish Billing Reference and PO Behavior
- Export Pricing Information for a Resource

- Export Pricing Information for a Room
- Export Pricing Information for Billable Items (Rooms & Resources)

EMS Billing Concepts

This section provides an overview of the following EMS billing concepts:

- Rate Schedules
- Rate Schedules and Billable Items (rooms and resources)
- Calculations
- Pricing Plans

Rate Schedules

A rate schedule is a pricing sheet that lists prices for billable items in your EMS database. For example, if your organization is an academic organization, then at the most basic level, you would 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.

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.

Rate Schedule Example

Four factors affect how pricing is applied for a rate schedule

1. Pricing method (flat rate, hourly rate, and so on)
2. Calculations (taxes, gratuities, and so on)
3. Discount percentage
4. 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. You can assign calculations directly to a category, a group, a group type, a resource, or a room. You can also assign calculations through pricing plans (see Calculations).

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 Also: Configure Rooms and Configure Resources for a Category.)

- **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 Also: Configure the Pricing for a Room on the Edit Pricing Window and Configure the Pricing for a Resource on the Edit Pricing Window.)

- **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 Edit Pricing 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 Also: Configure Rate Schedules.)

Calculations

Calculations are additional charges, such as gratuity or sales tax, that can be applied to billable items (a category, a group, a group type, a resource, or a room). You can apply a calculation to a resource item every time a group uses the item, or you can apply the calculation 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, you must define the calculation 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, you must use pricing plans.

See Also: Configure Calculations

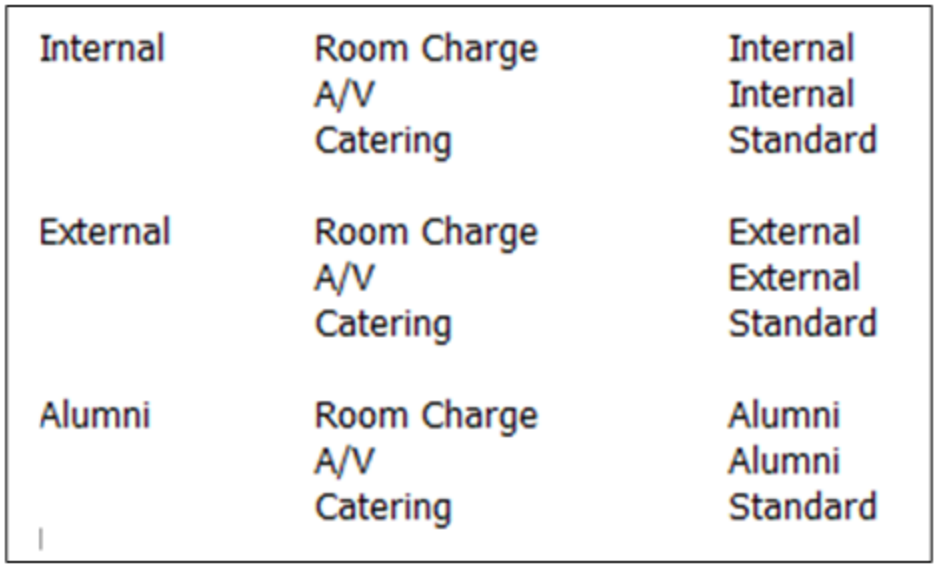
Pricing Plans

A pricing plan bundles rate schedules. When your users apply a pre-configured 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.
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 would configure your pricing plans as shown in the example below.



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

Pricing Plans Example

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 pricing plans listed in the following table.

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	• Alumni

Pricing Plan	Billable Item	Rate Schedule
	• A/V • Catering	• Internal • Standard

A pricing plan is also required to apply calculations correctly to invoiced items. You can apply a calculation to a resource item every time a group uses the item, or you can apply the calculation 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, you must define the calculation 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, 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.

See Also: Configure Pricing Plans

CHAPTER 46: Configure 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. After you configure a rate schedule, you can define the pricing for the billable items (rooms and resources) in the rate schedule.

This topic will include information on the following:

- Configure a Rate Schedule
- Configure Pricing for Billable Items in a Rate Schedule

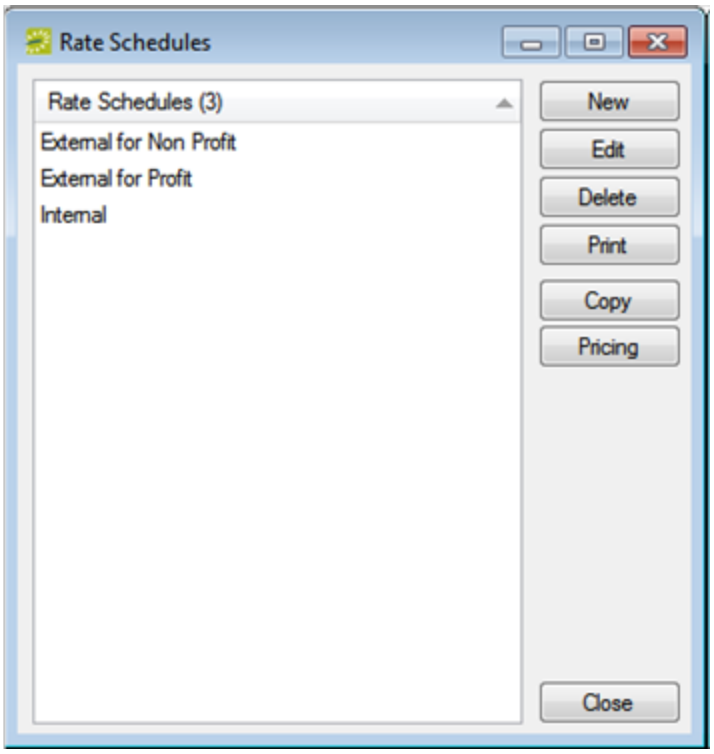
Concept: You Can Assign Rate Schedules to Specific Rooms and Resources.

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 Also: Configure Rooms and Configure Resources for a Category.)
- **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 Also: Configure the Pricing for a Room on the Edit Pricing Window and Configure the Pricing for a Resource on the Edit Pricing Window.)
- **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 Edit Pricing 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 Also: Configure Pricing for Billable Items in a Rate Schedule.)

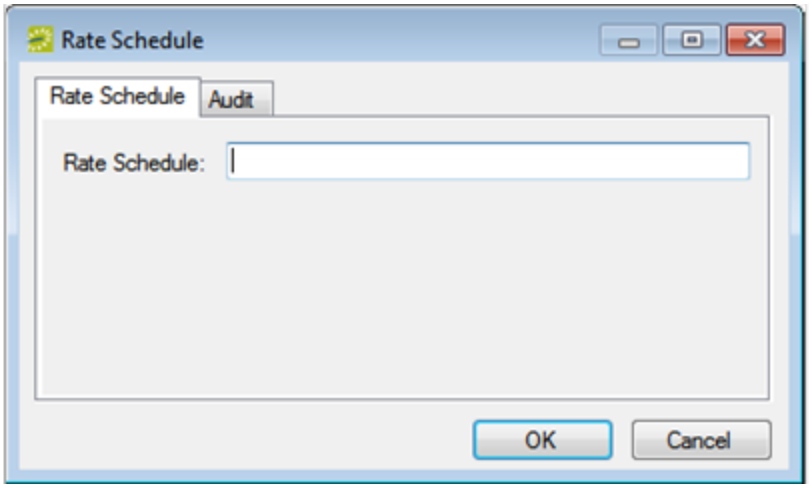
Configure a Rate Schedule

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.



Rate Schedules Window

2. Click **New**. The Rate Schedule dialog box opens.



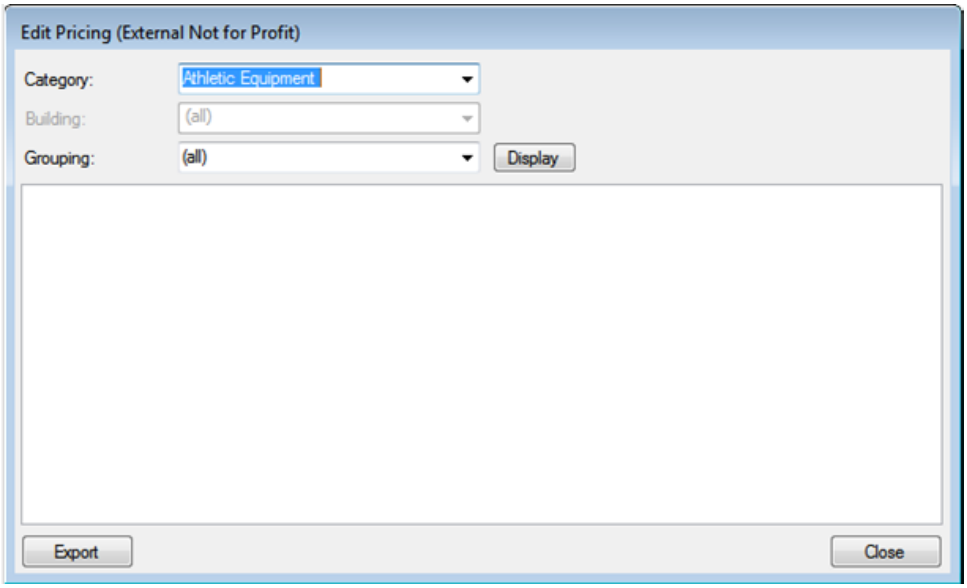
Rate Schedule Dialog Box

3. In the Rate Schedule field, enter a name or description for the new rate schedule (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.

Configure Pricing for Billable Items in a Rate Schedule

1. If you have not already done so, open the Rate Schedule window (click **Configuration** > **Billing** > **Rate Schedules**) and then select the rate schedule for which you are configuring the pricing for billable items.
2. Click **Pricing**. The Edit Pricing window opens.



Edit Pricing Window

3. Do one of the following:
   - To configure the pricing for a resource category, on the Category drop-down list, select the category, and then click **Display**. Optionally, on the Grouping drop-down list, select a resource grouping to filter the search results.
   - To configure the pricing for rooms, on the Category drop-down 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.
   - On the Building drop-down list, select a specific building, area, or view to filter the search results.
   - On the Grouping drop-down 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.
Half Day/Full Day (Service Time)	The total number of hours for the *service 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 service time 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 service time is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item. **Note:** This pricing method is only available for a resource with a service order.
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

Pricing Method	Description
	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. **Note:** This pricing method is only available for a resource with a service order.
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.
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

Field	Description
	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.

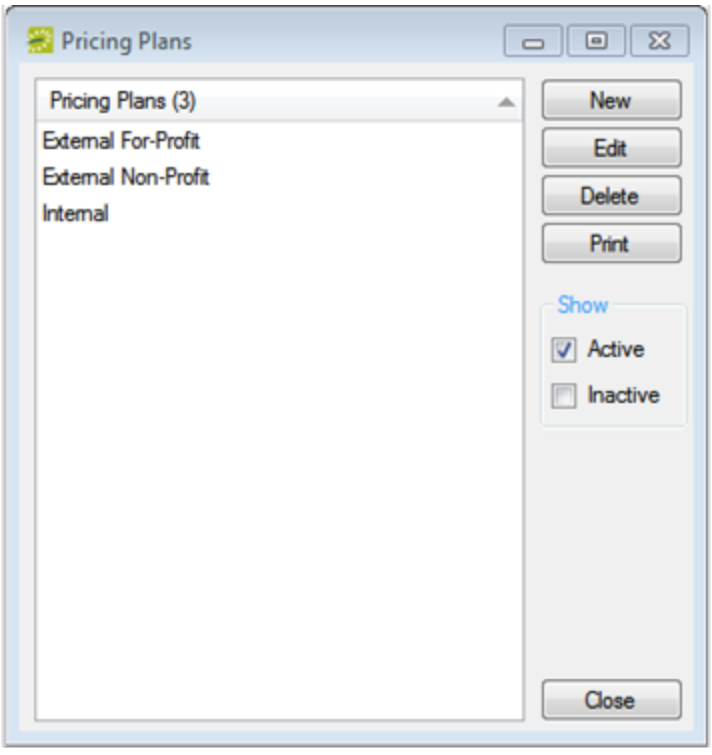
CHAPTER 47: Configure Pricing Plans

A *pricing plan* bundles different rate schedules. When you configure a pricing plan, you can specify different rate schedules for the billable items in the plan, and you can also 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.

Note:
To help you keep track of your pricing plans and how they are used (for instance, to keep track of all your discounts), export your pricing plans periodically.

To configure pricing plans through the Pricing Plans window, complete the following steps:

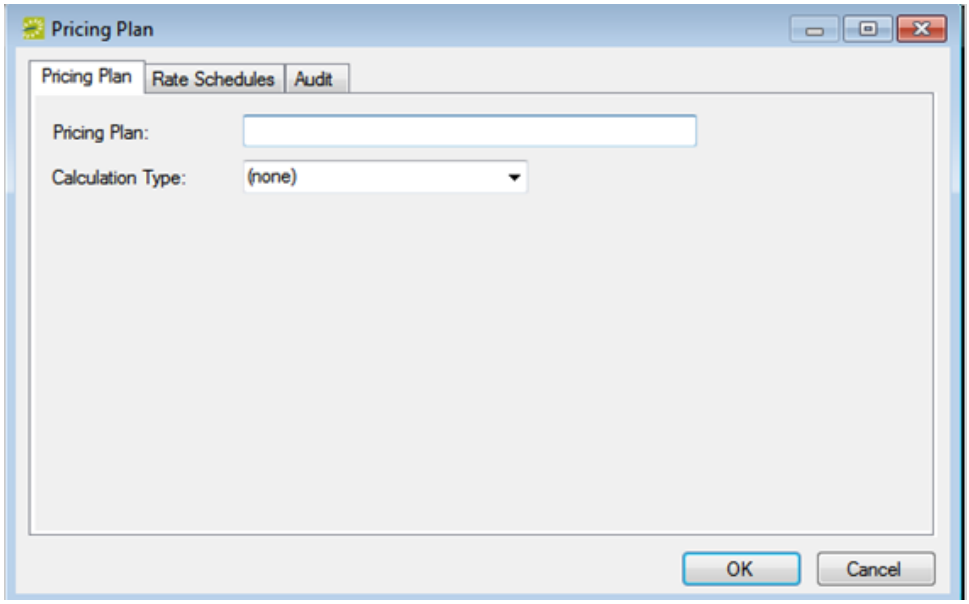
1. On the EMS menu bar, click **Configuration** > **Billing** > **Pricing Plans**. The Pricing Plans window opens. This window lists all the pricing plans that are currently configured in your EMS database and that have a status of **Active**.



Pricing Plans Window

> **Note:**
> 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.



Pricing Plan Dialog Box

3. In the Pricing Plan field, enter a name or description for the new plan (maximum of 30 characters, including spaces).
4. Optionally, select the type of calculation to apply to a resource as follows:
   a. From the Calculation Type drop-down list, select a calculation type:
      - **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 the group 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.

   b. 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.

> **Note:**
> If the appropriate calculation is not available, you can configure it. See Configure Calculations.

5. 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 drop-down list.

> **Note:**
> 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.

6. Click **OK**. The Pricing Plan dialog box closes. You return to the Pricing Plans window with the newly configured pricing plan automatically selected.

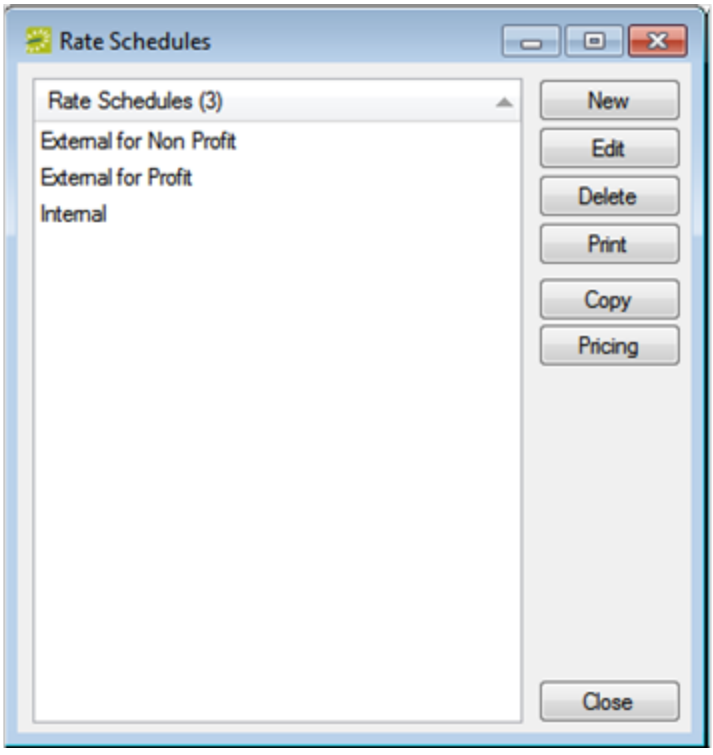
CHAPTER 48: Export Pricing Information for Billable Items (Rooms or Resources)

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.

Note:

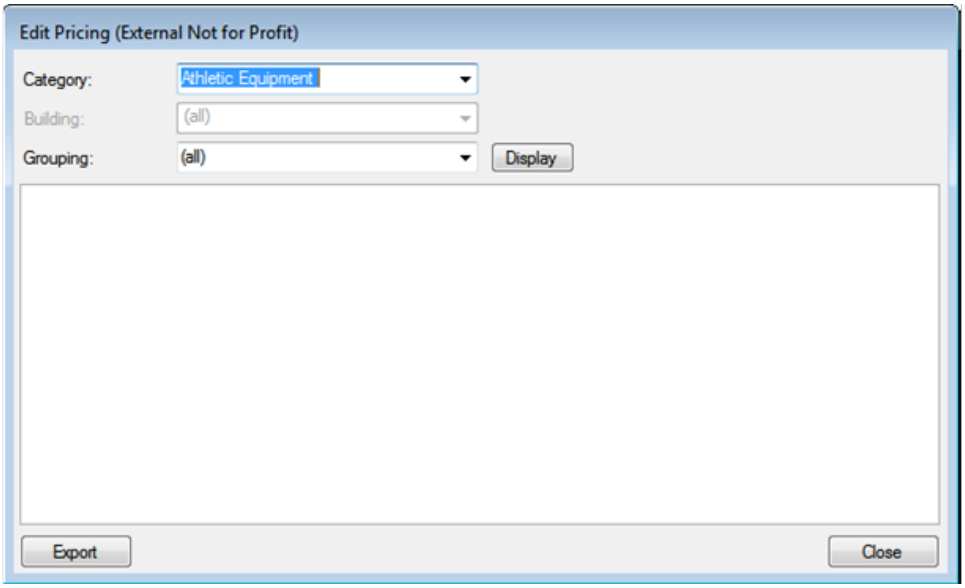
You do not need Microsoft Excel on your EMS client to export the information to the file; however, you must have Microsoft Excel on your EMS client to view the file. You can also export the pricing information for rooms and resources after you have configured the information for the room or resource. See Also: Export Pricing Information for a Room and Export Pricing Information for a Resource.

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.



Rate Schedules

2. Click **Pricing**. The Edit Pricing window opens.



Edit Pricing Window

3. To export the pricing information for a room or category, do one of the following:
   - **Room**—To export the pricing information for a room or rooms, on the Category drop-down 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 drop-down list, select a specific building, area, or view to filter the search results.
     - Optionally, on the Grouping drop-down list, select a room type to filter the search results.
   - **Category**—To export the pricing information for all the resources in a category, on the Category drop-down list, select the category, and then click **Display**.
     - Optionally, on the Grouping drop-down 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. You can also edit the name of the export file, and then save the file to a location of your choice.
5. When the Export Report message opens, 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.
6. Repeat Step 3 through Step 5 for each room or resource for which you are exporting the pricing information.
7. After you have exported all the necessary pricing information, click **Close**. The Edit Pricing window closes. The Rate Schedule dialog box remains open.

CHAPTER 49: Configure 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

Item	Calculated on	Calculation Result	Running Total
• 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	

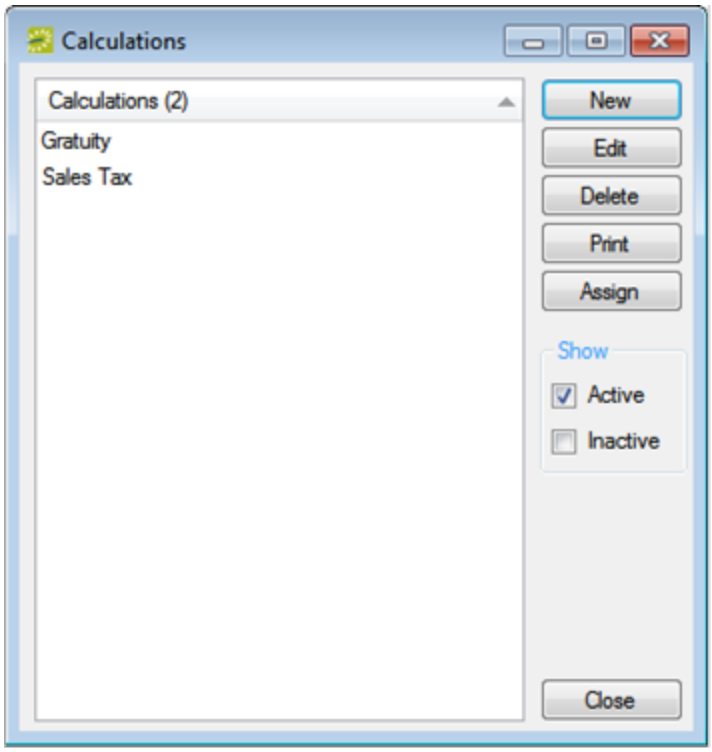
After you configure calculations, you can assign the calculations to a category, group, group type, resource, or room.

Configure Calculations

To configure calculations in the software, complete the following steps:

1. On the EMS menu bar, click **Configuration** > **Billing** > **Calculations**.

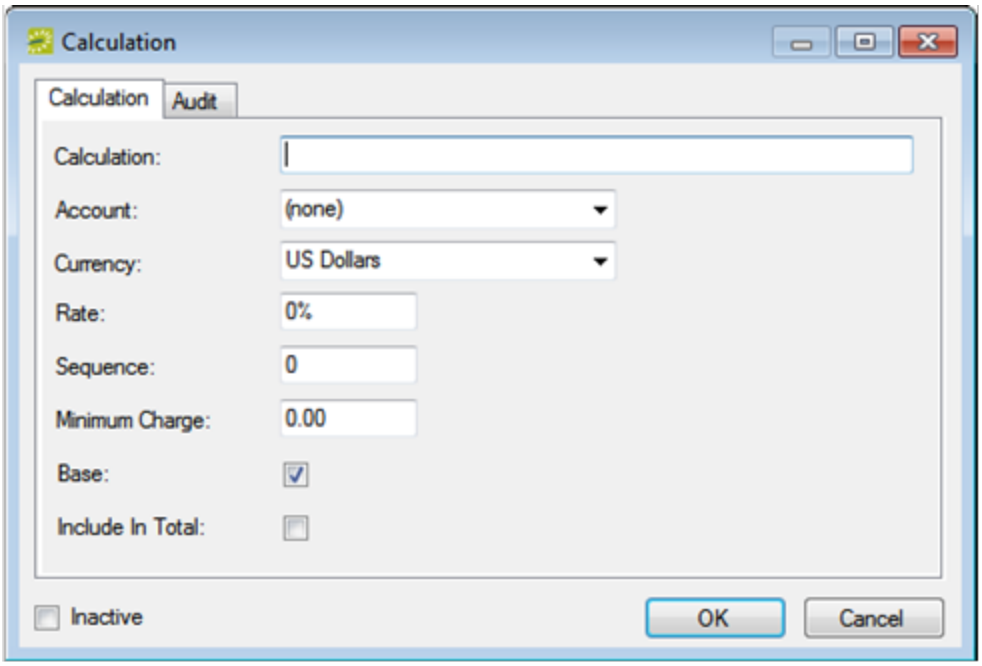
   The Calculations window opens. This window lists all the calculations that are currently configured in your EMS database and that have a status of **Active**.



Calculations Window

> **Note:**
> Optionally, to show all calculations, regardless of status, under Show, click Inactive.

2. Click **New**. The Calculation dialog box opens.



Calculation Dialog

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 Configure Accounts.
Currency	The currency symbol that is used to display the results of the calculation.

Field	Description
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.

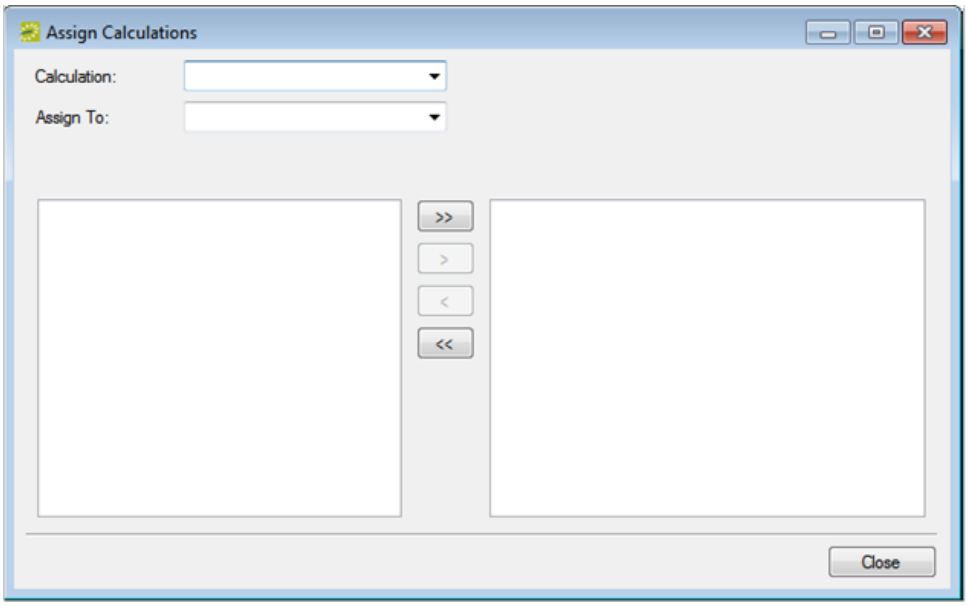
5. Optionally, continue to Assign Calculations below.

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.



Assign Calculations Dialog

3. On the **Calculation** drop-down list, select the calculation that you are assigning.
4. On the **Assign To** drop-down 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 drop-

Item Selected	Comments
	down list.
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 drop-down 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 drop-down 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.

CHAPTER 50: Configure 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.

Important!

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:

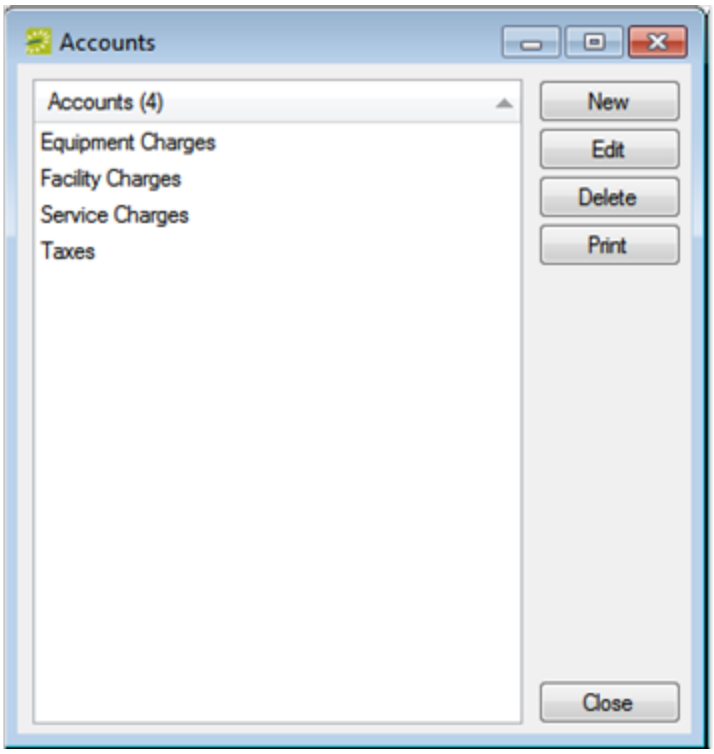
- Facilities Account
- Catering Fees Account
- Miscellaneous Charges Accounts

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.

Configure Accounts

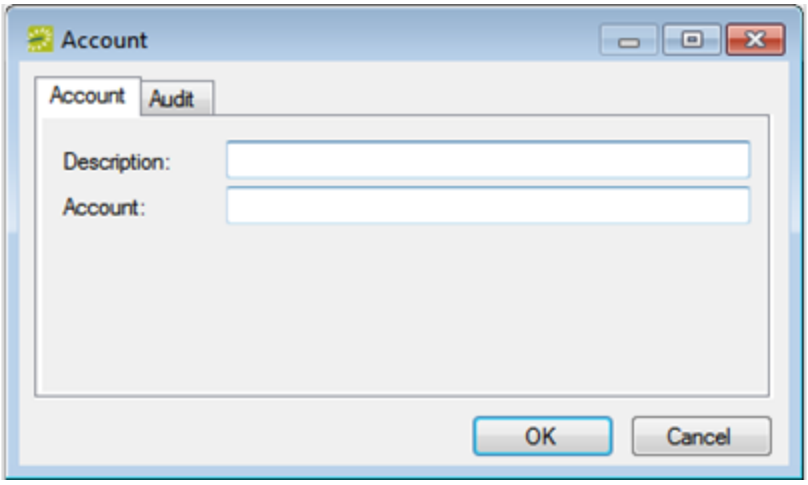
To configure accounts, complete the following steps:

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.



Accounts Window

2. Click **New**. The Account dialog box opens.



Account Dialog Box

3. Enter the information for the new account.

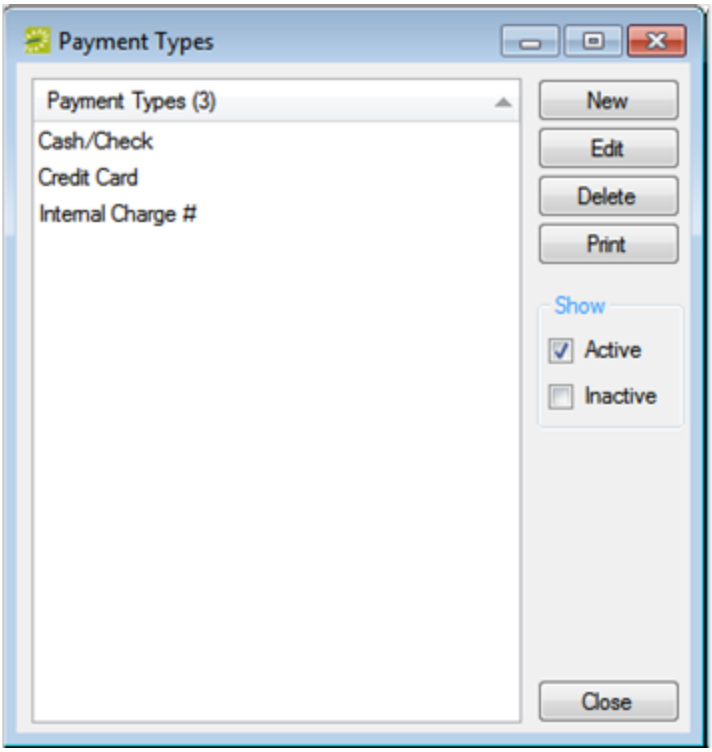
Field	Description
Description	The name or description for the account. **Note:** The description can be a maximum of 50 characters, including spaces.
Account	The code for the account. Typically, this is numerical, but it can be abbreviated text that conveys the account name or description. **Note:** 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.

CHAPTER 51: Configure 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.

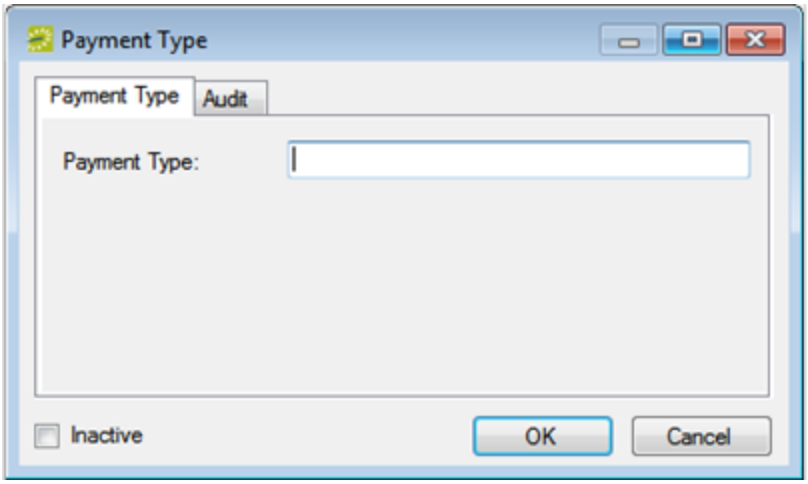
1. On the EMS menu bar, click **Configuration** > **Billing** > **Payment Types**. The Payment Types window opens. This window lists all the payment types that are currently configured in your EMS database and that have a status of **Active**.



Payment Types Window

> **Note:**
> Optionally, to show all payment types, regardless of status, under Show, click **Inactive**.

2. Click **New**. The Payment Type dialog box opens.



Payment Type Dialog Box

3. In the Payment Type field, enter a name or description for the new payment type.

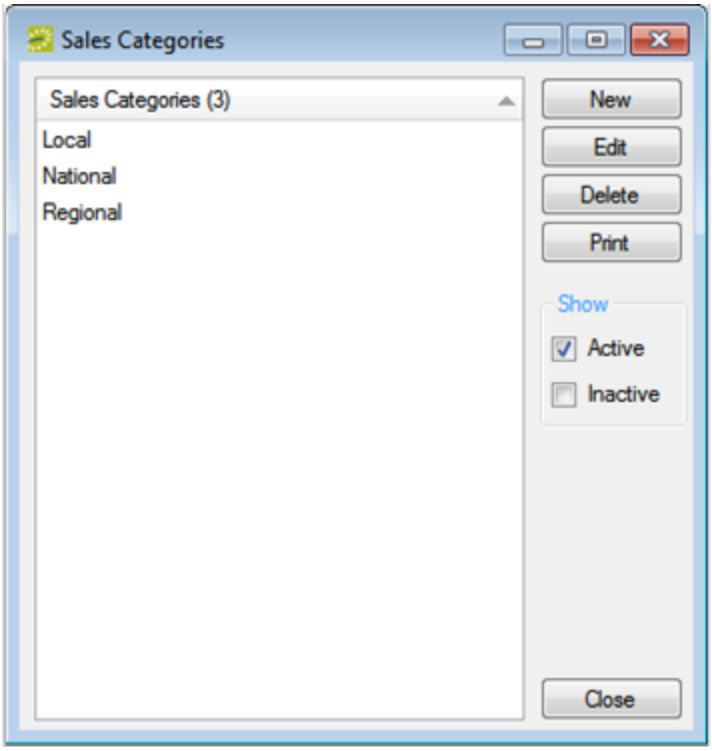
> **Note:**
> The payment type can be a maximum of 30 characters, including spaces.

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.

CHAPTER 52: Configure 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.

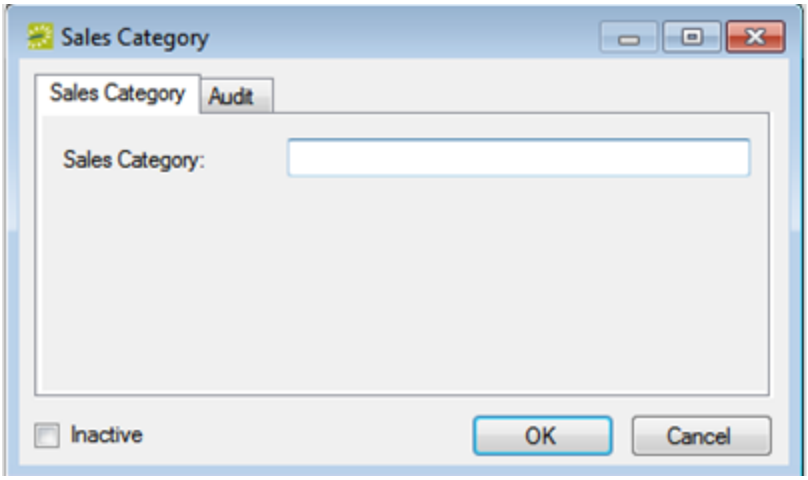
1. On the EMS menu bar, click **Configuration** > **Billing** > **Sales Categories**. The Sales Categories window opens. This window lists all the sales categories that are currently configured in your EMS database and that have a status of **Active**.



Sales Categories Window

> **Note:**
> Optionally, to show all sales categories regardless of status, under Show, click **Inactive**.

2. Click **New**. The Sales Category dialog box opens.



Sales Category Dialog Box

3. In the Sales Category field, enter a name or description for the new sales category.

> **Note:**
> 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.

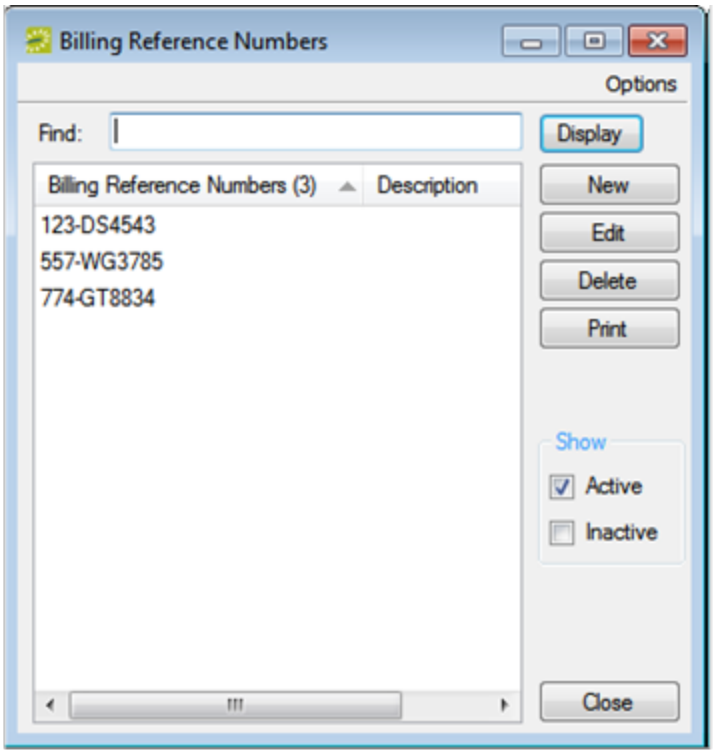
CHAPTER 53: Configure Billing Reference and PO Numbers

When you configure billing reference numbers and PO numbers, they are assigned to a "master list." When end-users are making a reservation or submitting a reservation request, 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.

Note:
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**.

Note:
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.

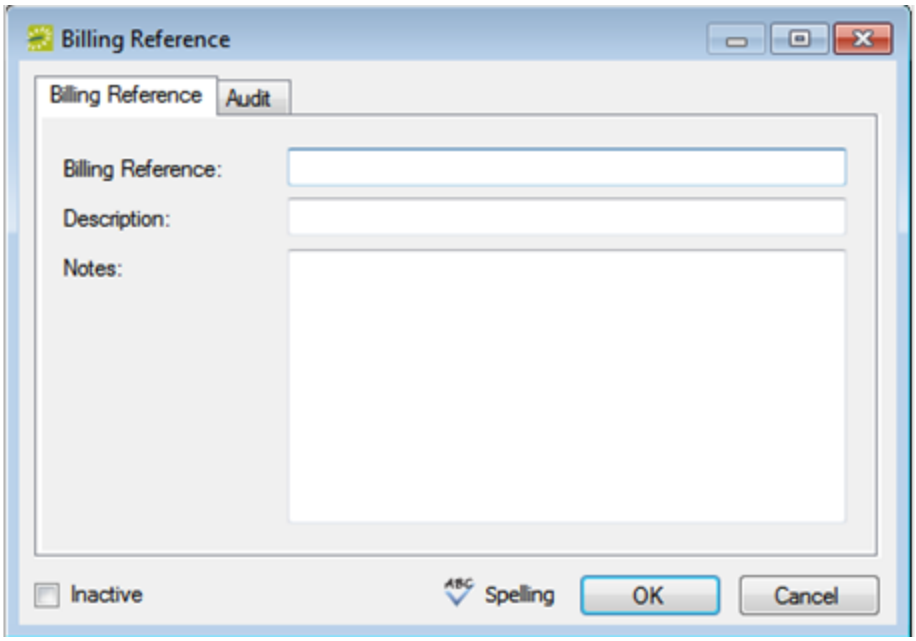


Billing Reference Numbers Window

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**.

> **Note:**
> 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 AlumniNE, 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.



Billing Reference 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.

Field	Description
	Note: This field is available for reporting in the Query Builder. See the EMS Desktop Client User Guide.

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.

Note:
The following Administration parameters control the name of the Billing Reference and PO fields: **Billing Reference Title Singular**, **Billing Reference Title Plural**, **PO Number Title Singular**, and **PO Number Title Plural**.

CHAPTER 54: Establish Billing Reference and PO Behavior

Billing Reference and PO numbers can be added to rooms and services. As an Admin, you can customize the behavior of these fields and when and where they appear and are required at many levels.

The lowest level where you set Billing Reference and PO field behavior (All Reservations, Booking Templates, Rooms, Services) overrides other settings.

For example, if you set behavior for a room, it will override settings from a booking template. This ensures that the room billing behavior is not changed by the booking template, so you can always charge for a special room.

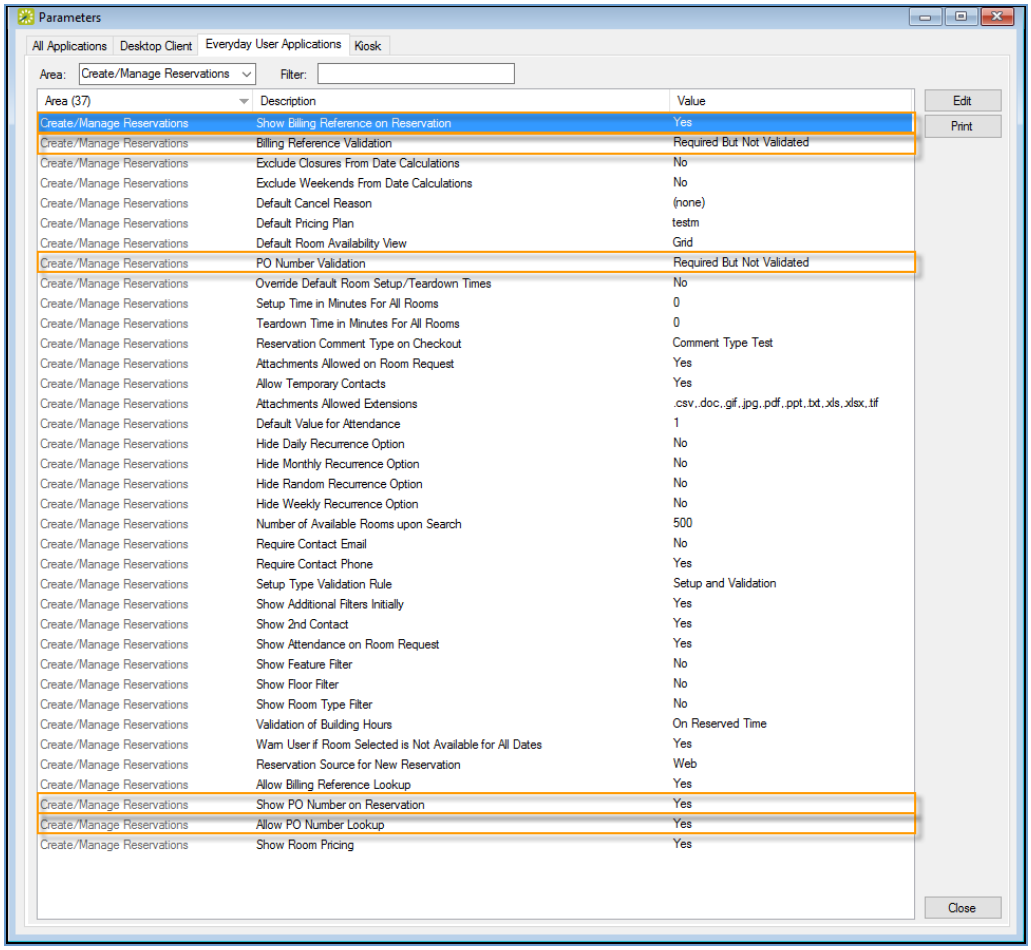
From EMS Desktop Client, you can set parameters for all reservations and for each booking template to control whether these fields are required, validated, and appear to users. You can also configure specific rooms and categories to prompt users to enter values in these fields. For example, you could globally set the Billing Reference field to appear for all reservations in your system, but then you could also set one booking template, a room and a few service categories to also prompt the user for PO numbers. Your settings for the booking template would override the global settings, and the prompts for the room and service categories would override both the global setting and the booking template setting.

This topic will include information on the following:

- Globally Set Behavior for All Reservations
- Set Behavior for a Booking Template
- Set Behavior for a Category
- Set Behavior for a Service
- Set Behavior for a Room to Prompt Users for a Billing Reference

Globally Set Behavior for All Reservations

You can set global parameters for Billing Reference and PO Number field behavior as shown below in the EMS Desktop Client (**System Administration** > **Settings** > **Parameters** > **Everyday User Applications** tab):



Everyday User Applications Tab of the Parameters Dialog Box

Note:

These settings default to **No**.

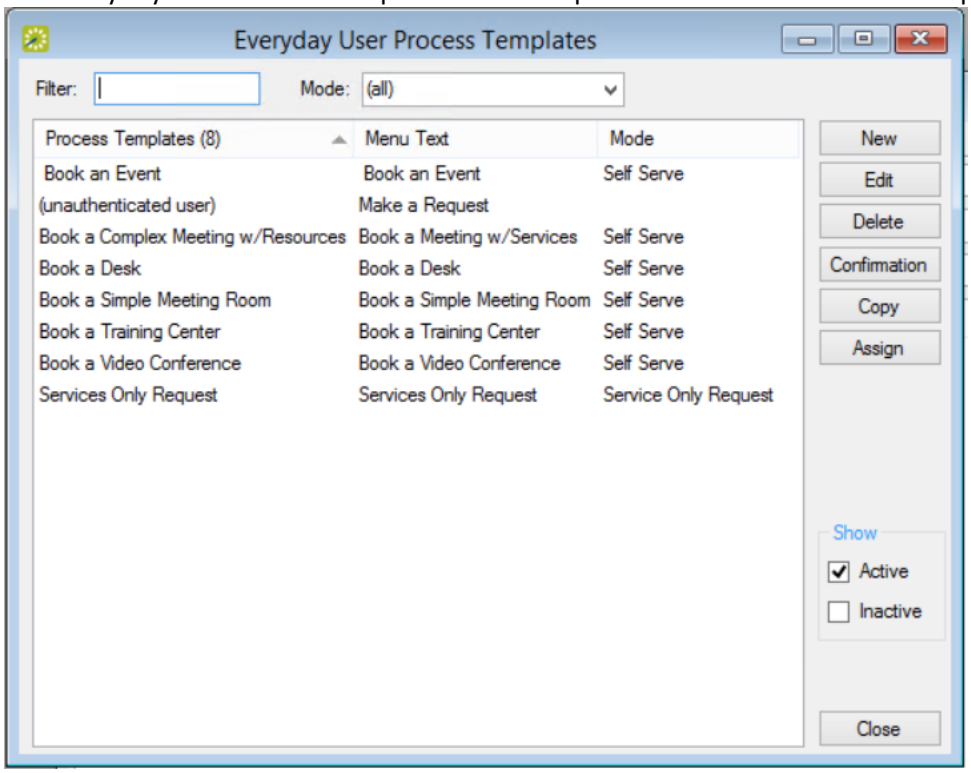
See Also: Complete Instructions on Configuring Categories.

Set Behavior for a Booking Template

You can set behavior for Billing Reference and PO Number fields for a specific template when you configure the template, which will override settings at the Global level. These settings default to **No**.

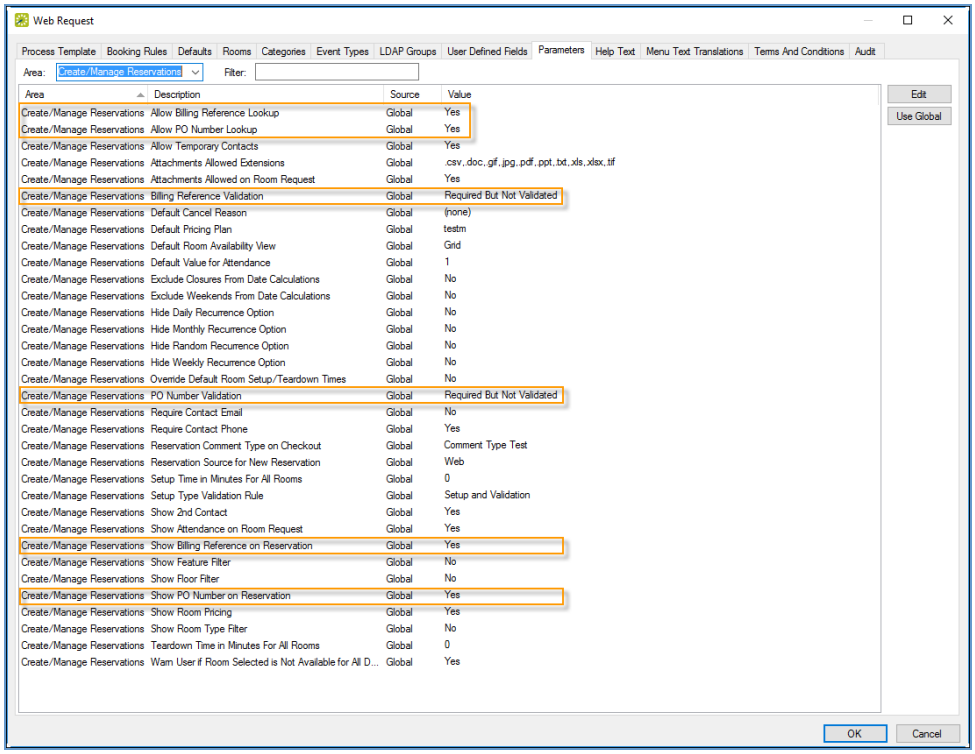
1. On the EMS menu bar, click **Configuration** > **Everyday Applications** > **Everyday User Process Templates**.

2. The Everyday User Process Templates window opens. Select **New** or select a template and click **Edit**.



Everyday User Process Templates Window

3. When the Everyday User Process Template dialog box opens, click the **Parameters** tab and configure the parameters highlighted in the following image to control field behavior.



Parameters Tab of the Everyday User Process Template Dialog Box

See Also: Complete Instructions on Configuring Categories.

Set Behavior for a Category

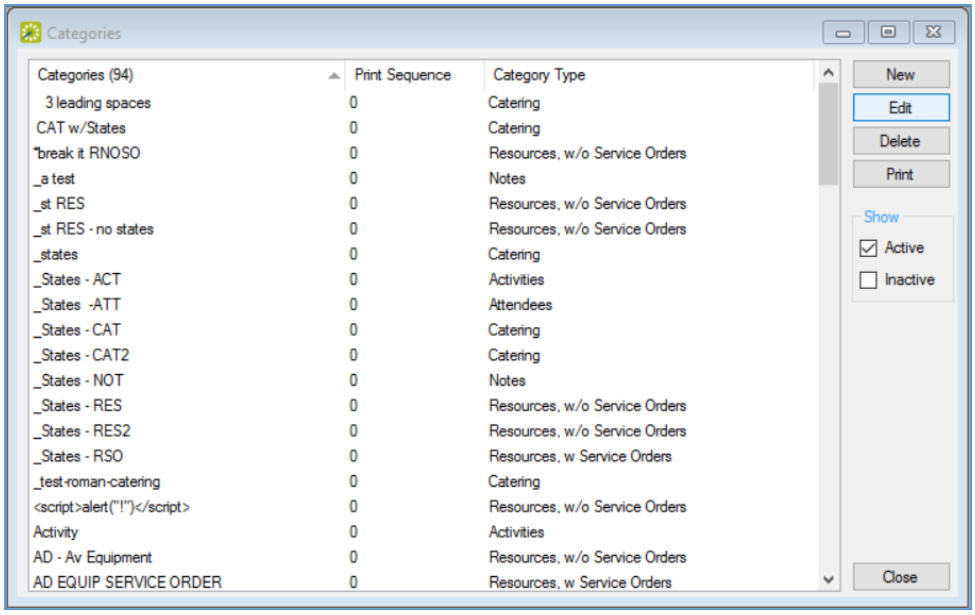
Use this procedure if you only want specific service categories to use Billing Reference and/or PO numbers. Setting behavior for Billing Reference and PO number fields at the category level will apply to any bookings made using that Category (and override settings at the Global or Template level if those are set to **No**).

Important!

Before proceeding, make sure that the global and template settings for these fields are set to **No**.

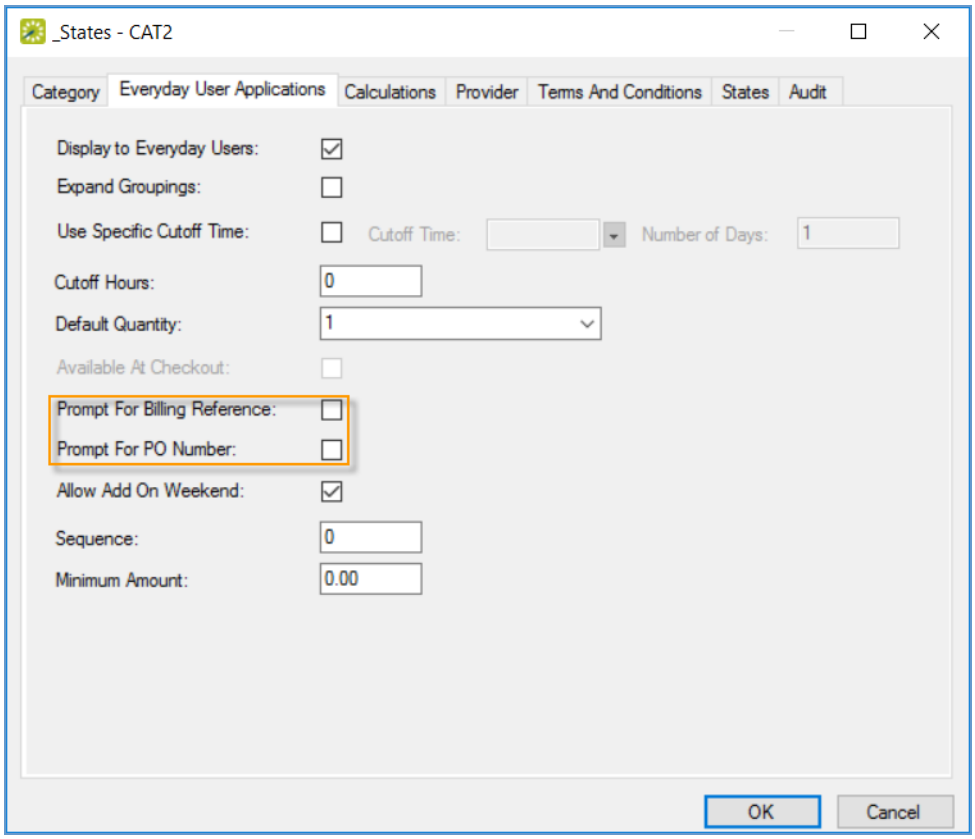
1. On the EMS menu bar, click **Configuration** > **Administration** > **Categories**. The Categories window opens.

2. Click **New** or select a Category and click **Edit**.



Categories Window

3. On the screen that appears, select the **Everyday User Applications** tab, and use the fields highlighted below to set bookings with this template to prompt the user for Billing Reference and/or PO information.

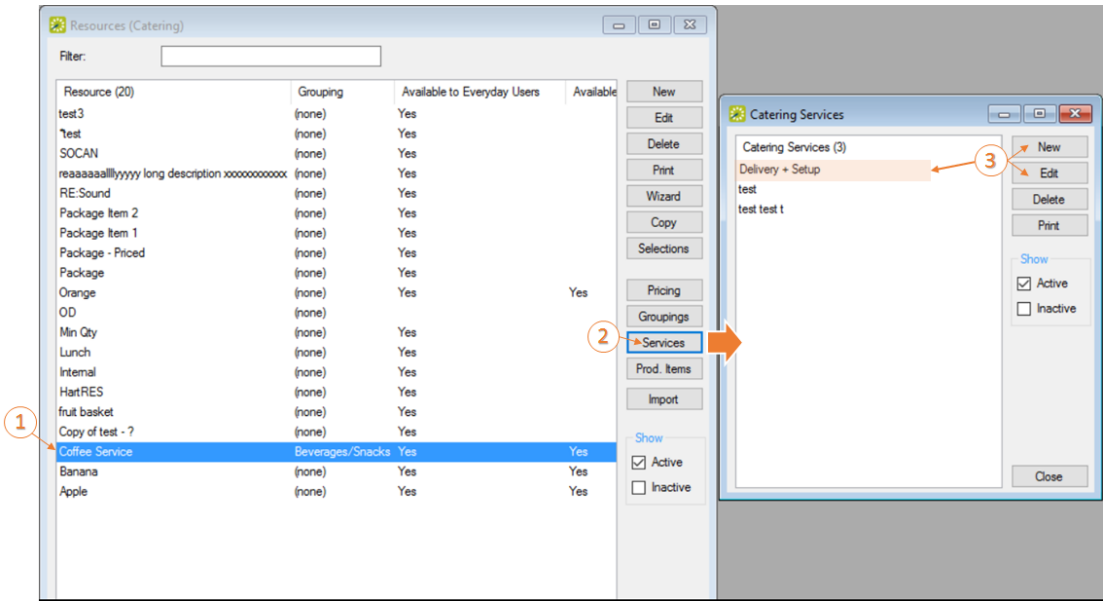


Everyday User Applications Tab of the Categories Dialog Box

See Also: Complete Instructions on Configuring Categories.

Set Behavior for a Service

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 resource for the service category you want to set Billing Reference and/or PO number field behavior.
3. From the Resources screen that appears, select the category for the service you want to edit, and click **Services**. Then create a New service or select and Edit an existing one.

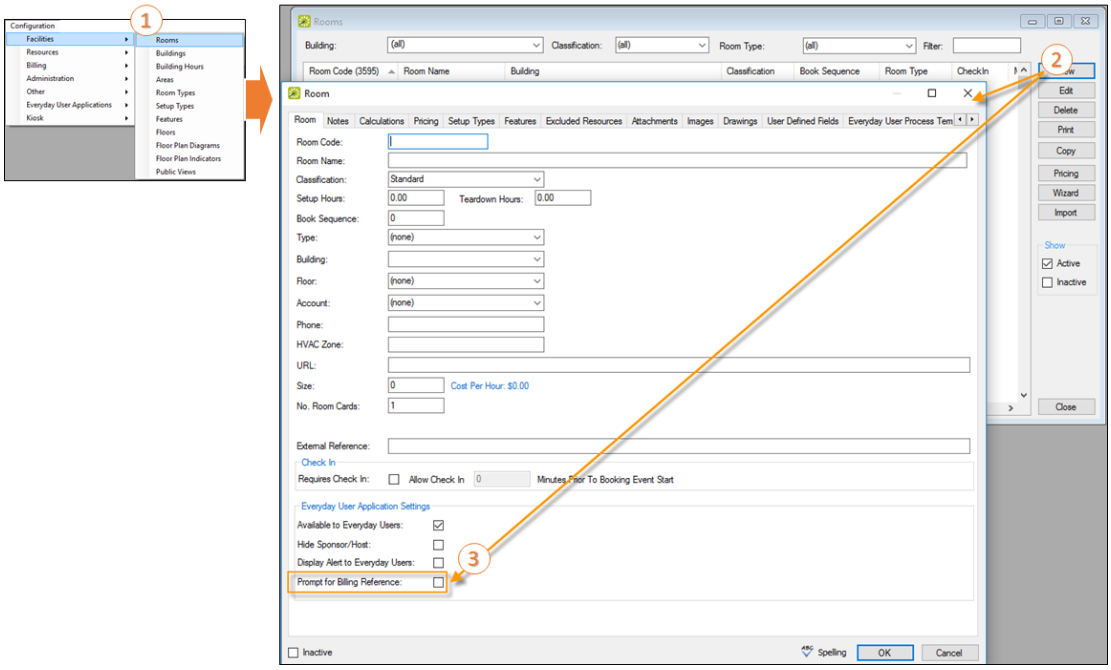


Steps to Set Behavior for a Service

See Also: Complete Instructions on Configuring Categories.

Set Behavior for a Room to Prompt Users for a Billing Reference

Follow the steps below from the Configuration menu to require users to enter a Billing Reference when choosing this room. These settings will override settings at the Global, Template, and Category levels.



Steps for Configuring a Room to Require Users to Enter Billing Reference

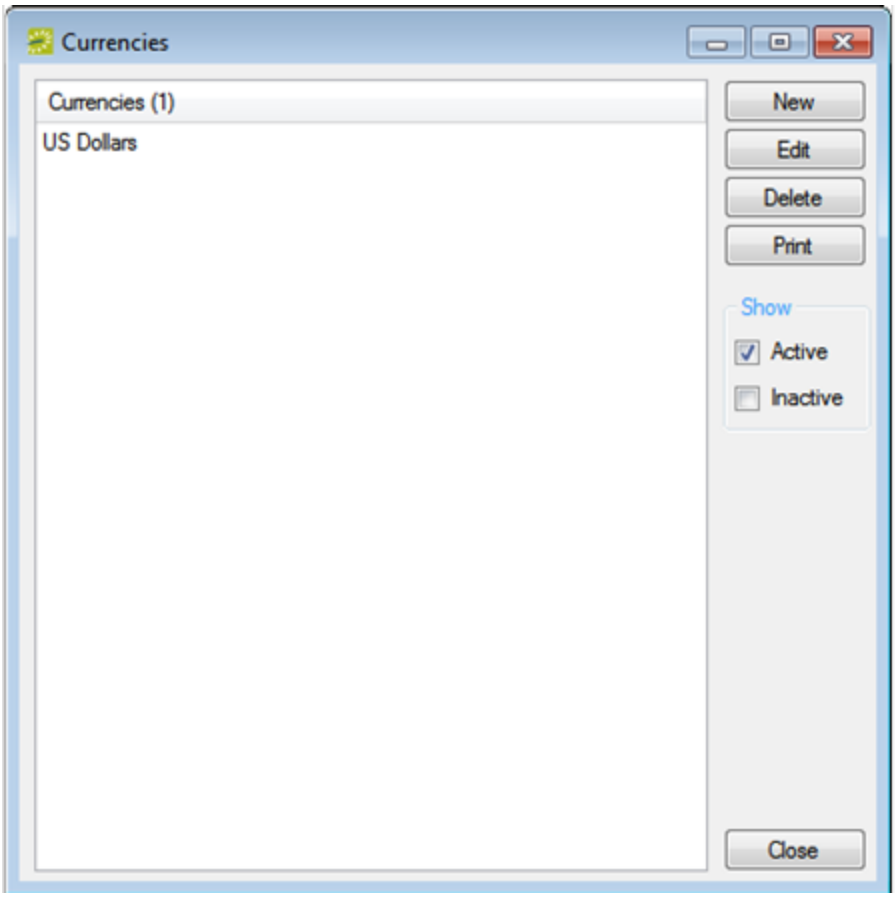
CHAPTER 55: Configure Currencies

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 EMS Web App, and so on.

Note:

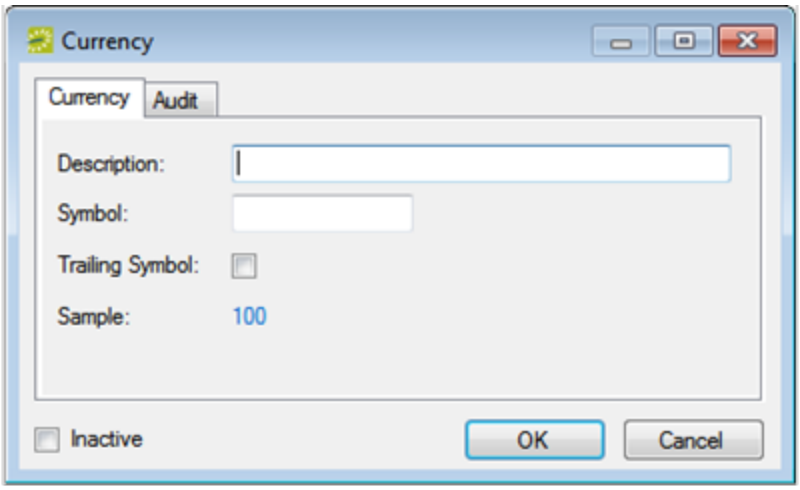
You can also configure multiple currencies in a single step. See Currency Configuration Wizard.

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**. To show all currencies, regardless of status, under Show, click **Inactive**.



Currencies Window

2. Click **New**. The Currency dialog box opens.



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. **Note:** To add special characters, copy and paste from a text file.
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.

CHAPTER 56: 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.

The following topics are covered in this section:

- Configure Categories
  - Enable Visitor Management
- Configure Departments
- Configure Statuses
- Configure Notification Rules
  - Types of Notification Rules
- Configure Group Notification Rules
- Configure Check-in Notification Rules
- Configure Room Card Formats
- Configure Calendar Formats
- Configure Reservation Wizard Templates

CHAPTER 57: Configure Categories

In EMS Desktop Client, you might think the terms category, resource, and service can be used interchangeably; however, these terms are different concepts.

A *category* in EMS is anything you might add to a booking, such as catering, audio visual, furniture, security, notes, attendee names, or agendas. When you configure a category, however, you must select one of the following six category types:

- Activities
- Attendees
- Catering
- Notes
- Resources with Service Orders
- Resources without Service Orders

These category types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it, and there is nothing for a user to "select" from these types of services.

By contrast, a *service category* that has a type of catering, resource with service order, or a resource without a service order category, will require the EMS Administrator to create items under it. For example, an AV Equipment service category (configured as a *Resource without a Service Order Category* type) might have items under it, such as a flip chart or whiteboard. The user requesting the service for this meeting would select AV Equipment, and then the user might select options, such as flip chart and whiteboard, to add to the event.

Note:

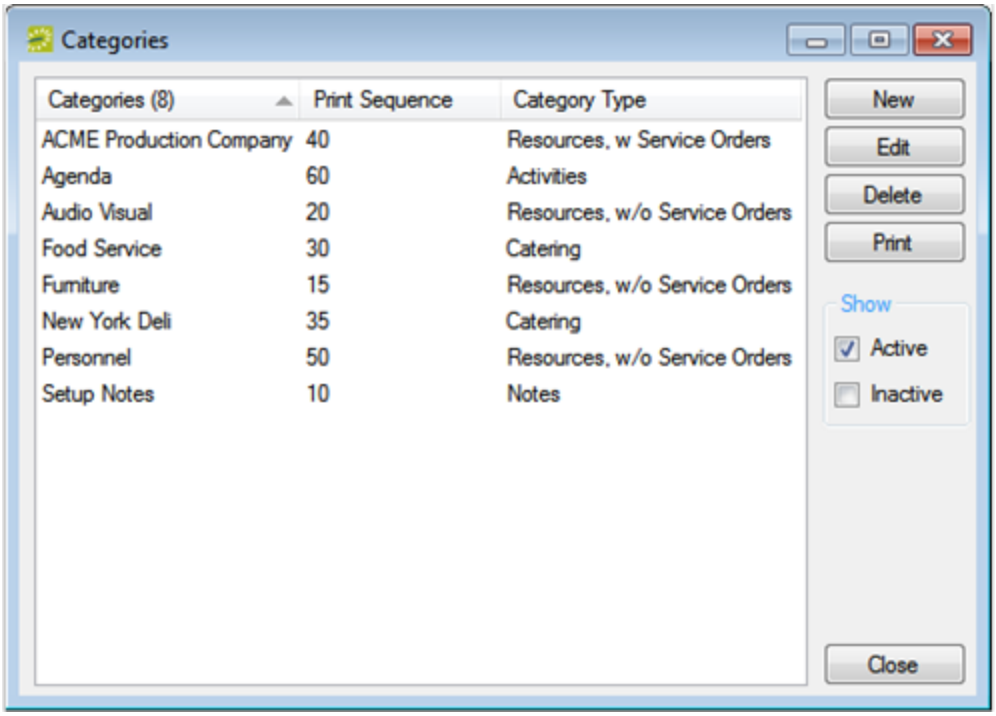
The following category types allow Production Items: Catering, Resources with Service Orders, and Resources Without Service Orders.

Note:

A Category can be configured to Use States so that when a service is requested with a meeting, the service can be managed through a review and approval process in the Manage Services toolbar option in EMS Desktop Client.

To configure categories in EMS Desktop Client, complete the following steps:

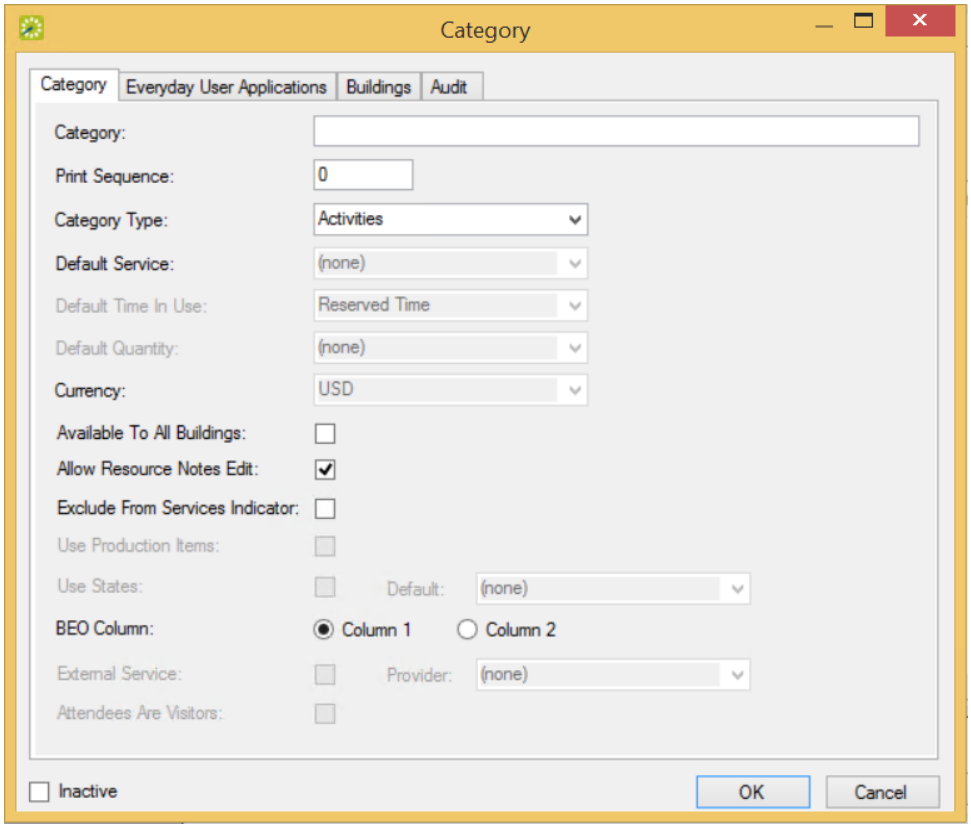
1. On the EMS menu bar, click **Configuration** > **Administration** > **Categories**. The Categories window opens, where you can define categories of services you can add to booking templates. This window lists all the categories and their types that are currently configured in your EMS database and that have a status of **Active**. To filter all Categories regardless of status, under Show, click **Inactive**.



Categories Window

> **Note:**
> You can define a category here with the **Category Type** of **Attendees** to enable users to add attendees to a booking on the EMS Web App Services page. If you define this Category and then add it to a booking template for Everyday Users, then they can control attendees as part of editing Services.

2. Click **New**. The Category dialog box opens on the **Category** tab.



Category Dialog Box

3. Enter the information for the new Category.

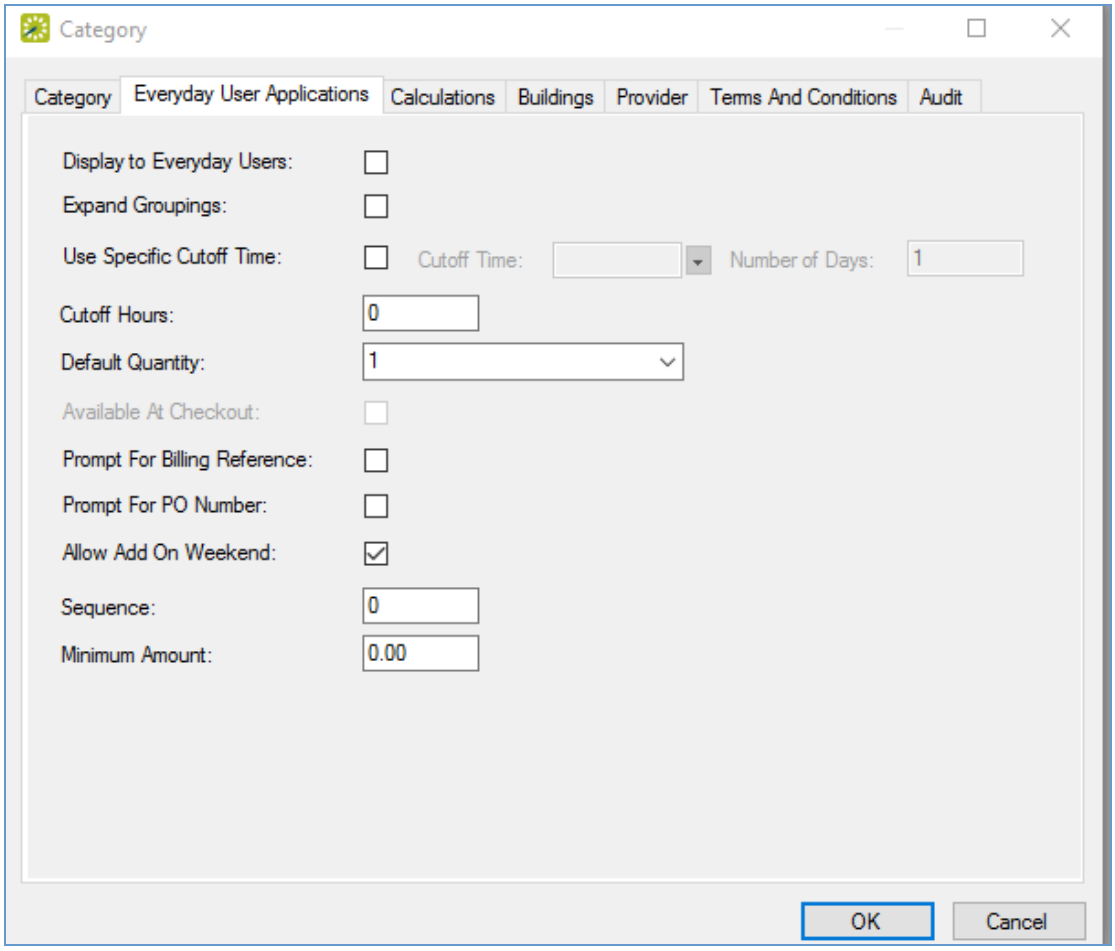
Field	Description
Category	The name or description for the category, for example, A/V Equipment or Furniture (maximum of 30 characters, including spaces).
Print Sequence	If items from multiple categories have been reserved for an event, then the print sequence determines the order in which this information is printed on the confirmation and other reports. 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	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. **Note:** The **Attendee** category type does not typically relate to attendees invited to a meeting using the optional EMS for Outlook add-in or using Integration to Microsoft Exchange module for EMS Web App or EMS Mobile App. • **Notes** — A free-form block of text that is used to enter clarifying or miscellaneous information about the event. For example, your users can 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 this Category Type are assigned for the entire event time. Typically, this Category Type is 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 assigned to a booking are needed. The end result is one or multiple service orders with specific services times before, during or after the event. Typically, this Category Type is used manage staffing for an event. • **Catering** — Used to manage categories specific to food & beverage service. 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. **Note:** If you select **Resources w/o Service Orders**, **Resources w/ Service Orders**, or **Catering**, then the Use Production Items option becomes available.
Default	Services are defined at the resource level. (See Also: Configure Resources for a Category.)

Field	Description
Service	After you define your resources and services, then you can edit the 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 on the category that was selected, one or more of the following options are available: • Setup Count • Estimated Count
Currency	Select the currency to be used for pricing all the resources in the category. **Note:** If the appropriate currency is not available, you can configure it. See Configure Currencies.
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.
Allow Resources Notes Edit	If selected, EMS Desktop Client users can edit the Notes field for the resource.
Exclude from Services Indicator	In various EMS locations, such as the Reservation Book, the Navigator, and the Edit Booking form, EMS provides an indication that services exist for a booking. Select the **Exclude from Services Indicator** 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. Production Items are typically used for Catering category types where EMS software will be used by a production kitchen.

Field	Description
	Note: Production items are defined at the resource level. See also: Configure Resources for a Category and Define Production Areas and Production Items for a Catering Resource.
Use States	Select this option if you want to define process phases, or states, for the category, such as "Assigned," "Out for Delivery," and "Delivered." If you select the **Use States** check box, a **States** tab appears. On this tab, define the different states that you want to configure in support of your category's workflow. **Note:** After you define your states, 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 (BEO) 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.
External Service	Select the **External Service** option if the provider of the resources for this category is external to your organization, and then select the provider on the Provider drop-down list. **Note:** The **External Service** check box is only available for the **Notes** category type and if the EMS system parameter **Show External Service Orders on Categories** is set to **Yes**. See EMS Desktop Client Parameters for more information. **Note:** If the appropriate service provider is not available, contact EMS Support for assistance in configuring the provider.
Attendees are Visitors	Select the **Attendees are Visitors** 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 **Everyday Applications** tab and enter the appropriate information.



Everyday Applications Tab of the Category Dialog Box

Important!

Settings on the **Everyday Applications** tab control behavior for Everyday User Applications: EMS Web App. EMS for Outlook, and EMS Mobile App.

Field	Description
Display to Everyday Users	If selected, EMS Web App and EMS for Outlook 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 EMS Web App or EMS for Outlook user makes a reservation. If cleared, only the grouping is

Field	Description
	displayed and a user must expand the grouping to view the resource items. Typically, this option is selected if an option has a small list of resources within the category.
Use Specific Cutoff Time	Indicates how far in advance of a booking a EMS Web App or EMS for Outlook 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 EMS Web App or EMS for Outlook users cannot assign, edit, or cancel categories or resources after 11:00 a.m. on the day before the event.
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	From the Default Quantity drop-down field, you can select **1**, **Attendance**, or **Blank**. The default quantity that you select is automatically filled in by the system when an EMS Web App user or EMS for Outlook user selects an item.
Available at Checkout	Select **Available at Checkout** if this category is to be displayed as part of the initial Room Request process in EMS Web App. If **Available at Checkout** not selected, EMS Web App users must first complete the Room Request process before they can request the category. **Note:** For example, if an Attendee-type category is associated with a booking template and the **Available at Checkout** option is selected, then users will be able to add or remove attendees *during* the booking. If **Available at Checkout** is not selected, users will only be able to manage attendees on the **Reservation Details** > **Services** page once the reservation is created and they are in edit mode.
Prompt for Billing Reference Prompt for PO Number	Select this option if EMS Web App users are to be prompted to enter a billing reference and/or PO number when they select a resource from the category. **Note:** Selecting the **Prompt for Billing Reference** or **Prompt for PO Number** option does not *require* the user to enter the billing reference or purchase order values. Instead, selecting these options only has the system prompt users to enter the values.

Field	Description
	The behavior of these fields (required, validated, or displayed) is controlled in the *Billing Reference Validation* and *PO Number Validation* Everyday User Applications system parameters in EMS Desktop Client. Users will see the Billing Reference field during the booking process when the parameter is set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, and category-level. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the Admin decides whether to display the field, user entries will be validated based on the value in the *Billing Reference Validation* parameter set on the template. Billing Reference field options: • Show (Prompt) • Require • Validate (Show and Require) • Don't Show Additionally, the *Billing Reference Validation* parameter will always determine whether it is optional, required, or required and validated. **See Also:** Establish Billing Reference and PO Number Field Behavior.
Allow Add On Weekend	Select this option to allow a EMS Web App user to add a service order to a Saturday or Sunday booking.
Sequence	Determines the order in which the category is displayed in a list of categories in EMS Web App or EMS for Outlook. 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 EMS Web App or EMS for Outlook for this category.
Inactive	To add the category as an active category, do NOT select the **Inactive** check box. To inactivate the category, select the **Inactive** check box.

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 (CTRL-click to select multiple calculations) you always want to apply to this category, and then Move (>) the them 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 Configure Calculations. You can also define calculations at the resource item level. See Configure Resources for a Category.
   - 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 Desktop Client.
   - Open the **Terms and Conditions** tab and format a Terms and Conditions message that must be acknowledged by EMS Web App or EMS for Outlook users when they select 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**, continue to the next step; 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 (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.
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 Configure Resources for a Category.

CHAPTER 58: Enable Visitor Management

Visitors—or guest attendees who are not part of your organization—can be added to your meetings if you enable this feature. Depending on your licensing, you can contact your Professional Services representative to add this feature.

To enable visitor management, you will:

- Configure a Category for Visitors, which can be associated with booking templates
- Set Everyday User Booking or Process Templates to allow the Visitor category
- Add your newly created Visitor category to your Everyday User Process Templates
- Authorize users to manage visitors

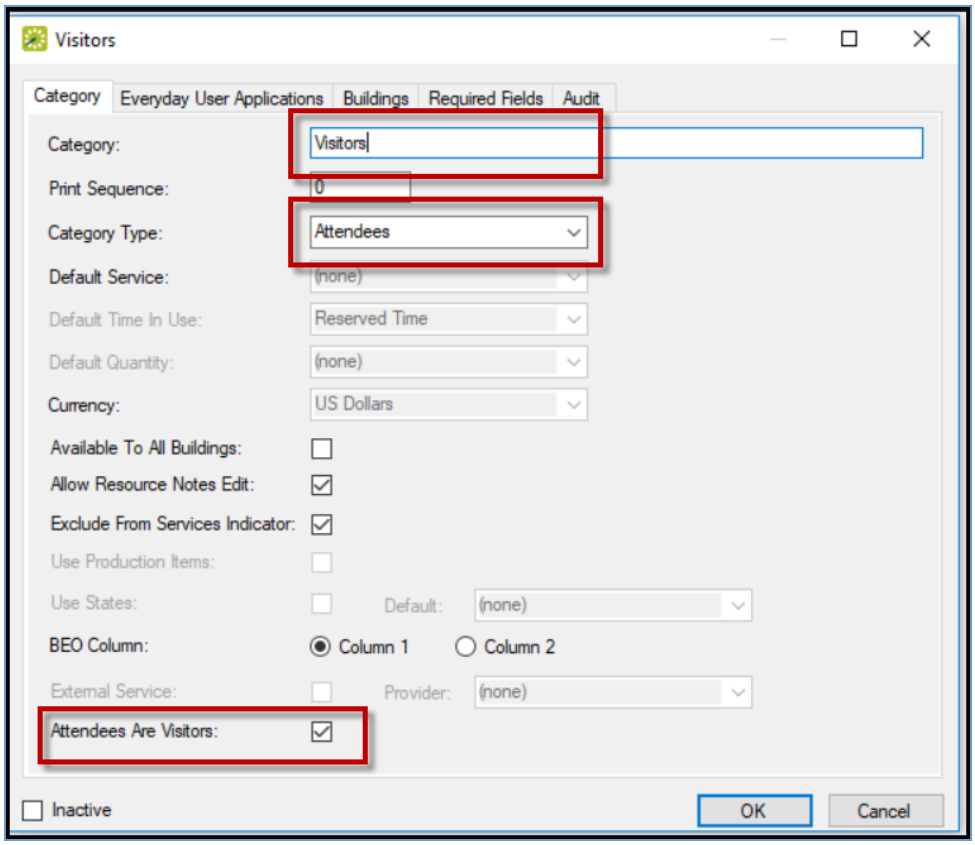
Configure a Category for Visitors



Note:

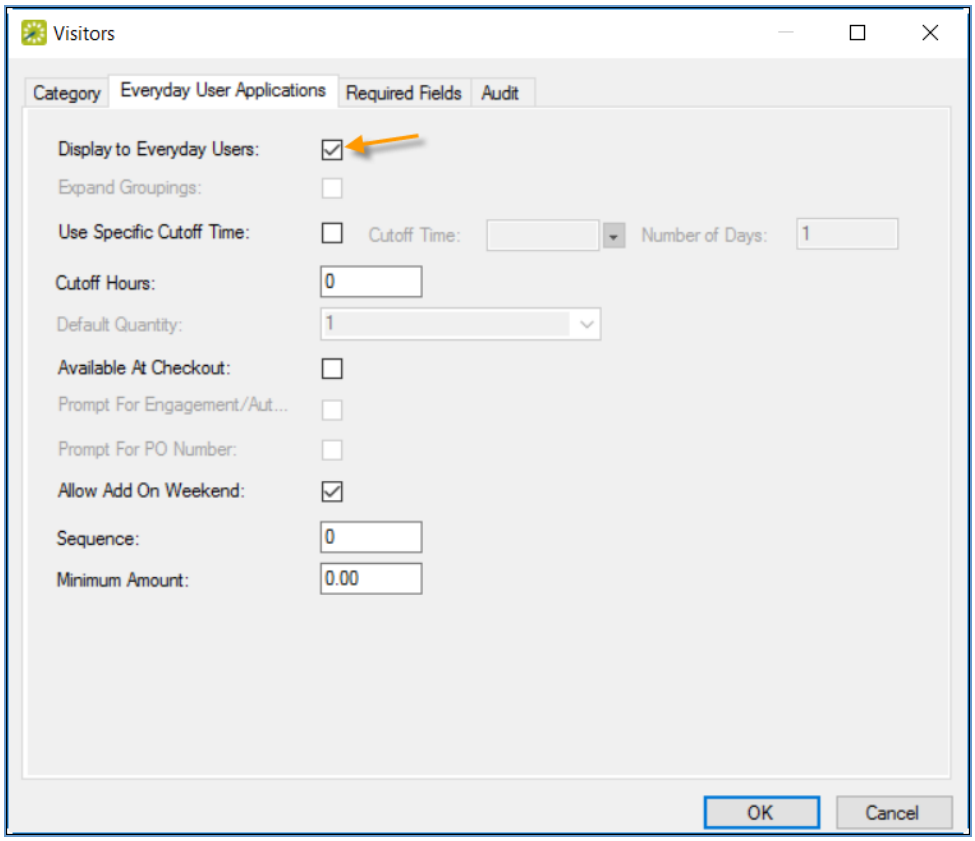
The Visitor Management tab is displayed only if your organization has purchased and installed the optional Visitor Management module, which enables front-desk users such as reception to check in visitors, print badges, access lists of visitors, and run reports. The values that you specify on this tab are used when a new visitor checks into your building. See Also: Specify Unregistered Attendee/Visitor Behavior.

1. In the EMS Desktop Client, navigate to **Configuration** > **Administration** > **Categories**.
2. When the Categories window opens, click **New** to create a new category for visitors in the Category dialog box.
3. Click the **Category** tab and do the following:
   a. Enter a category name in the **Category** field.
   b. Ensure the **Category Type** field is set to **Attendees**.
   c. Select the **Attendees Are Visitors** box at the bottom of the tab to enable the **Visitor** check box as a default on your Everyday User Template.



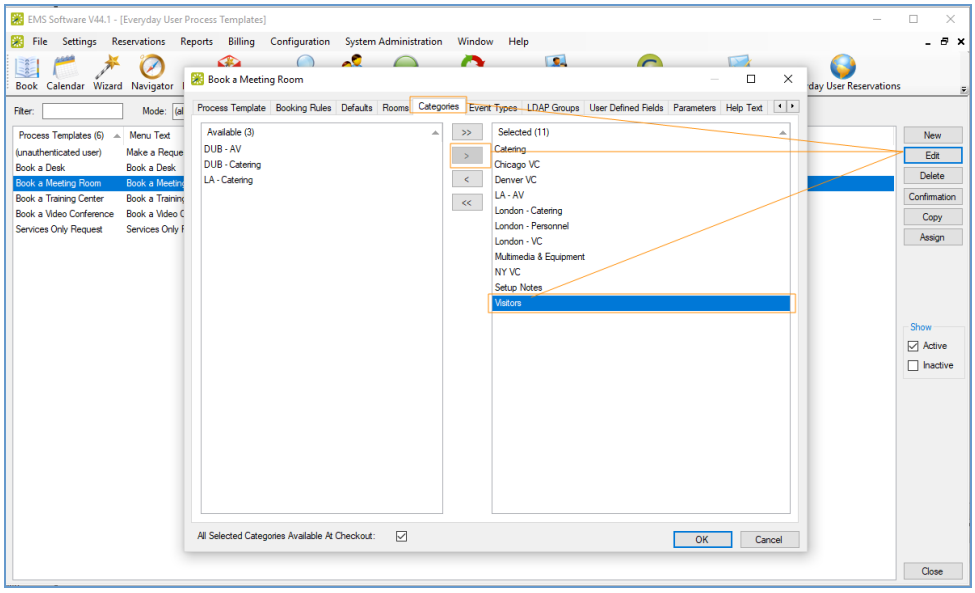
Create a Visitors Category in the Category Dialog Box

4. From the **Everyday User Applications** tab, select the **Display to Everyday Users** option so that the category is available for those booking templates.



Everyday User Applications Tab of the Category Dialog Box

5. Open the Everyday User Process Templates window (**Configuration** > **Everyday User Applications** > **Everyday User Process Templates**) and do the following to add the newly created **Visitors** category to a template:
   a. Select the process template that you want to add the **Visitors** category to and click **Edit**.
   b. From the **Categories** tab, use the arrow to move the **Visitors** category from the Available column to the Selected column.
   c. Click **OK** to save your changes.

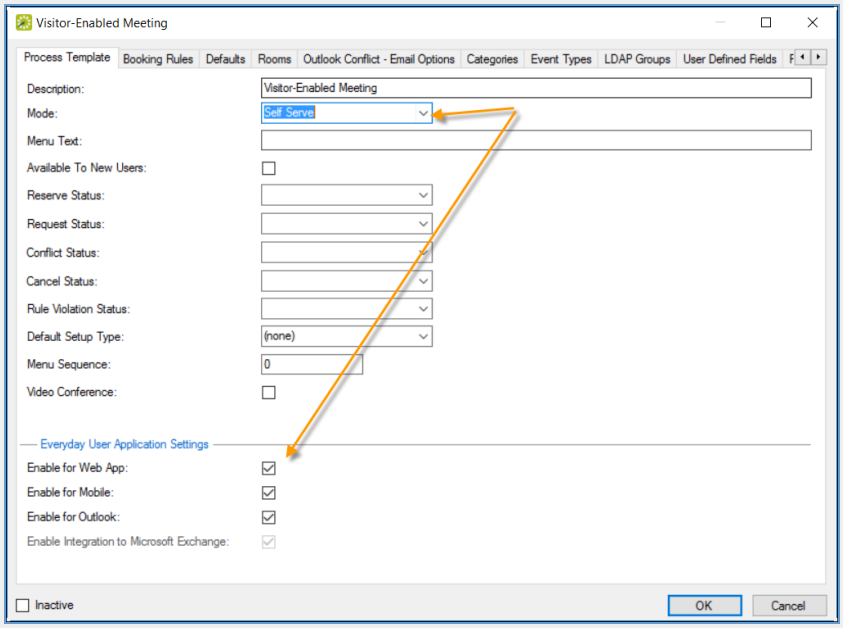


Adding the Visitors Category to an Everyday User Process Template

6. Authorize users to manage visitors.

Note:

If you only allow certain types of users to handle visitors, be sure to assign them to the template you configured above using the **Assign** button. If you want to allow visitors to check themselves in (for example, using EMS Mobile App, choose the **Self Serve Mode** on the **Process Template** tab when configuring the template, and be sure to enable it for Everyday User Applications as needed.



Self Serve Mode

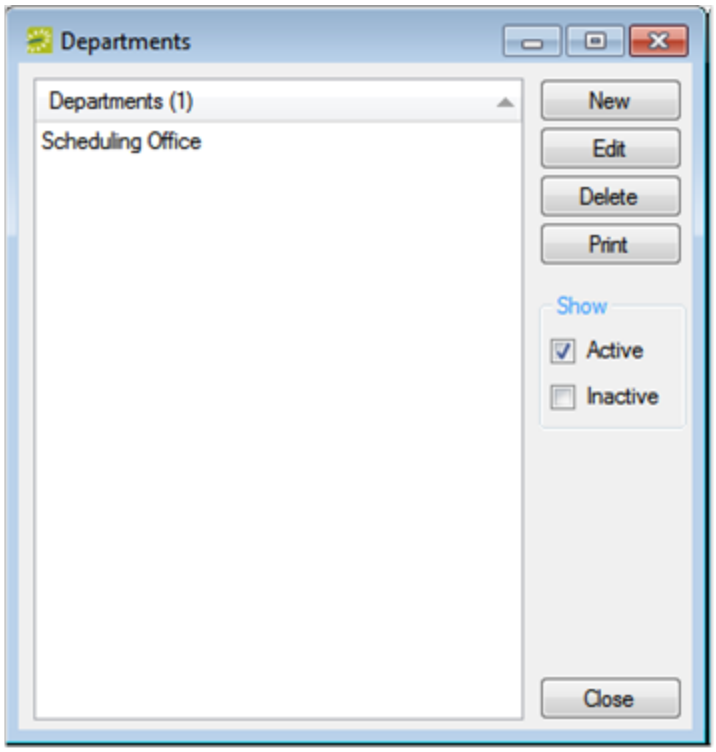
CHAPTER 59: Configure Departments

> **Note:**
> You only need to define departments responsible for hosting or servicing events in EMS.

This element is only used to link an event with a Department that either hosts or services a meeting (so they can send notifications & confirmations, track billing, and initiate invoices), so you do not need to define departments in EMS other than these. Typically, these are departments that absorb the cost of hosting events, and departments like A/V or Catering that provide services. All financial transactions in EMS are batched by department. Groups and customers make payments to one or more departments for the events they schedule at your organization's facilities

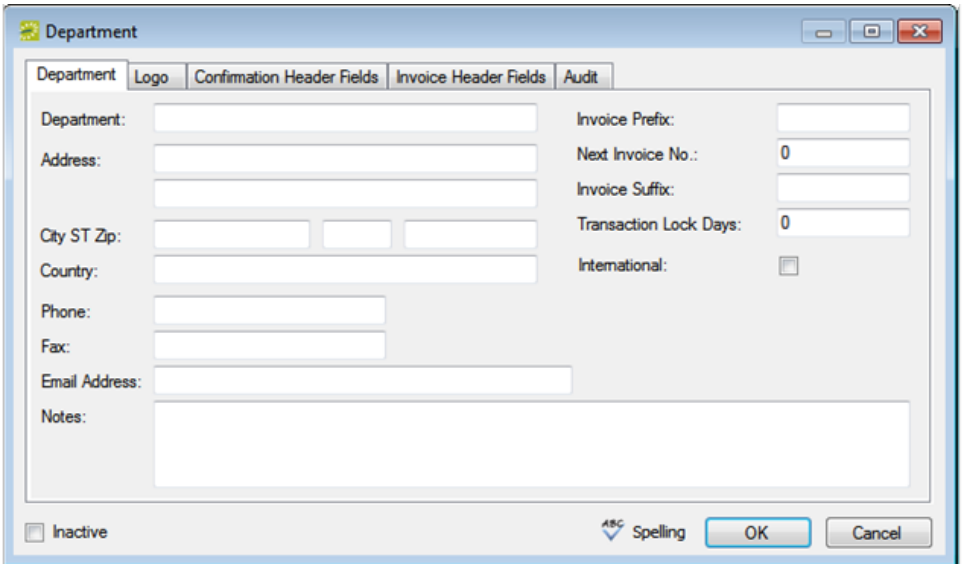
As the EMS administrator, you configure departments for your organization so they can notify attendees and send invoices linked to billing and PO numbers.

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



Departments Window

2. Click **New**. The Department dialog box opens. The **Department** tab is the active tab.



Department Dialog Box

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.
Transaction	The number of days after a transaction is generated that it can still be modified.

Field	Description
Lock Days	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 (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.

CHAPTER 60: Configure Statuses

A status automates the booking workflow, especially for booking requests that must be approved and then completed. A status is one of four core data items that you must configure so that your users can make reservations.

Note:
You can associate a status to reservations and to bookings, but only booking-level statuses affects room availability. Every booking must have a status.

You might want to configure your own statuses to automate the booking request workflow, such as "Confirmed," "Tentative," "Wait List," and "Canceled." 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:

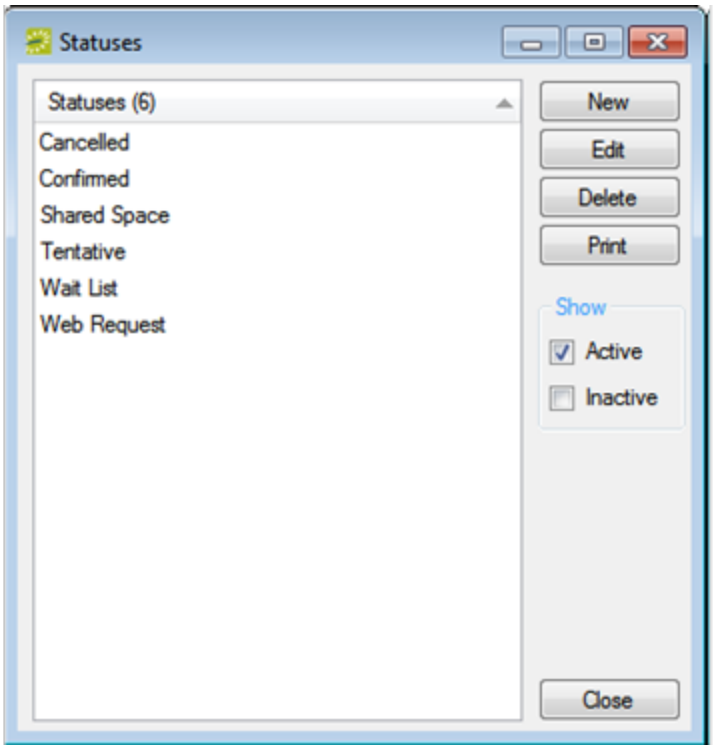
- Book Space
- Wait
- Info Only
- Cancel

Important!
Status type determines if a room remains available to other users.

The name that you assign to a status is 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, complete the following steps:

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.

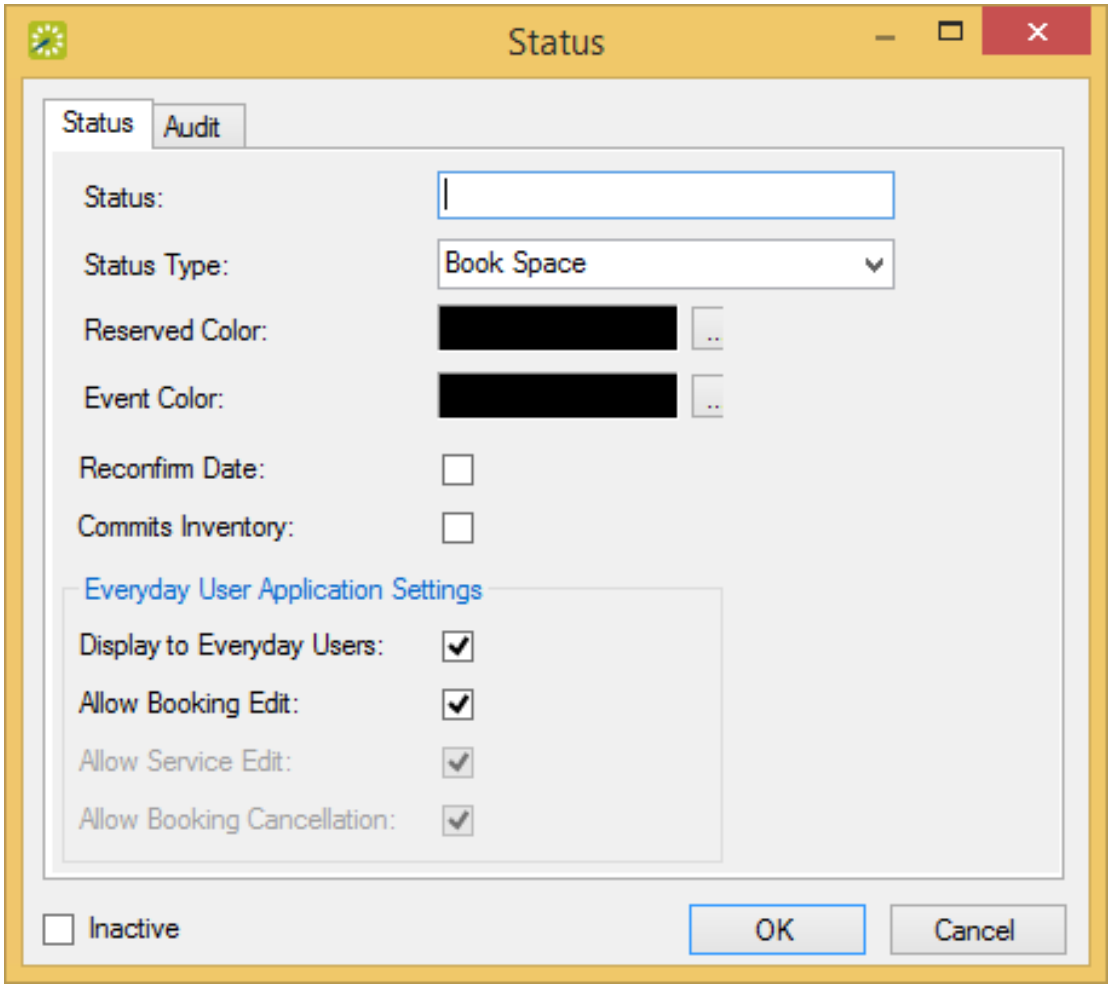


Statuses Window

Note:

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

2. Click **New**. The Status dialog box opens.



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.

Field	Description
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.
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.

Field	Description
	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.
EMS Web App Settings	
Display to Everyday Users	Select this option to display the event details for bookings with this status in EMS Web App. **Note:** For a booking to appear on Browse Events, the event type, status and room for that booking all have to have Display to Everyday User (DEDU) settings enabled. If one of these properties is not DEDU-enabled, the booking will not appear on Browse Events in the EMS Web App.
Allow Booking Edit	Select this option to allow the editing of bookings with this status in EMS Web App.
Allow Service Edit	Select this option to allow the editing of services for bookings with this status in EMS Web App.
Allow Booking Cancellation	Select this option to allow the canceling of bookings with this status in EMS Web App.

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

CHAPTER 61: Configure Notification Rules

Notification Rules determine which EMS users are emailed about additions or changes are made in EMS. You can set these rules to trigger for new or changed bookings or service orders, changes to VIP events, new Everyday User accounts, or when specific UDF options are selected. Triggers are based on rooms, statuses, event types, group types, setup types, and/or categories.

For a Notification to be generated, all the criteria in the rule must be met. Typically, notifications are an internal function for reservation schedulers and service providers, but when you are configuring a Notification Rule, you can specify the email address for whomever you want to receive an Email Notification.

This topic contains information on the following:

- Configure a Notification Rule
- Booking Notification Rules
- Service Order Notification Rules
- Notification Rules for Anything On A VIP Event
- New Everyday Users Notification Rules
- User Defined Field Notification Rules
- Select Users to Notify
- Select Rooms Requiring Notifications
- Select Booking Statuses Requiring Notifications
- Select Event Types Requiring Notifications
- Copy a Notification Rule



Note:

The EMS Email Notification Service must be installed and configured for Email Notifications to be sent. See the Email Notification Service Install Instructions for details.

The timing of notification emails also depends on settings in the following three EMS system parameters (see System Parameters):

- Exclude Building Closures on Notifications
- Exclude Weekends on Notifications

- Ignore Building Closure/Weekend Notification Settings Beyond xx Days

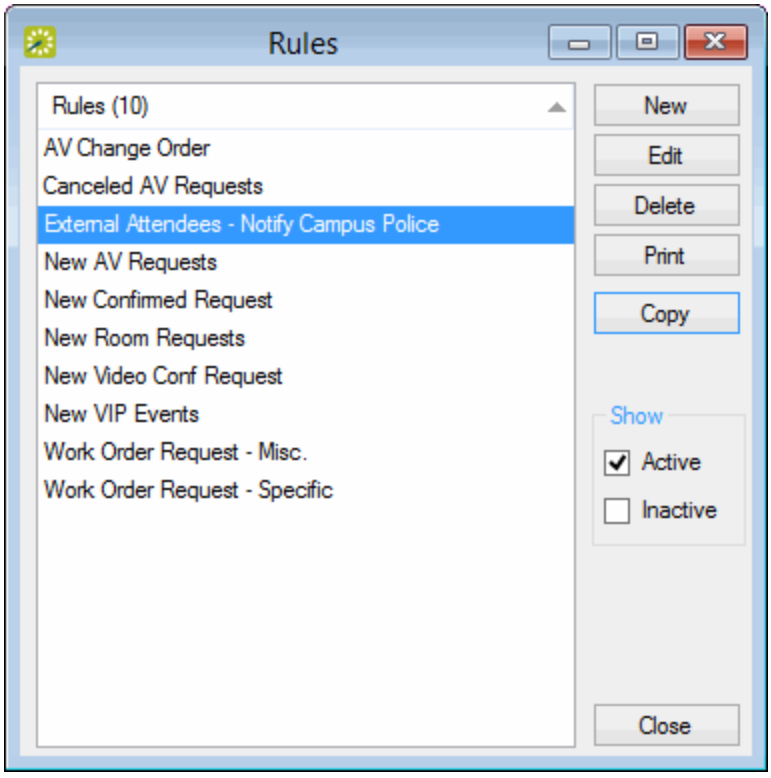
Concept: Why Set Notification Rules?

EMS enables you to set detailed rules that trigger when notifications are sent to people and groups. This highly customizable feature guides you through a series of screens where you fine-tune your notification rules so that notices are more meaningful and timely, and so that notices automatically go to the right people at the right time. You can set your rules to trigger notifications for specific people, rooms, event statuses, and event types. Take extra time with this step and revisit your rules regularly to make sure they are continuing to serve your needs.

Configure a Notification Rule

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

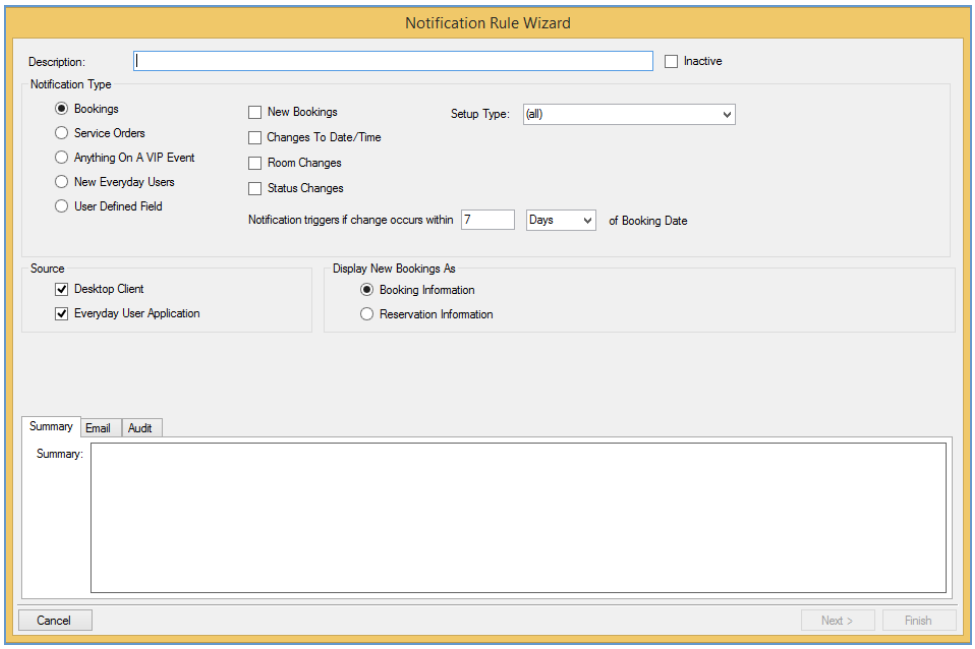
   The Rules window opens, listing all active Notification Rules configured in your implementation. To view any de-activated Rules, select **Inactive** in the Show section.



Rules Window

2. Click **New**.

   The Notification Rule Wizard opens.



Notification Rule Wizard

3. In the **Description** field, enter a name or description for the new Notification.
4. Leave the **Inactive** box unchecked to add the Notification Rule as an active Rule.
5. Select the **Notification Type**.

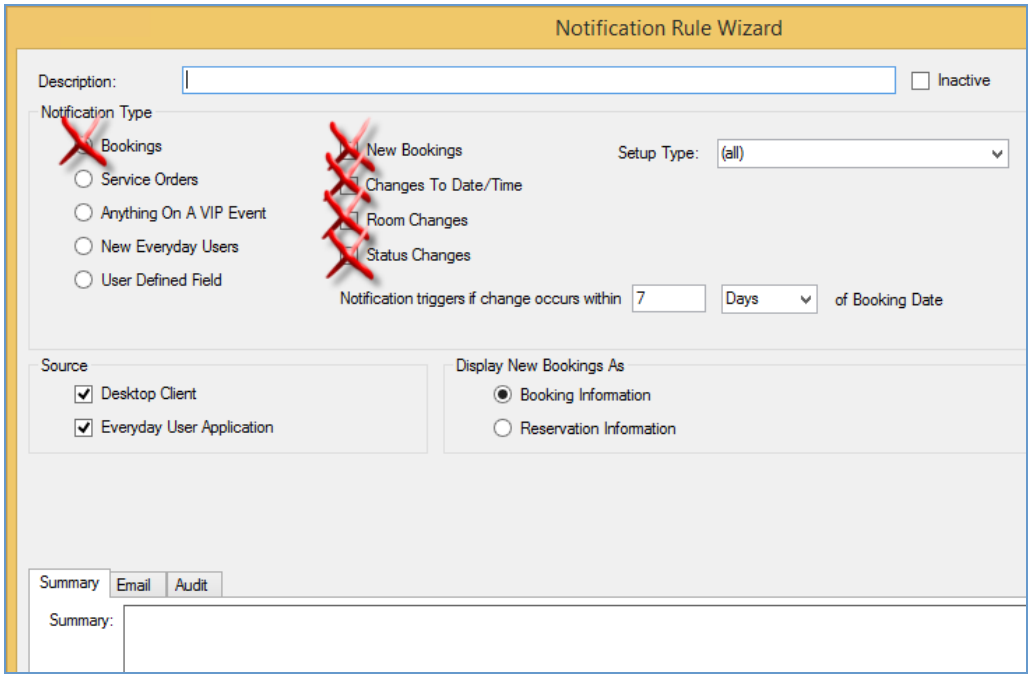
   Your selection in the **Notification Type** section can cause additional fields to become available. The following options are available in the **Notification Type** section:

   - Bookings (also includes New Bookings, Changes to Date/Time, Room Changes, and Status Changes)
   - Service Orders
   - Anything On A VIP Event
   - New Everyday Users
   - User Defined Field

Booking Notification Rules

Any of the following notification types are considered booking notifications and are available when creating new Notification Rules in the wizard:

- New Bookings
- Changes to Date/Time
- Room Changes
- Status Changes



1. In the **Setup Type** field of the Notification Rule Wizard, make a selection to ensure that changes to a booking's room setup will appropriately notify attendees.

   You can select *one of the existing setup types* or one of the options below:

   - **(all)**—The rule will trigger on all Setup Types.
   - **(any other than Room default)**—Notifications will trigger for all Setup Types except for the Room's default Setup Type. (To change the default Setup Type, you can go to **Configuration** > **Facilities** > **Rooms**, then select a Room and select **Edit**. Then make your changes in the **Default Setup Type** field.)

2. In the **Notification triggers if change occurs within** field, specify the time frame (in days or hours) leading up to the booking when notifications are generated. Enter a number and select **Days** or **Hours** from the drop-down list.

3. In the **Display New Booking As** section, specify whether the Notification occurs as **Booking Information** or **Reservation Information**.

For example, for new reservations that contain multiple bookings (recurring meetings), if **Booking Information** is selected, then a Notification occurs for every individual booking. If **Reservation Information** is selected, then a single Notification occurs for the entire reservation.

4. In the **Source** section, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

> **Note:**
> The Booking options described here only apply to EMS Enterprise. In EMS Professional, only one global Booking Notification can be configured at any time in your EMS database, and it is only available if a Booking Notification is not currently configured in your EMS database.

Service Order Notification Rules

Any of the following notification types are considered service order notifications:

- New Service Orders
- Changes to Service Orders
- Deleted/Canceled Service Orders

1. From the Category drop-down list, select the category for which the service order Notification is to be generated.

   If the appropriate category is not available, you can configure it. See Configure Categories.
   After selecting a category, the State, Grouping, and Resource options appear. You can select (all), (multiple), (none), or an individual item on the list. To notify on a whole category, keep the selections set to (all).

   - State—Select the corresponding state that you the Notification to trigger on. "New Service Orders" will have to start in that state. "Changes To Service Orders" will have to change into that state. More than one state can be selected.
   - Grouping—Select the grouping that a resource is in. These are set at the resource level in EMS. See Configure Groupings for a Resource.
   - Resource—Select an individual resource from the list.

> **Note:**
> When you choose a Group or Category, all three items (New Service Orders, Changes To Service Orders, and Deletion/Cancelation Of Service Orders) will become auto-selected. The notification will now only fire on all three. To set the rule to trigger notifications on only one or two of these three, you must select (all) on both Group and Category.

2. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the drop-down.

3. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

Notification Rules for Anything On A VIP Event

The **Anything On a VIP Event** option is available when creating a reservation in the Reservation Wizard. Select this option to notify users when any changes are made to a VIP Event.

New Everyday Users Notification Rules

Selecting the **New Everyday Users** option notifies users when a new Everyday User account is created. In the **Source** section, indicate whether additions and/or changes from the EMS Desktop Client, EMS Web App, or both should trigger a Notification.

User Defined Field Notification Rules

1. In **Type** field, select the User Defined Field type for which the Notification is to be generated.

   If the appropriate UDF is not available, you can configure it. See Configure User Defined Fields (UDFs).

2. Select the UDF for which the Notification is to be generated.

   Available UDFs have a field type of List. UDFs with other field types are not displayed on the User Defined Field drop-down list.

3. Select the UDF value for which the Notification is to be generated.

4. In the **Notification triggers if change occurs within** field, specify the time frame (in days or hours) leading up to the booking when notifications generate. Enter a number and select **Days** or **Hours** from the drop-down list.

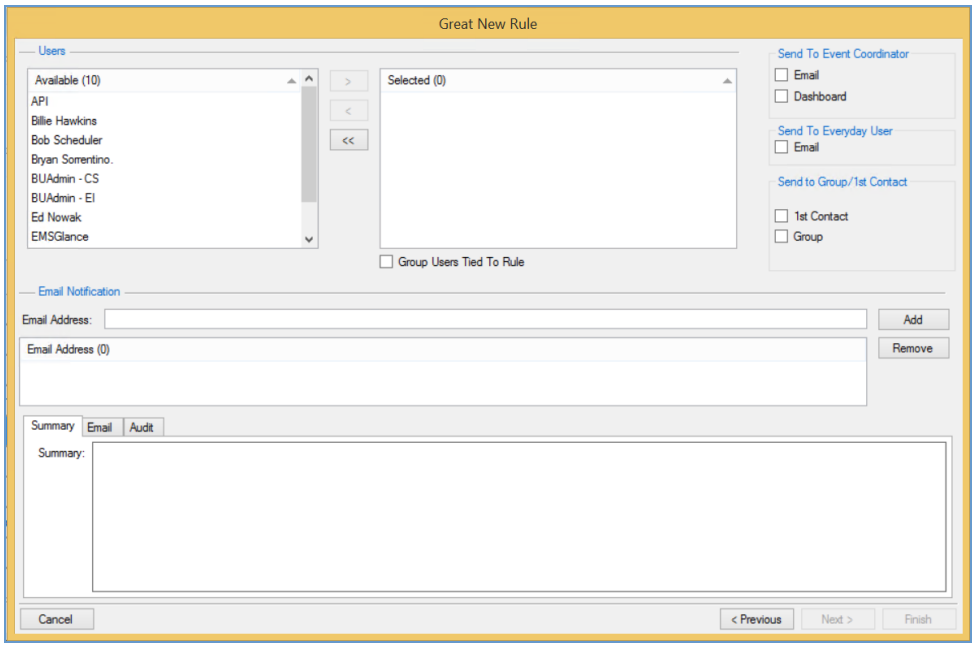
5. In the **Source** section, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

> **Note:**
> The Service Order options described here only apply to EMS Enterprise. In EMS Professional, only one service order Notification per category can be configured at any time in your EMS database.

Select Users to Notify

1. After you have finished configuring the **Notification Type**, click **Next**.

   The Users window opens.



2. Select users and email addresses to which to send notifications:

   a. 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 Configure Users.

   b. 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.
   OR
   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.

3. The following additional options are available on this screen:

   - **Group Users Tied To Rule**—This controls if and how users assigned to the notification rule are notified. If enabled, all users on the rule (applies only to Expert Users and not Everyday Users, nor email recipients) will function as a work group. This means that if any user assigned to the rule performs an action that would normally trigger the rule, then the rule will not be triggered and no dashboard or email notifications will be sent. If, however, this option is not selected and that user triggers it, the notifications will go to all the other users and email recipients designated on the Rule configuration.

   - **Send to Event Coordinator**—Send notifications to the Reservation Event Coordinator's email address or dashboard when checked.

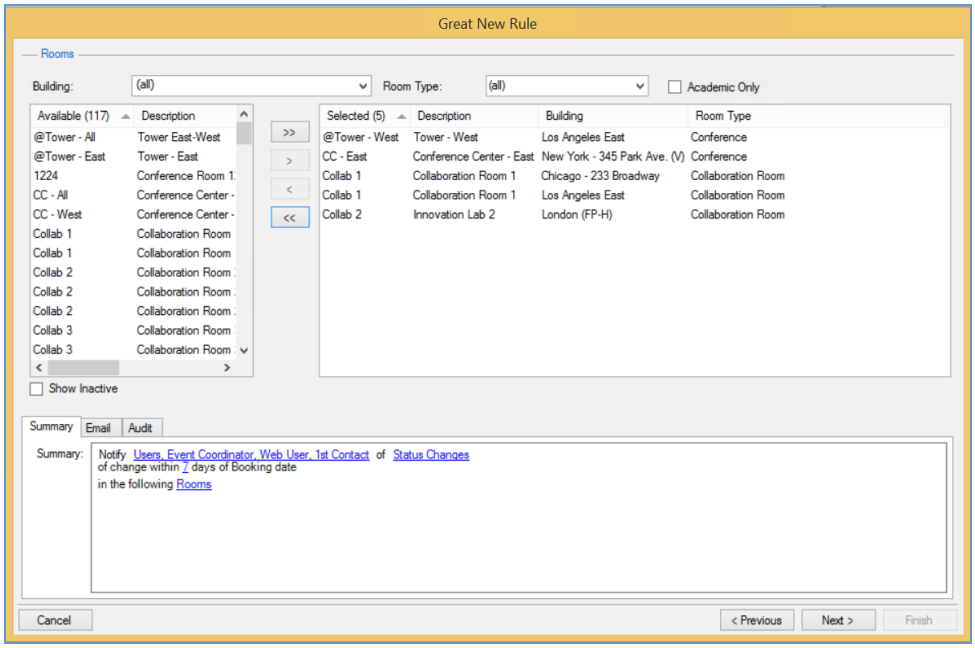
   - **Send To Everyday User**—Send notifications to the Everyday User's email address when checked.

   - **Send to Reservation Group/Contacts**—Send notifications to the first contact's email address, or the group's email address.

Select Rooms Requiring Notifications

1. If you have not selected New Everyday Users, click **Next**.

   The Rooms window opens.



2. Search for the rooms to which the Notification applies:

- From the **Building** drop-down list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.
- From the **Room Type** drop-down list, leave the default value of (all), or select a specific room type.

> **Note:**
> To search for active and inactive rooms, select Show Inactive.

> **Note:**
> If the appropriate building, area, room type, or view is not available, you can configure it. See Configuring Buildings, Configure Areas, Configure Room Types, and/or Configure Public Views.

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

   The Statuses window opens.

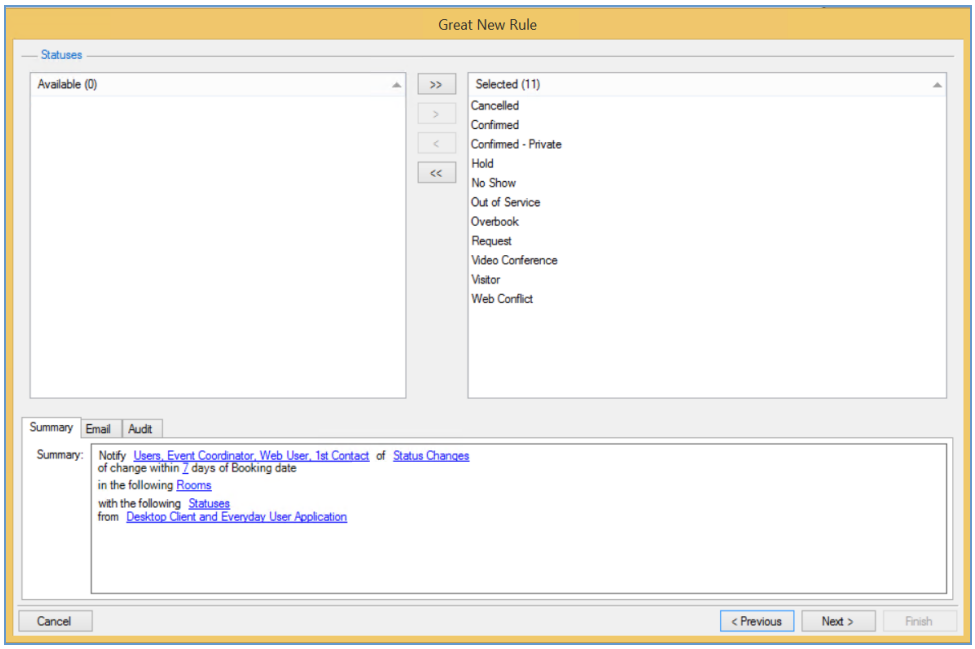
Select Booking Statuses Requiring Notifications

1. When you have finished selecting rooms, click **Next**.

   The Statuses window opens, where you can specify the status of an event that should trigger a notification.

2. Move (>) booking statuses (use CTRL-click to select multiple statuses) that should trigger a notification from the **Available** list to the Selected list.

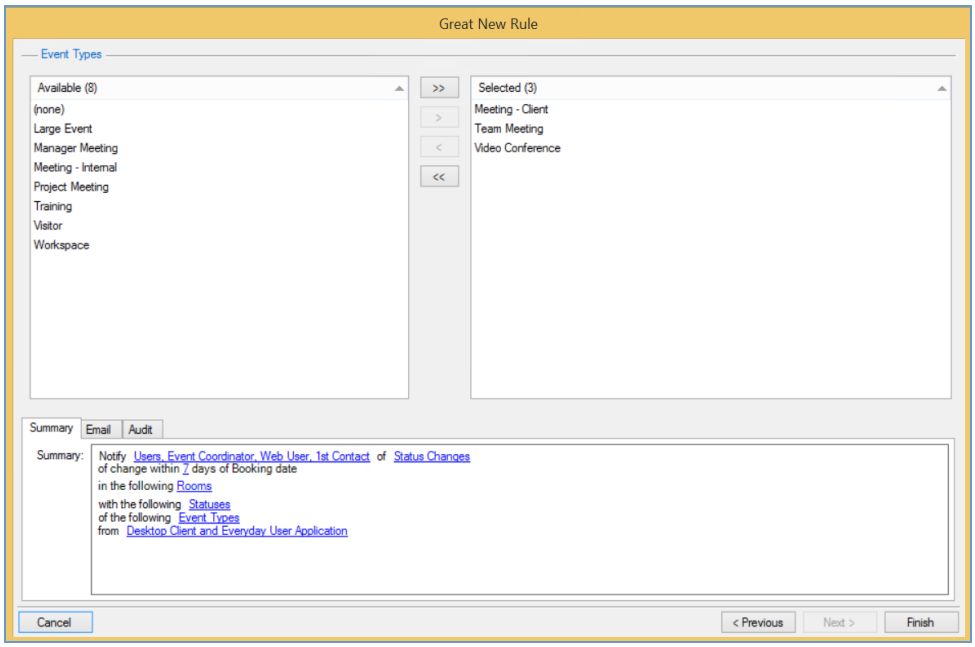
If the appropriate status is not listed, you can configure it. See Configure Statuses.



Select Event Types Requiring Notifications

1. When you have finished selecting booking statuses, click **Next**.

   The Event Types window opens, where you can specify the type of event that should trigger a notification.



2. Move (>) event types (use CTRL-click to select multiple statuses) that should trigger a notification from the **Available** list to the **Selected** list.

   If the appropriate event type is not listed, you can configure it. See Configuring Event Types.

3. Click **Finish**.

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

Copy a Notification Rule

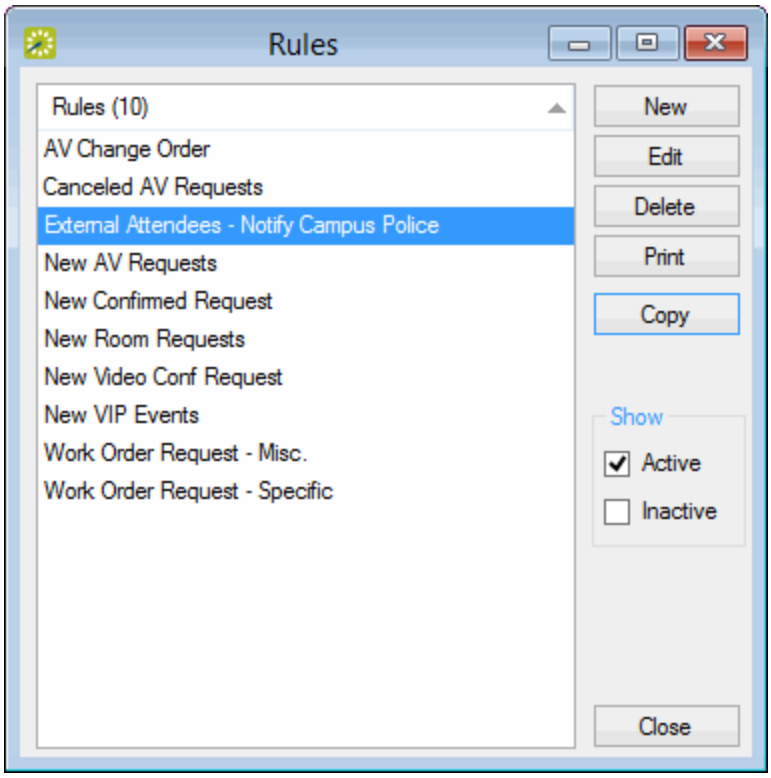
You can make a copy of an existing Notification Rule as follows:

1. On the Notification Rules screen, select the Notification Rule you want to copy.

2. Click the **Copy** button.

   The copied Rule will be completely the same as the previous one; however, the Description will have

the words "Copy of " added to the beginning of the name.



CHAPTER 62: Types of Notification Rules

This topic details the types of Notification Rules in EMS:

- Booking Notification Rules
- Service Order Notification Rules
- Notification Rules for Anything On A VIP Event
- New Everyday Users Notification Rules
- User Defined Field Notification Rules

Booking Notification Rules

Any of the following notification types are considered booking notifications and are available when creating new Notification Rules in the wizard:

- New Bookings
- Changes to Date/Time
- Room Changes
- Status Changes

1. The Setup Type field in the Notification Rule Wizard enables you to ensure that changes to a booking's room setup will appropriately notify attendees. You can select one of the existing setup types, or one of the options below.
    - (all) - The rule will trigger on all Setup Types.
    - (any other than Room default) - Notifications will trigger for all Setup Types except for the Room's default Setup Type. (To change the default Setup Type you can go to Configuration > Facilities > Rooms, then select a Room and click Edit; then make your changes in the "Default Setup Type" field.)
2. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the drop-down list.
3. The Display New Booking As field enables you to specify whether the Notification occurs as Booking Information or Reservation Information. For example, for new reservations that contain multiple bookings (recurring meetings), if Booking Information is selected, then a Notification occurs for every individual booking. If Reservation Information is selected, then a single Notification occurs for the entire reservation.
4. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

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> **Note:**
> The Booking options described here only apply to EMS Enterprise. In EMS Professional, only one global Booking Notification can be configured at any time in your EMS database and it is only available if a Booking Notification is not currently configured in your EMS database.

Service Order Notification Rules

Any of the following notification types are considered service order notifications:

- New Service Orders
- Changes to Service Orders
- Deleted/Canceled Service Orders

1. On the Category drop-down list, select the category for which the service order Notification is to be generated. If the appropriate category is not available, you can configure it. See Also: Configure Categories.
2. After selecting a category, the State, Grouping, and Resource options appear. You can select (all), (multiple), (none), or an individual item on the list. To notify on a whole category, keep the selections set to (all).
   - State—Select the corresponding state that you the Notification to trigger on. "New Service Orders" will have to start in that state. "Changes To Service Orders" will have to change into that state. More than one state can be selected.
   - Grouping—Select the grouping that a resource is in. These are set at the resource level in EMS. See Also: Configure Groupings.
   - Resource—Select an individual resource from the list.

> **Note:**
> When you choose a Group or Category, all three items (New Service Orders, Changes To Service Orders, and Deletion/Cancelation Of Service Orders) will become auto-selected. The notification will now only fire on all three. To set the rule to trigger notifications on only one or two of these three, you must select (all) on both Group and Category.

3. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the drop-down list.
4. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

Notification Rules for Anything On A VIP Event

VIP Event is an option available when creating a reservation in the Reservation Wizard. Select this option to notify users when any changes are made to a VIP Event.

New Everyday Users Notification Rules

Select this option to notify users when a new everyday user account is created. For Source, indicate whether additions and/or changes from the EMS Desktop Client, EMS Web App, or both should trigger a Notification.

User Defined Field Notification Rules

1. In Type field, select the User Defined Field type for which the Notification is to be generated. If the appropriate UDF is not available, you can configure it. See Also: Configure User Defined Fields (UDFs).
2. Select the UDF for which the Notification is to be generated. (Available UDFs have a field type of List. UDFs with other field types are not displayed on the User Defined Field drop-down list.)
3. Select the UDF value for which the Notification is to be generated.
4. Next to the Notification triggers if change occurs within... field, you can specify the time frame (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the drop-down.
5. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.



Note:

The Service Order options described here only apply to EMS Enterprise. In EMS Professional, only one service order Notification per category can be configured at any time in your EMS database.

CHAPTER 63: Configure 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.

Note:
Configuring Group Notification Rules is similar to configuring notification rules for individuals. If you are familiar with this process, you can apply the same rules for groups.

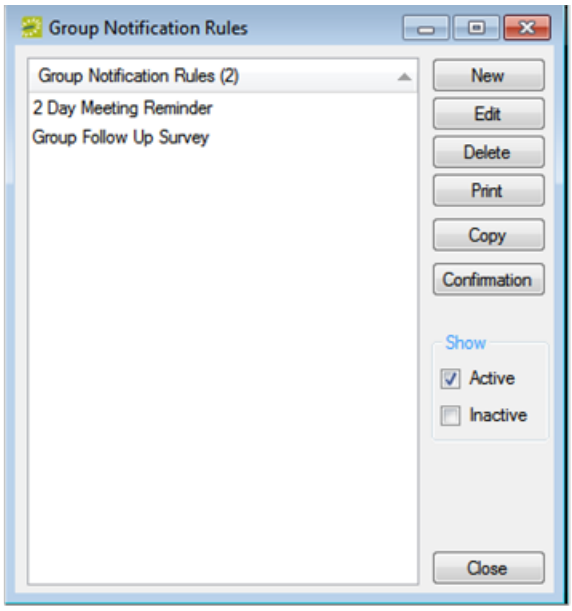
You can configure multiple group notifications in EMS Enterprise. You can configure only a single group notification in EMS Professional. For notification emails to be sent, the EMS Email Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

This section contains information on the following:

- Configure a Group Notification
- Set the Confirmation Rules for a Group Notification Email

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.

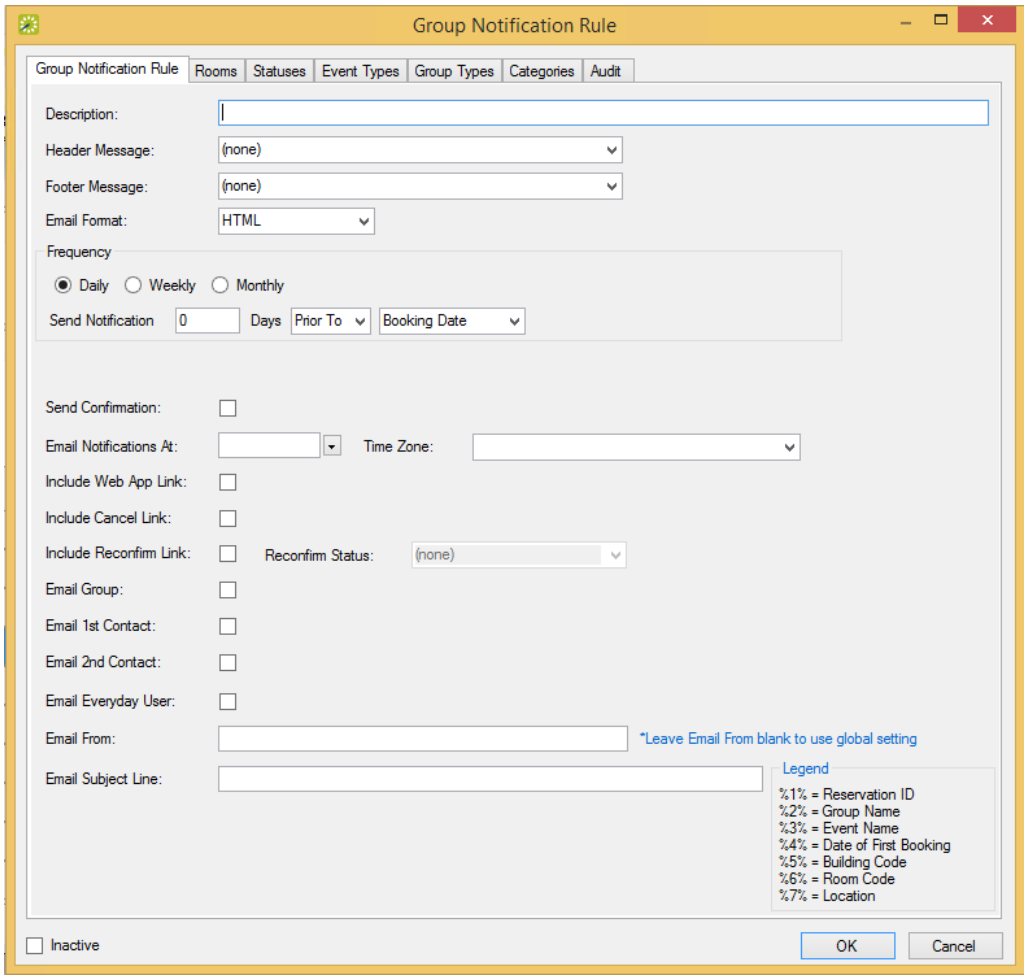


Note:

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.



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.

Option	Description
	Note: If the appropriate message is not available, you can configure it. See Configuring Messages.
Email Format	Select the format (HTML or Plain Text) for the email.
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.
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.

Option	Description
	Note: If the appropriate status is not available, you can configure it. See Configure Statuses.
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 Configure Groups, Configure Contacts, and/or Configure Everyday Users.
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.
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.

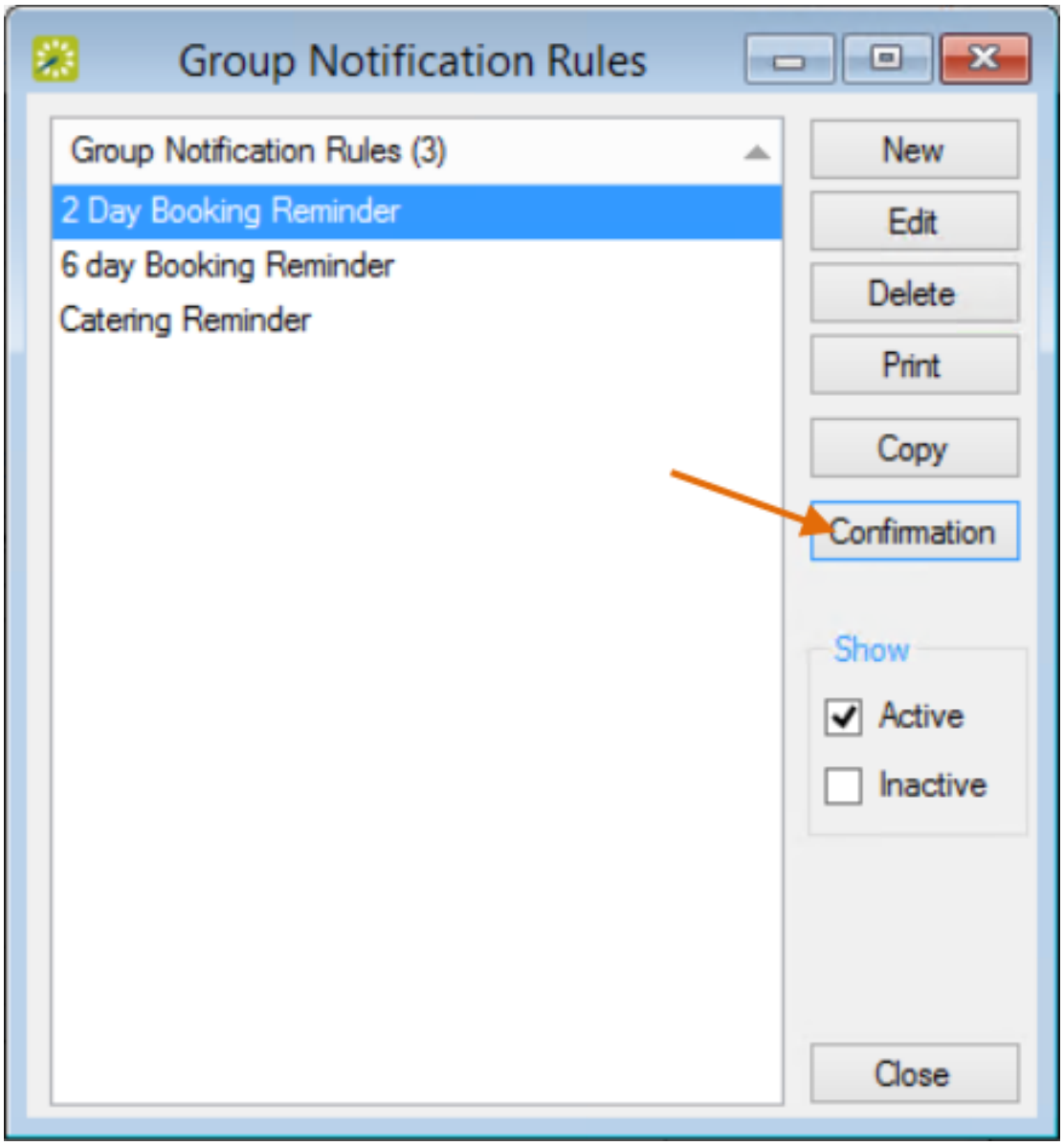
4. Do one or more or all the following to set the criteria that triggers the generation of the notification:
   - Open the Rooms tab, you can search for the rooms by Building and Room Type. On the Available list, select rooms, (CTRL-click to select multiple rooms), and then Move them (>) to the Selected list.
   - Open the Statuses tab, and specify statuses that should trigger notifications.
   - Open the Event Types tab, and specify event types that should trigger notifications.

- Open the Group Types tab, and specify group types that should trigger notifications.
- Open the Categories tab, and specify categories that should trigger notifications.

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 the next section.

Set the Confirmation Rules 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.



3. Specify the settings for the confirmation. At a minimum, you must specify buildings and statuses. All other information is optional.
   - 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, Configure Areas, and/or Configure Public Views.

- 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 Configure Categories.

- 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 Configure Statuses.

- Options tab—Format settings for a printed confirmation. See the following table for option descriptions.

Field	Description
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.
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.

Field	Description
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.

EMS Web App Options Tab—Select your settings for EMS Web App. See the following table for option descriptions.

Field	Description
Display Web App Link	Select this option to include a link (URL) to the reservation in EMS Web App.
Web App Link Message	The message that is to be included with the link.



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

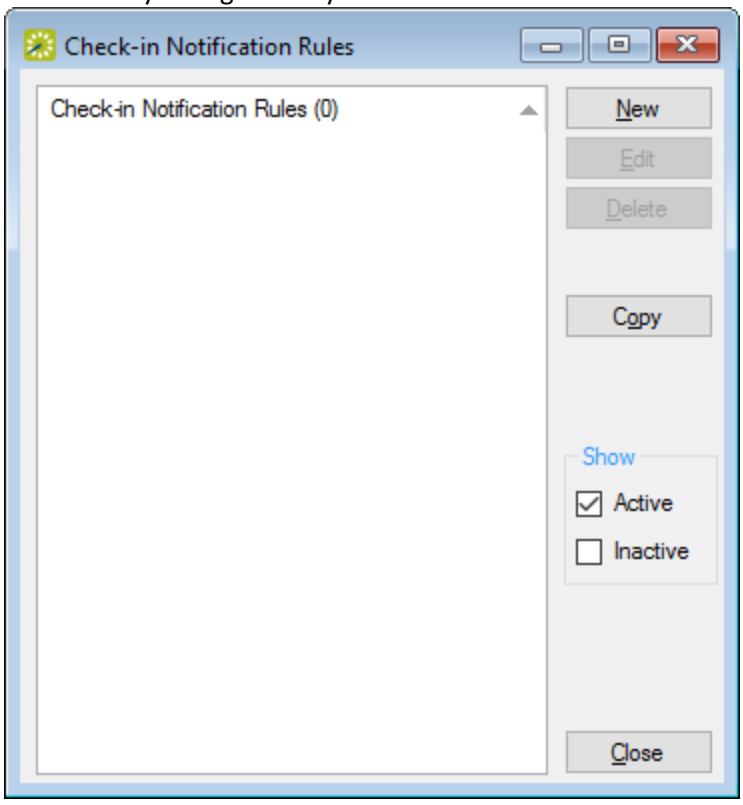
4. Click **OK**. The Confirmation Settings dialog box closes. You return to the Group Notification Rules window with the notification rule still selected.

CHAPTER 64: Configure Check-in Notification Rules (Excludes Professional)

Check-in Notification Rules help you automate the process of reminding users to check in and managing no-shows. You configure Check-in Notification rules based on rooms, statuses, event types, and/or group types. When you configure a Check-in Notification rule, you can configure it generate an email to remind users to check in and to cancel no-showed events. To do this for group bookings, all the criteria you specify with these rules 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.

Note:
For notification emails to be sent, the EMS Check-in Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

1. On the menu bar, navigate to **Configuration** > **Administration** > **Check-in Notification Rules**. The Check-in Notification Rules dialog box opens. This window lists all the check-in notification rules that are currently configured in your EMS database and that have a status of Active.



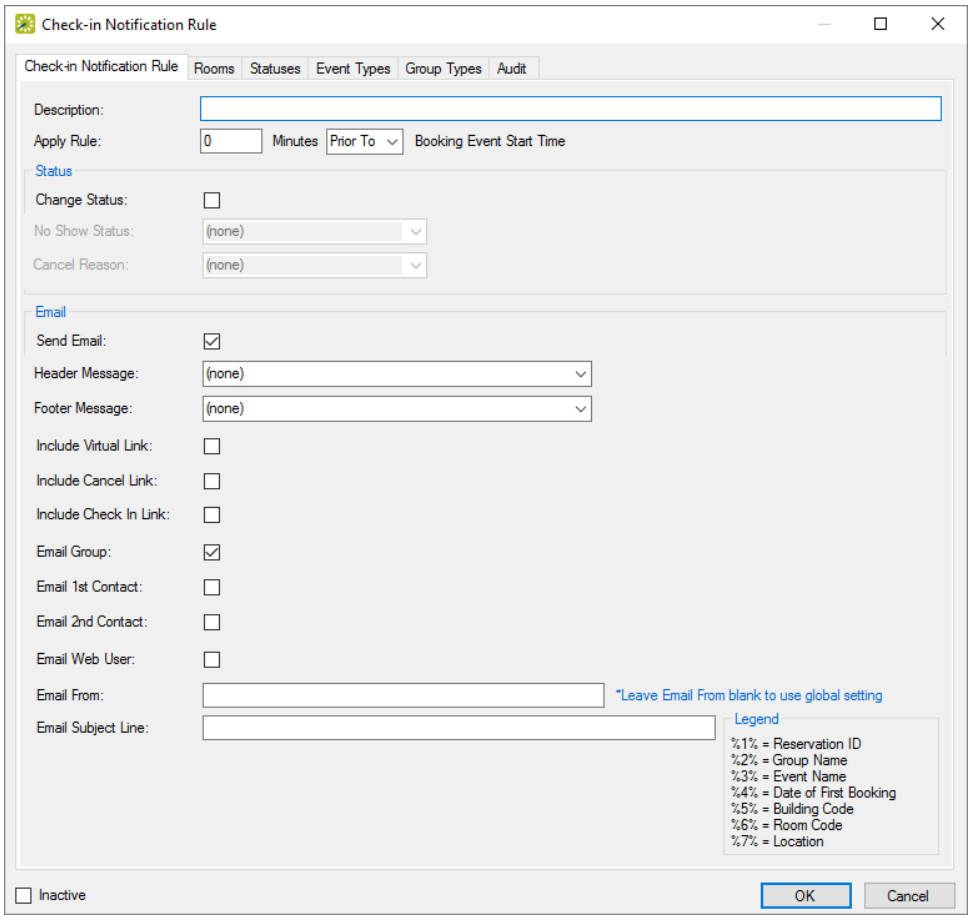
Check-in Notification Rules Dialog Box

Note:

You can view all Check-in notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a Check-in notification rule "from scratch." You can also configure a Check-in 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 Check-in Notification Rule dialog box opens. The **Check-in Notification Rule** tab is the active tab.



Check-in Notification Rule Dialog Box

3. Enter the information for the new Check-in 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.
Apply Rule	When to apply the rule; this determines when the Check-in notification rule will be applied and trigger. This can be either before or after the Booking Event Start Time.
Change Status	Select this option if the group's bookings are to be changed to the status selected on the No Show Status drop-down list. **Note:** If the appropriate status is not available, you can configure it. See Configuring Statuses.
No Show Status	The status to which the group's bookings are changed if the group "no-shows" (do not check in within the allotted time).
Cancel Reason	Optional; available only if the No Show Status is a Cancel Status type. Select a reason for canceling the "no-show" group. **Note:** If the appropriate cancel reason is not available, you can configure it. See Configuring Cancel Reasons.
Send Email	If this box is checked it will send a notification email to the selected party/parties (Group, 1st Contact, 2nd Contact, Everyday User).
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every Check-in notification that is sent.

Option	Description
	Note: If the appropriate message is not available, you can configure it. See Configuring Messages.
Include Virtual Link	Includes a link to the reservation summary in Virtual EMS.
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 Check-in notification is to be sent. **Note:** If the appropriate group, contact, and/or web user is not available, you can configure it. See Configure Groups, Configure Contacts, and/or Configure Everyday Users.
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 %3%” would result in “Notification for Consumer Electronics Association” being displayed in the subject line if "Consumer Electronics Association" was the name of the event.

4. Do one or more or all the following to set the criteria to trigger a notification:
   - Open the **Rooms** tab and do the following to search for the rooms for which the notification is to apply:
   - On the Building drop-down list, select one of the following—(all) buildings, a specific building, a specific area, or a specific view.

> **Note:**
> If the appropriate group, contact, and/or web user is not available, you can configure it. See Configure Groups, Configure Contacts, and/or Configure Everyday Users.

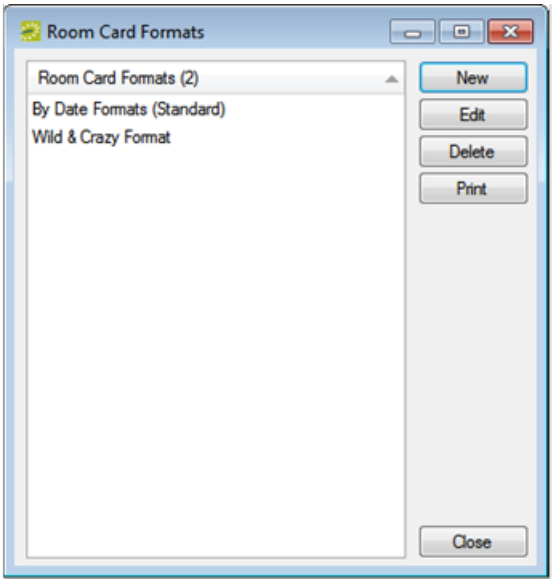
   - On the Room Type drop-down list, leave the default value of (all), or select a specific room type.
   - On the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list. If the appropriate room type is not available, you can configure it.
     See Configure Room Types.
   - 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 type is not available, you can configure it.
     See Configure Room Types.
   - 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 Configure Room Types.
   - 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 Configure Room Types.

5. Click **OK**. The Check-in Notification Rule dialog box closes. You return to the Check-in Notification Rules dialog with the newly configured notification rule automatically selected.

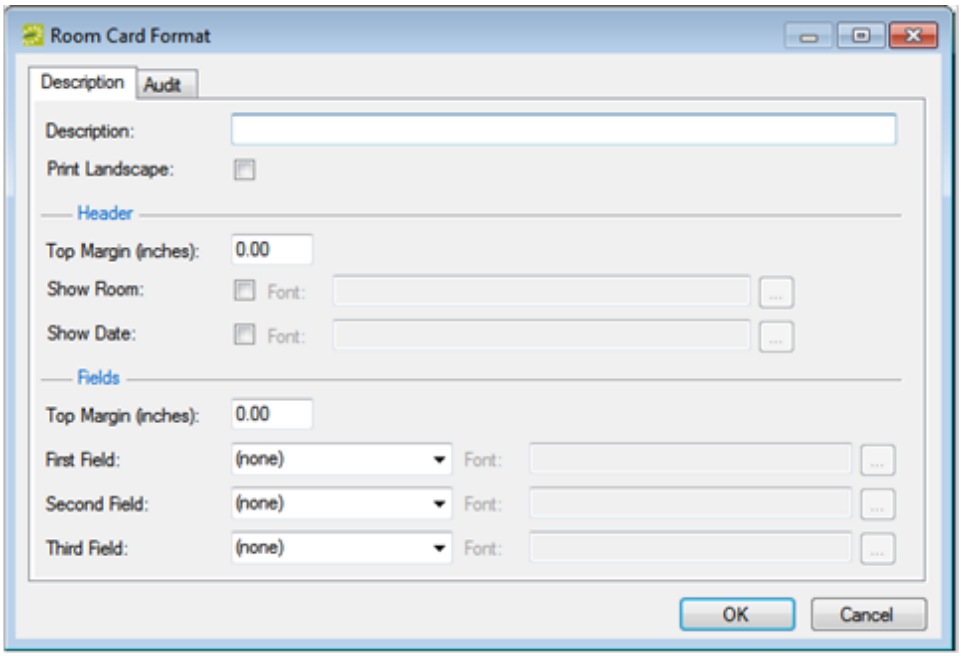
CHAPTER 65: Configure Room Card Formats

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.

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)**.



2. Click **New**. The Room Card Format dialog box opens.



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

Room Card Format Fields

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 drop-down 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 drop-down list, select the font in which

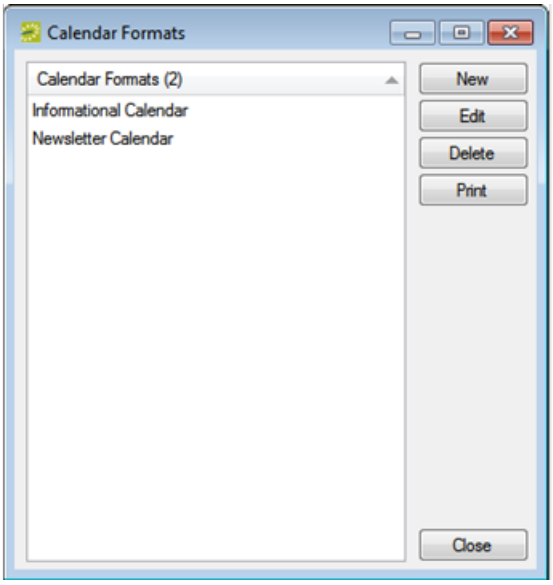
Field	Description
	the date is to be printed.
Fields	• Top Margin (inches) — Specify the top margin in inches between the room and/or date field and the first field in the report. • First Field/Second Field/Third Field — Specify the fields that are to be displayed on the report as well as the font in 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.

CHAPTER 66: Configure Calendar Formats

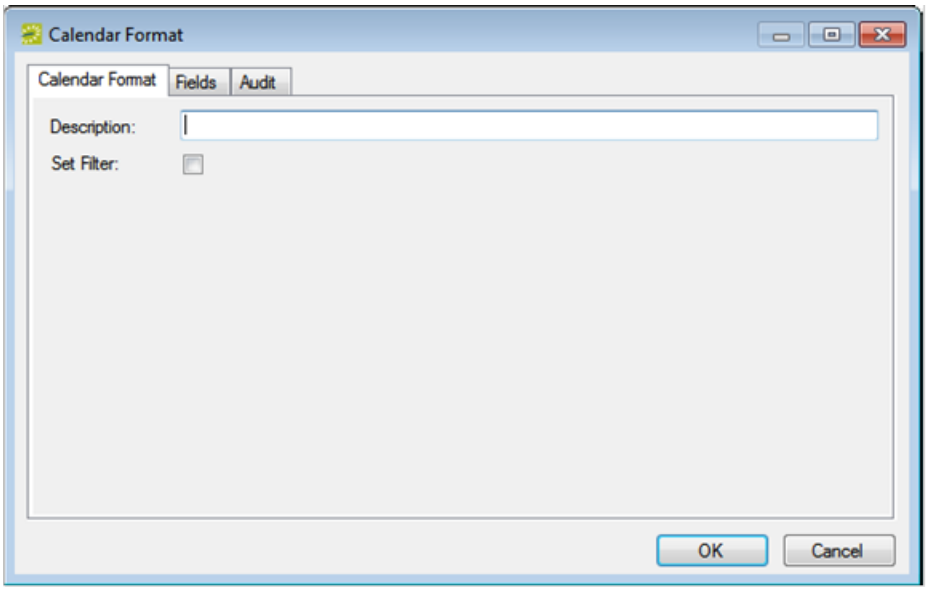
You can configure calendar formats, which determine the data items that are printed for an event on the Event Calendar report, for example, Group, Event Time, and Event Location.

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.



Calendar Formats Window

2. Click New. The Calendar Format dialog box opens. The Calendar Format tab is the active tab.

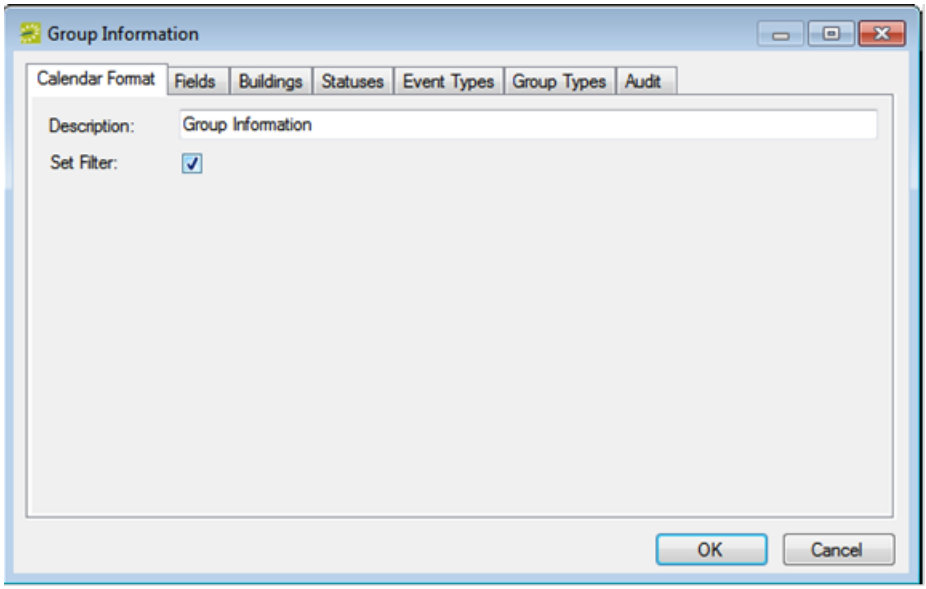


Calendar Format Tab

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

> **Note:**
> 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:



Calendar Format Tab 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.

> **Note:**
> If the appropriate building, area, and/or view is not available, you can configure it. See Configuring Buildings, Configuring Areas, and/or Configuring Public Views.

- 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.

> **Note:**
> If the appropriate status is not available, you can configure it. See Configuring Statuses.

- 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.

> **Note:**
> If the appropriate event type is not available, you can configure it. See Configuring Event Types.

- 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.

> **Note:**
> If the appropriate group type is not available, you can configure it. See Configuring Group Types.

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.

> **Note:**
> 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.

CHAPTER 67: Configure Reservation Wizard Templates

The reservation wizard templates 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."

> **Note:**
> Your users can always over-write the default values you set here when they use the Reservation Wizard.

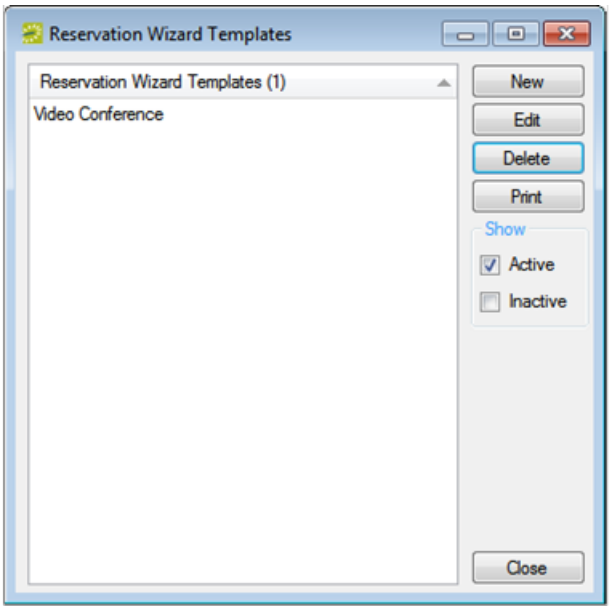
This topic includes information on the following:

- Configure the Reservation Wizard Template
- Set Default Event Information for a Reservation Wizard Template
- Set Default Room Features for a Reservation Wizard Template
- Set User-Defined (UDF) Field Values for a Reservation Wizard Template

Configure the Reservation Wizard Template

To configure the Reservation Wizard Template, complete these steps:

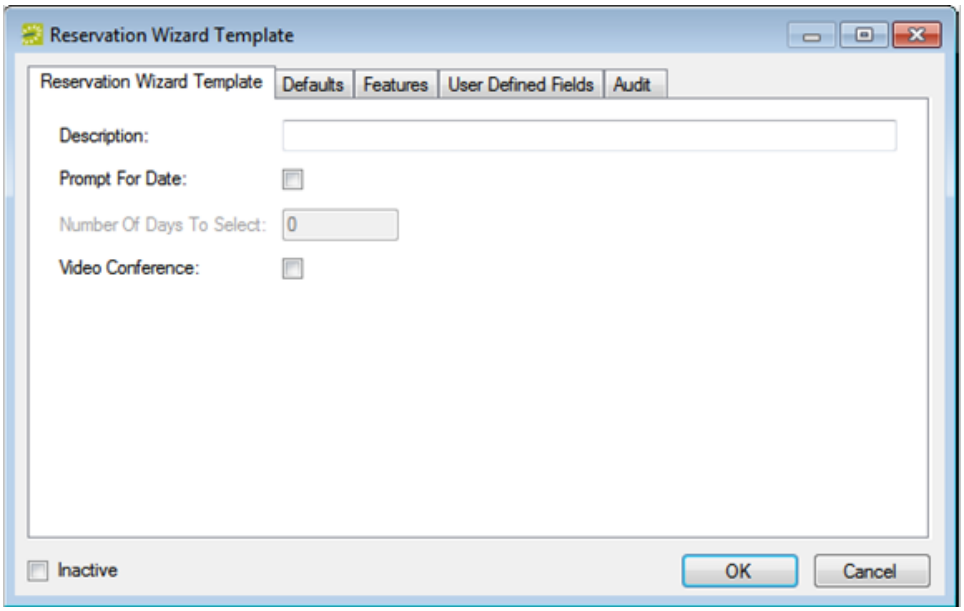
1. On the EMS Workplace menu bar, click **Configuration** > **Administration** > **Reservation Wizard Templates**. The Reservation Wizard Templates window opens. This window lists all the reservation wizard templates that are currently configured in your EMS database and that have a status of Active.



Reservation Wizard Template Window

> **Note:**
> 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.



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

> **Note:**
> 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.

Reservation Wizard Fields

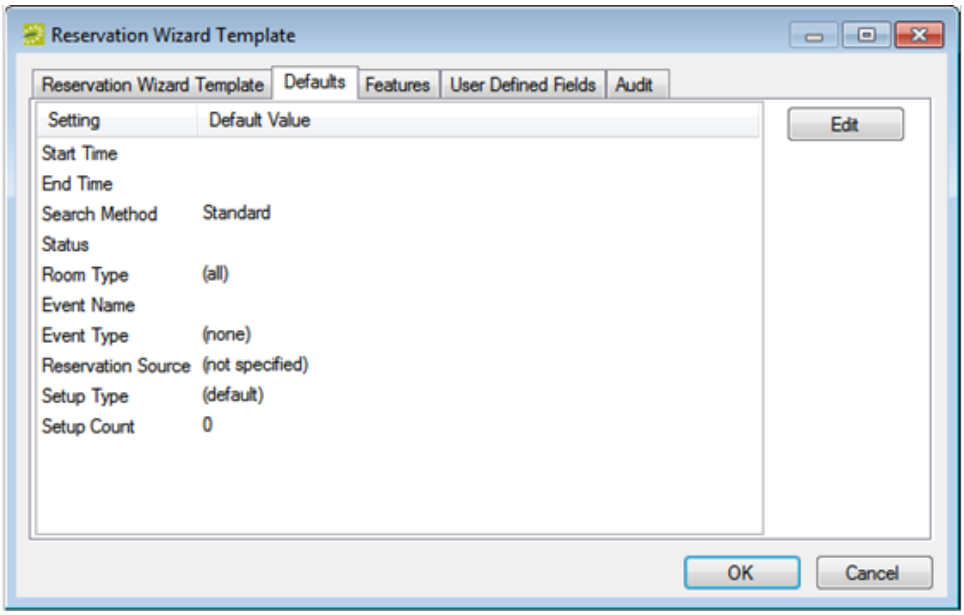
Field	Description
Description	Required field. The name or description of the reservation wizard template. **Note:** This is the only required information for the group. All other information on all tabs is optional and can be added at a later date when needed. The description can be a maximum of 50 characters, including spaces.
Prompt for Date Number of Days to	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.

Field	Description
Select	
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. 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.

Set Default Event Information for a Reservation Wizard Template

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring.
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.



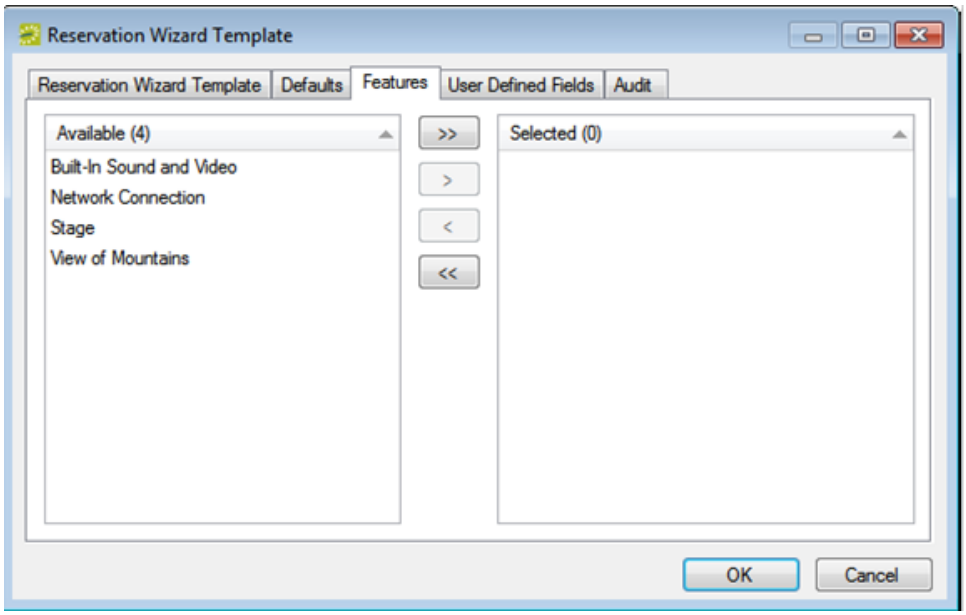
3. Continue with any other optional configuration for the template as needed; otherwise, click **OK** to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

Set 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.

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.



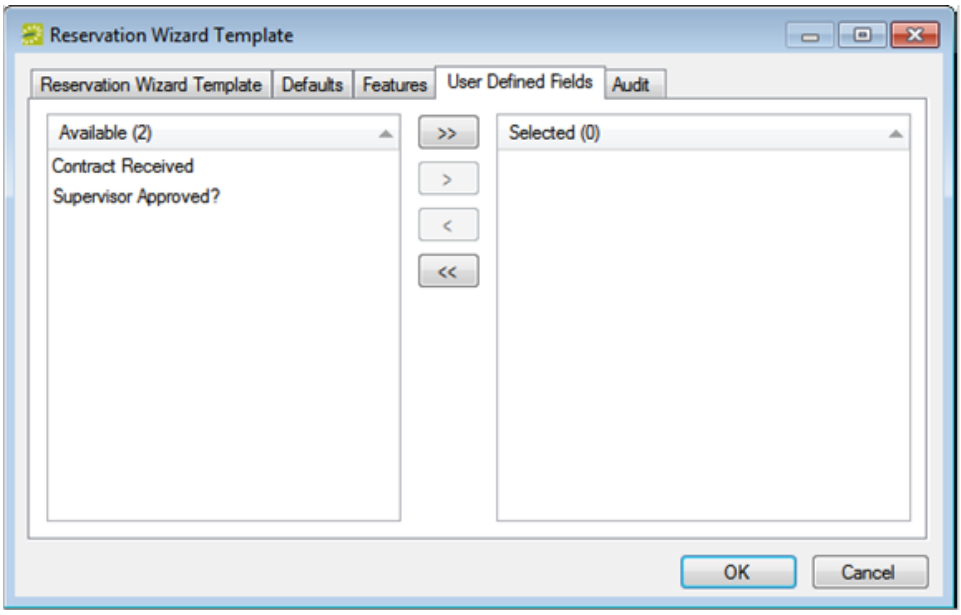
3. Continue with any other optional configuration for the template as needed; otherwise, click **OK** to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

Set User-Defined (UDF) Field Values 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.

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.



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.

CHAPTER 68: Configuration > Other

This section guides you in configuring other data types, under **Configuration** > **Other**.

From the **Configuration** > **Other** menu, you can access and configure the following data types:

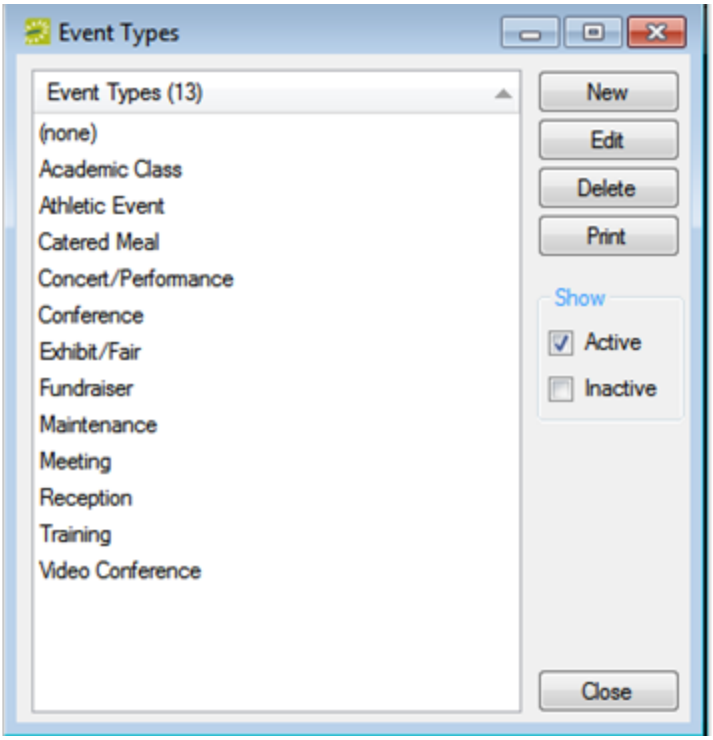
- Event Types
- Group Types
- Reminder Types
- Comment Types
- Messages
- Special Dates or Holidays
- User Defined Fields (UDFs)
- Reservation Sources
- Cancel Reasons
- Attachment Types
- Word Merge Documents (Optional Module)
- Calendar Styles

CHAPTER 69: Configure 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, follow these steps:

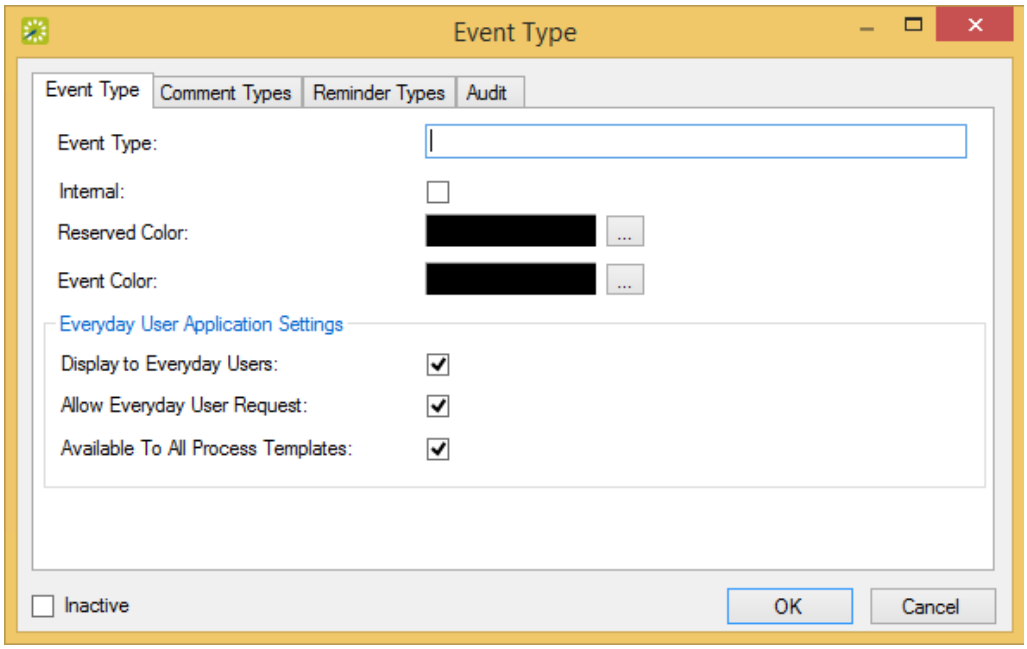
1. On the EMS menu bar, click **Configuration** > **Other** > **Event Types**. The Event Types window opens. This window lists all the event types that are currently configured in your EMS database and that have a status of Active.



Event Types Window

> **Note:**
> 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.



Event Type Dialog, Event Tab

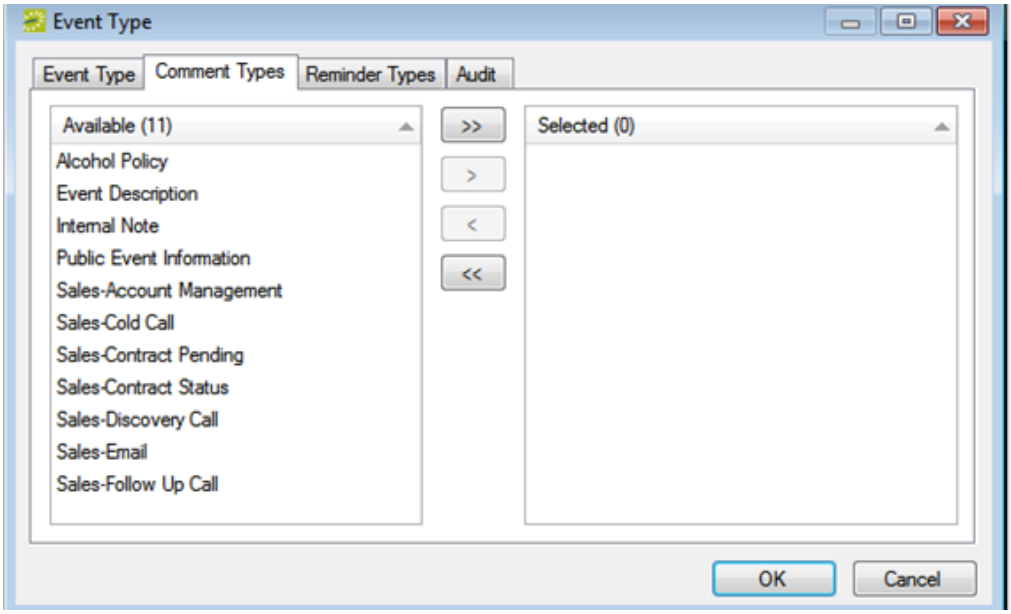
3. Enter the information for the new event type.

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	Select the color that is to be used in the Navigator and in the Reservation Book to

Field	Description
Color	indicate this type of event. **Important!** As of Update 22, you can view the event type color and status color simultaneously from the Reservation Book. See Also: Using the Reservation Book. **Note:** Lighter colors are a better choice so as not to obscure the reservation/booking name.
EMS Web App Settings	
Display to Everyday Users	Indicates that events of this type are to be displayed when a user browses for events in EMS Web App. **Note:** For a booking to appear on Browse Events, the event type, status and room for that booking all have to have Display to Everyday User (DEDU) settings enabled. If one of these properties is not DEDU-enabled, the booking will not appear on Browse Events in the EMS Web App.
Allow Guest Request	Indicates that this event type is an available option in EMS Web App when requesting a room.
Available to All Process Templates	Select this option to assign this event type to all everyday user process templates.
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 reser-

vation with this event type, and then click the Move button (>) to move the selected comment types to the Selected list.

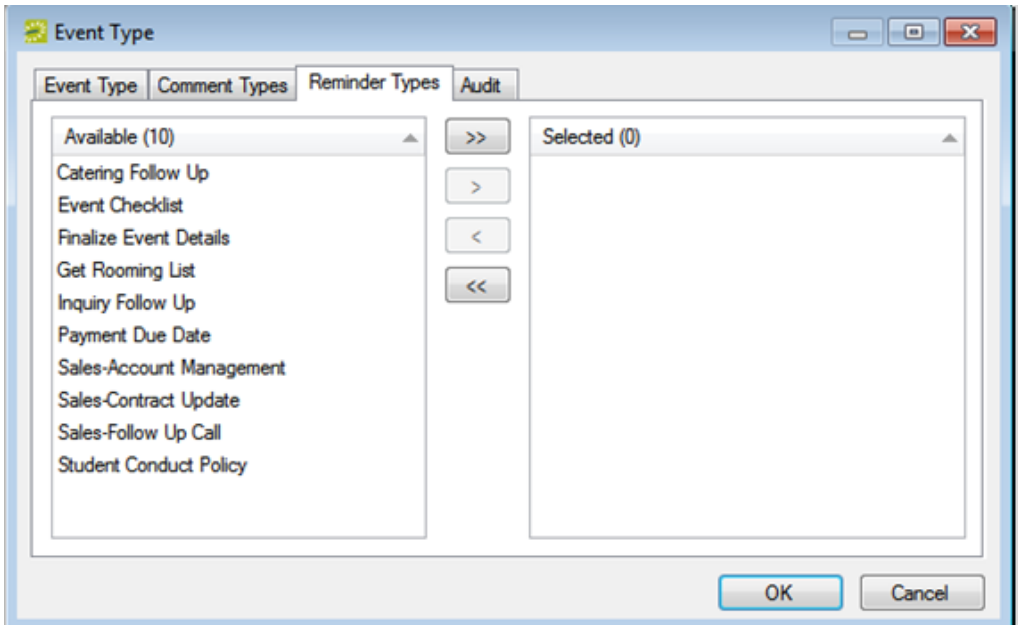


Event Type Dialog, Comment Types Tab

Note:

If the appropriate comment type is not available, you can configure it. See Configure Comment Types.

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.



Reminder Types Tab of the Event Type Dialog

Note:
If the appropriate reminder type is not available, you can configure it. See Configure Reminder Types.

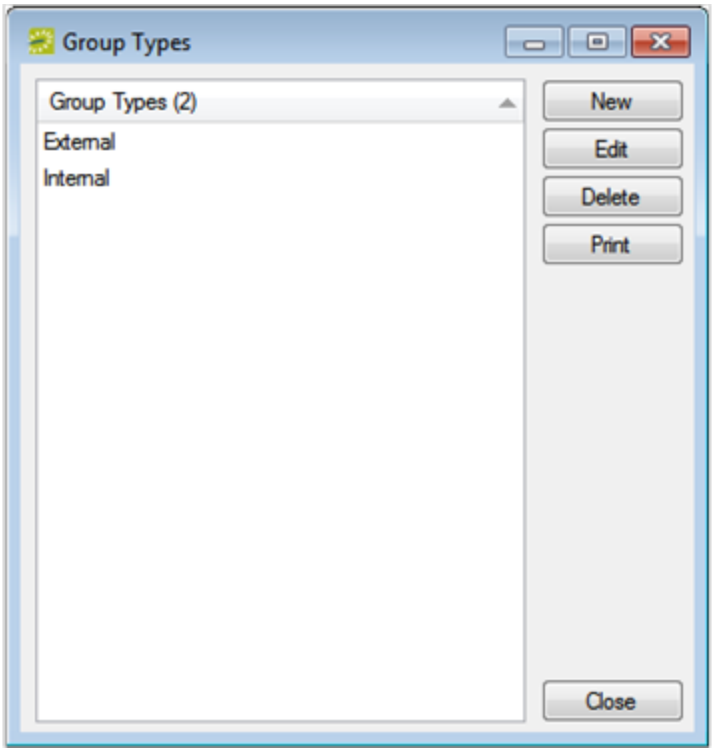
6. Click **OK**. The Event Type dialog box closes. You return to the Event Types window with the newly configured event type automatically selected.

CHAPTER 70: Configure 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.

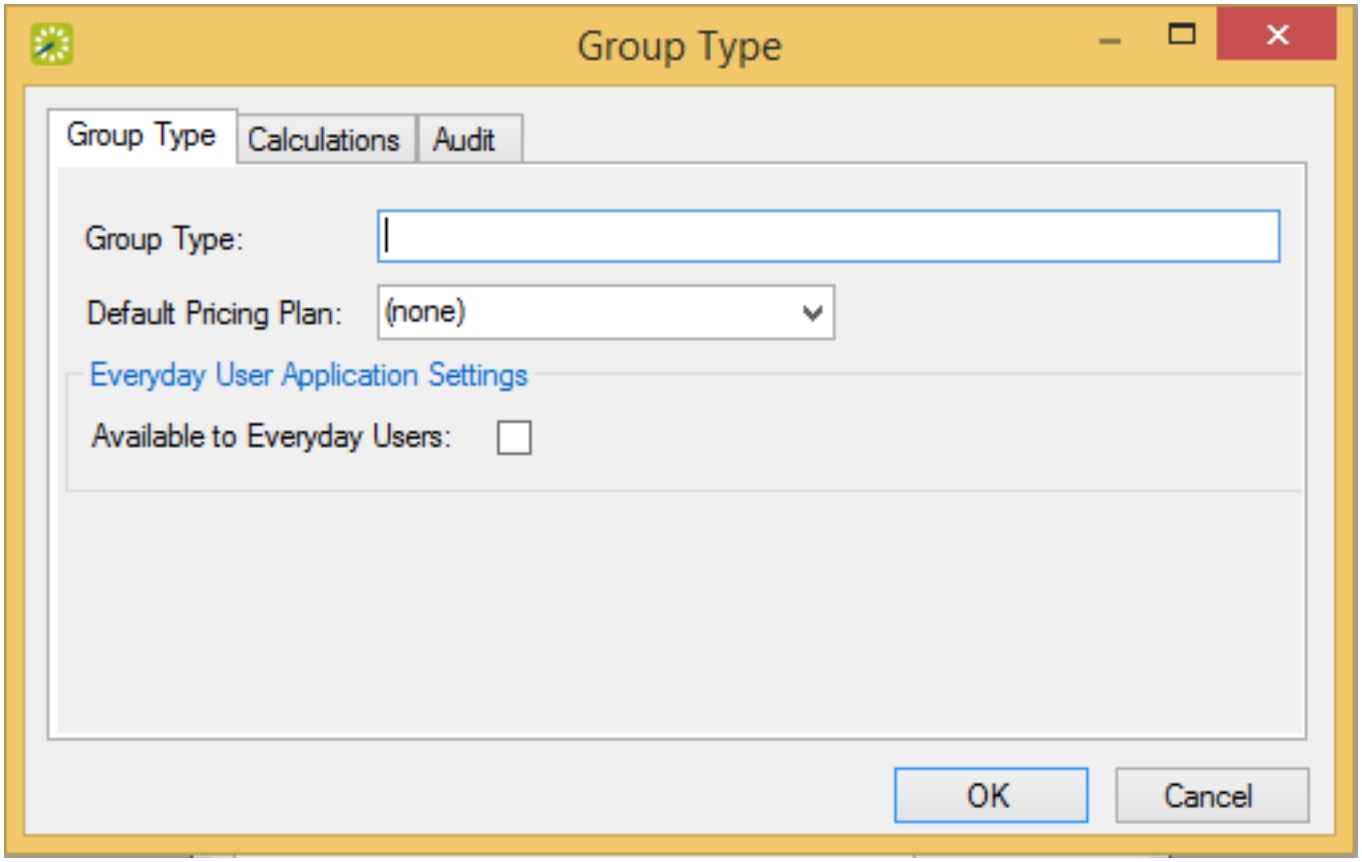
To configure group types, follow these steps:

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.



Group Types Window

2. Click **New**. The Group Type dialog box opens. The **Group Type** tab is the active tab.



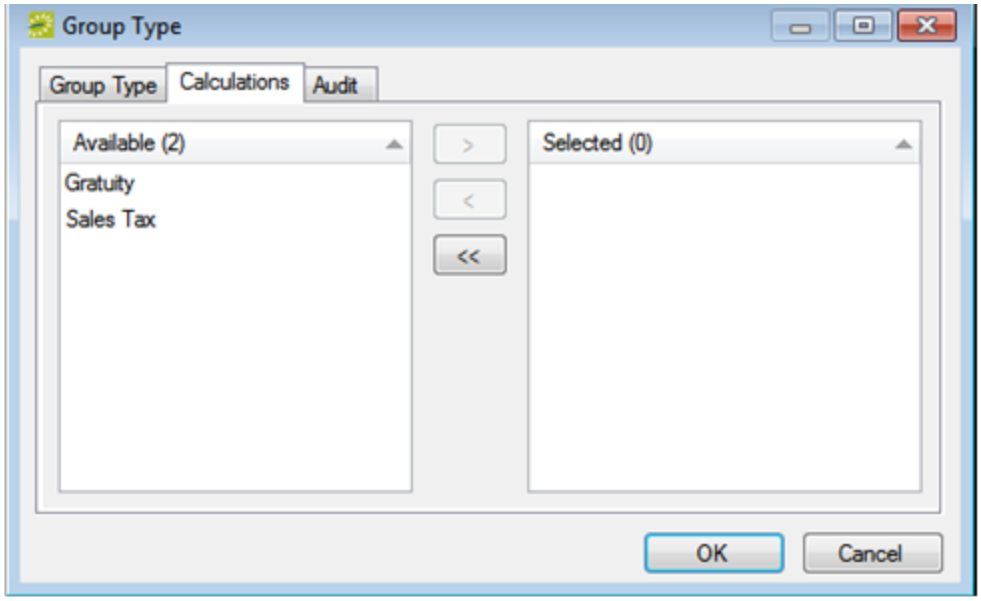
Group Type Tab of the Group Type Dialog

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.

Field	Description
	Note: If the appropriate pricing plan is not available, you can configure it. See Configuring Pricing Plans.
Available to Everyday Users	Select this option if EMS Web App 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.



Calculations Tab of the Group Type Dialog

Note:
If the appropriate calculation is not available, then you can configure it. See Configure Calculations.

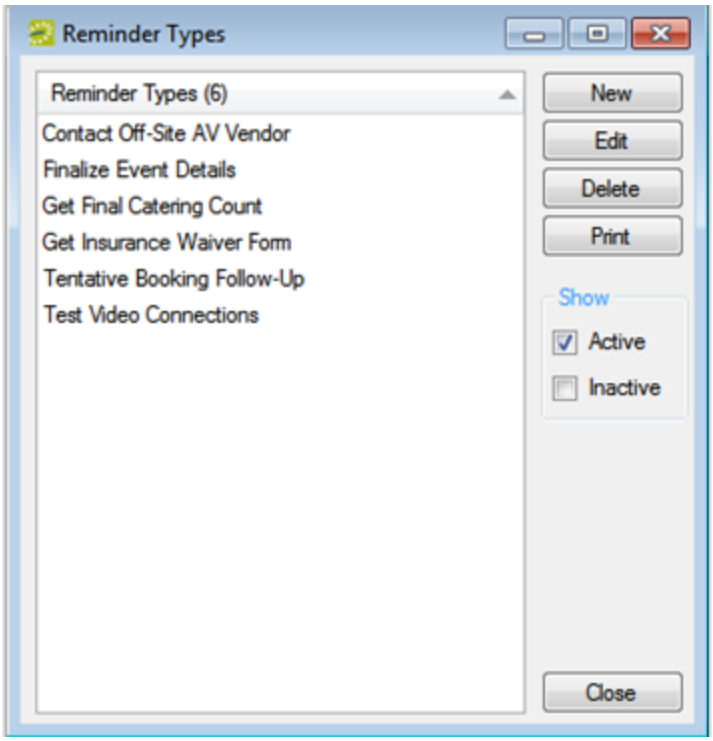
5. Click **OK**. The Group Type dialog box closes. You return to the Group Types window with the newly configured group type automatically selected.

CHAPTER 71: Configure 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 , follow these steps:

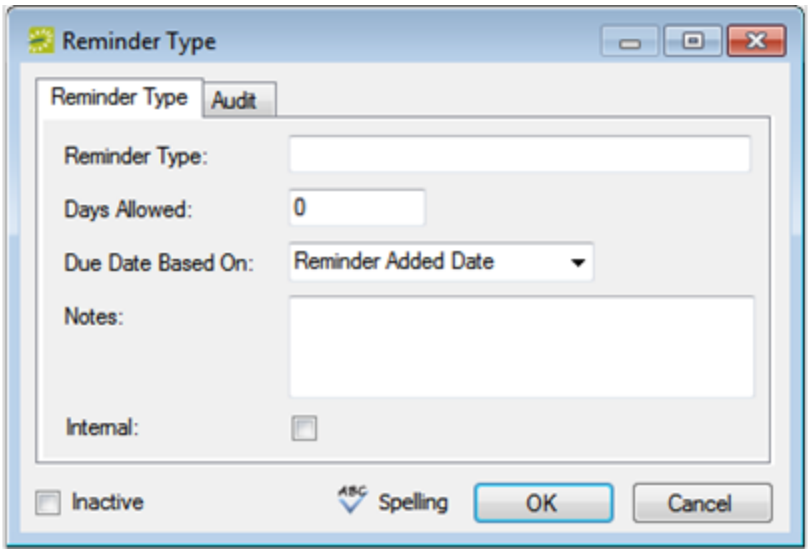
1. On the EMS menu bar, click **Configuration** > **Other** > **Reminder Types**. The Reminder Types window opens. This window lists all the reminder types that are currently configured in your EMS database and that have a status of Active.



Reminder Types Window

> **Note:**
> 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.



Reminder Type Dialog

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.

Field	Description
	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.

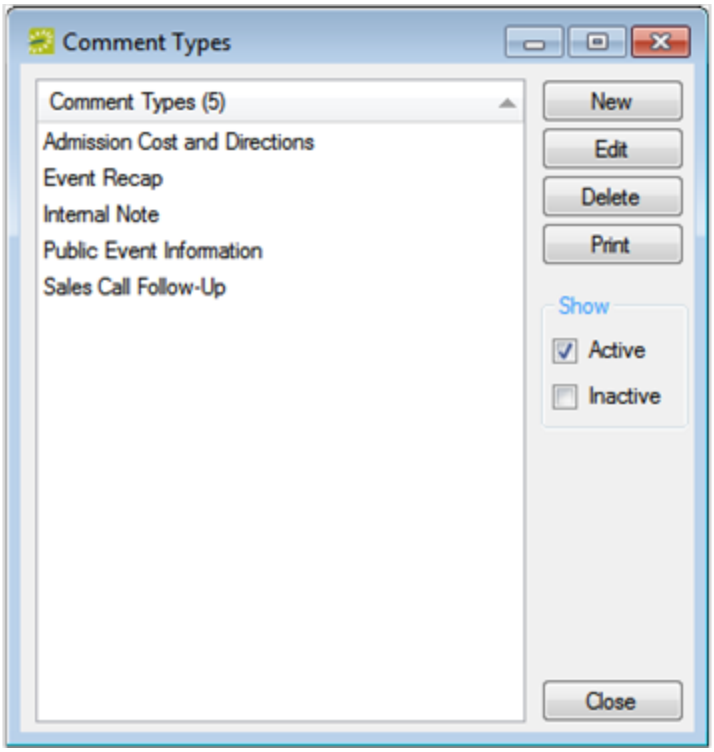
4. Click **OK**. The Reminder Type dialog box closes. You return to the Reminder Types window with the newly configured reminder type automatically selected.

CHAPTER 72: Configure 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, follow these steps:

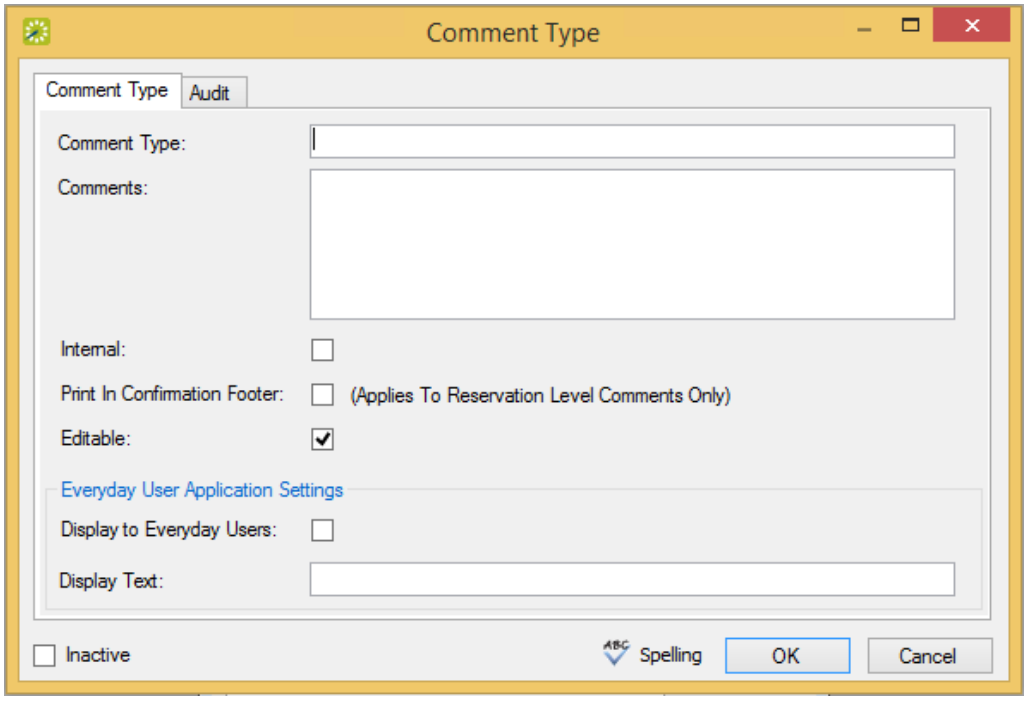
1. On the EMS menu bar, click **Configuration** > **Other** > **Comment Types**. The Comment Types window opens. This window lists all the comment types that are currently configured in your EMS database and that have a status of Active.



Comment Types Window

> **Note:**
> 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.



Comment Type Dialog

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.

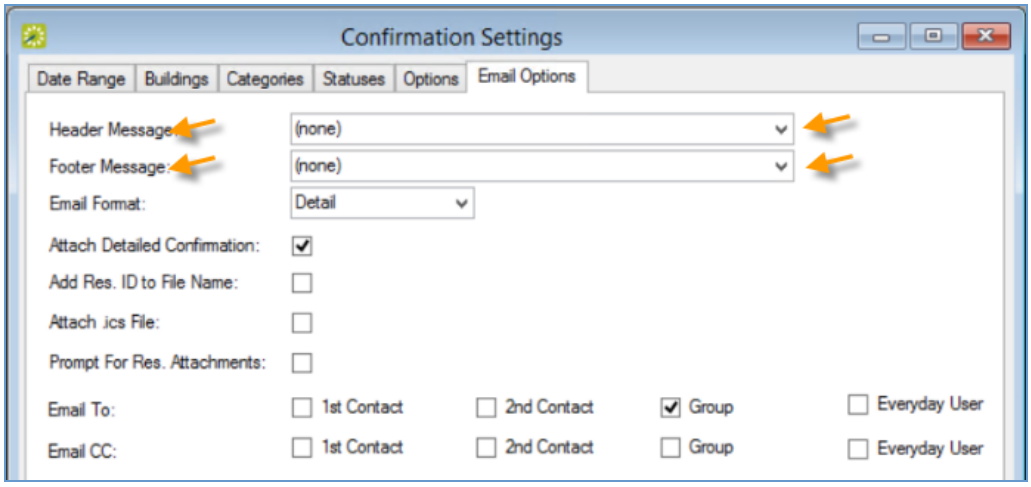
Field	Description
	Note: Used for internal reporting purposes only. The comment type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Print in Confirmation Footer	Select this option if the comment type is to be printed in the footer of reservation-level confirmations.
EMS Web App (Everyday User Application) Settings	
Display to Everyday Users	Select this option if the comment is to be displayed in EMS Web App when it is attached to a reservation or booking.
Display Text	Provides an expanded description of the comment type in EMS Web App 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.

CHAPTER 73: Configure Messages

Messages are typically added to the headers of confirmations, notifications, and invoices to further customize them.

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. You associate them with confirmations, emails, and invoices in reservation or booking under **Settings** > **Confirmation Settings** > **Email Options**.

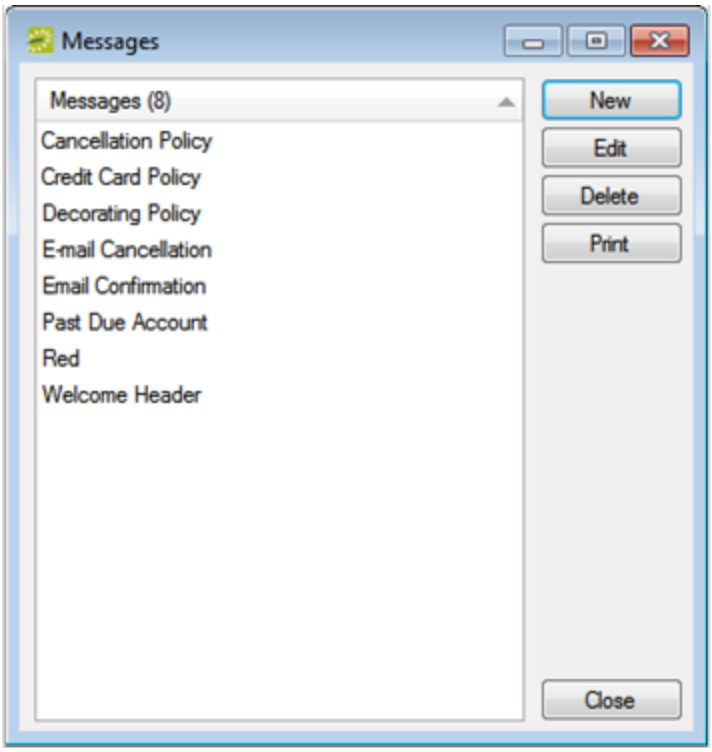


Email Options Tab of the Confirmation Settings Dialog

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.

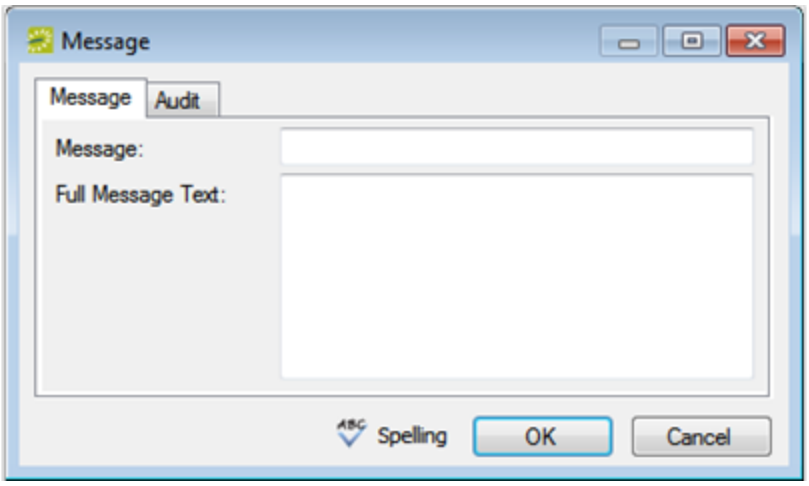
To configure messages, follow these steps:

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.



Messages Window

2. Click **New**. The Message dialog box opens. The **Message** tab is the active tab.

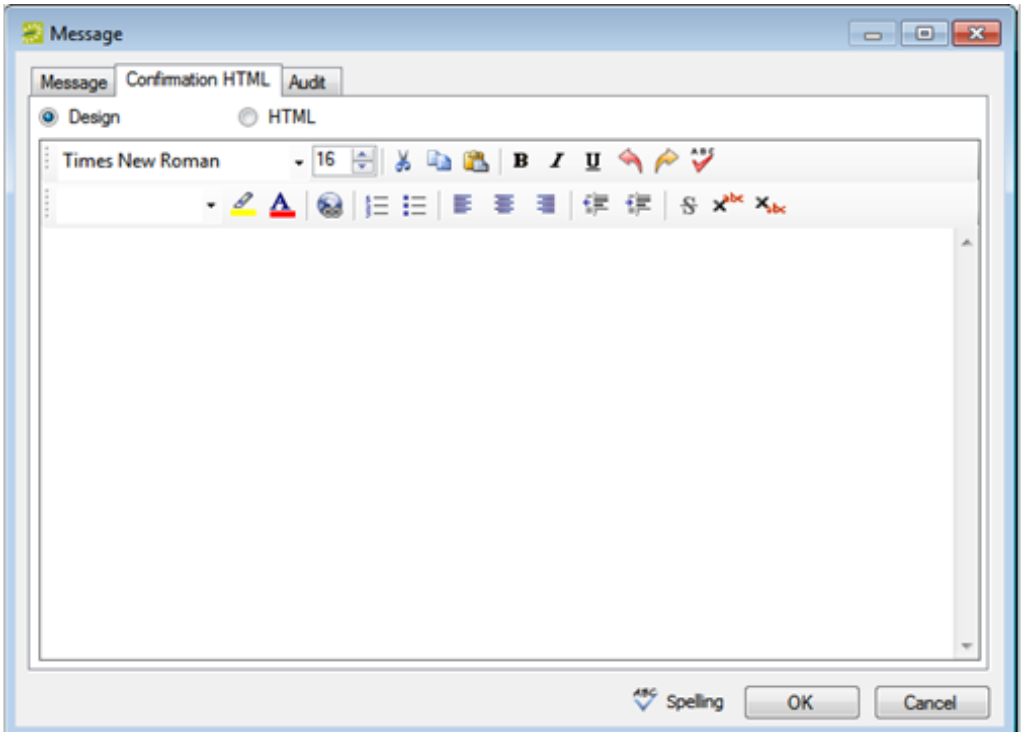


Message Tab of the Message Dialog

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.



Confirmation HTML Tab of the Message Dialog

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.

CHAPTER 74: Configure Special Dates or Holidays

Special Dates are days that have special significance for your organization, for example, New Year's Day, Spring Break, Staff Retreat, and so on. Special Dates are displayed in various places throughout your EMS system. The special date 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 special date or holiday.

This topic will provide information on the following:

- Open the Special Dates Configuration Window
- Configure a Single Special Date or Holiday
- Configure Multiple Special Dates or Holidays
- Import a List of Special Dates or Holidays
- Configure Building Hours for a Special Date or Holiday

Note:

You must configure your organization's Special Dates each calendar year. EMS Desktop Client does not assume that a day that is a special date or holiday for the current calendar year is also a special date or holiday for the next calendar year.

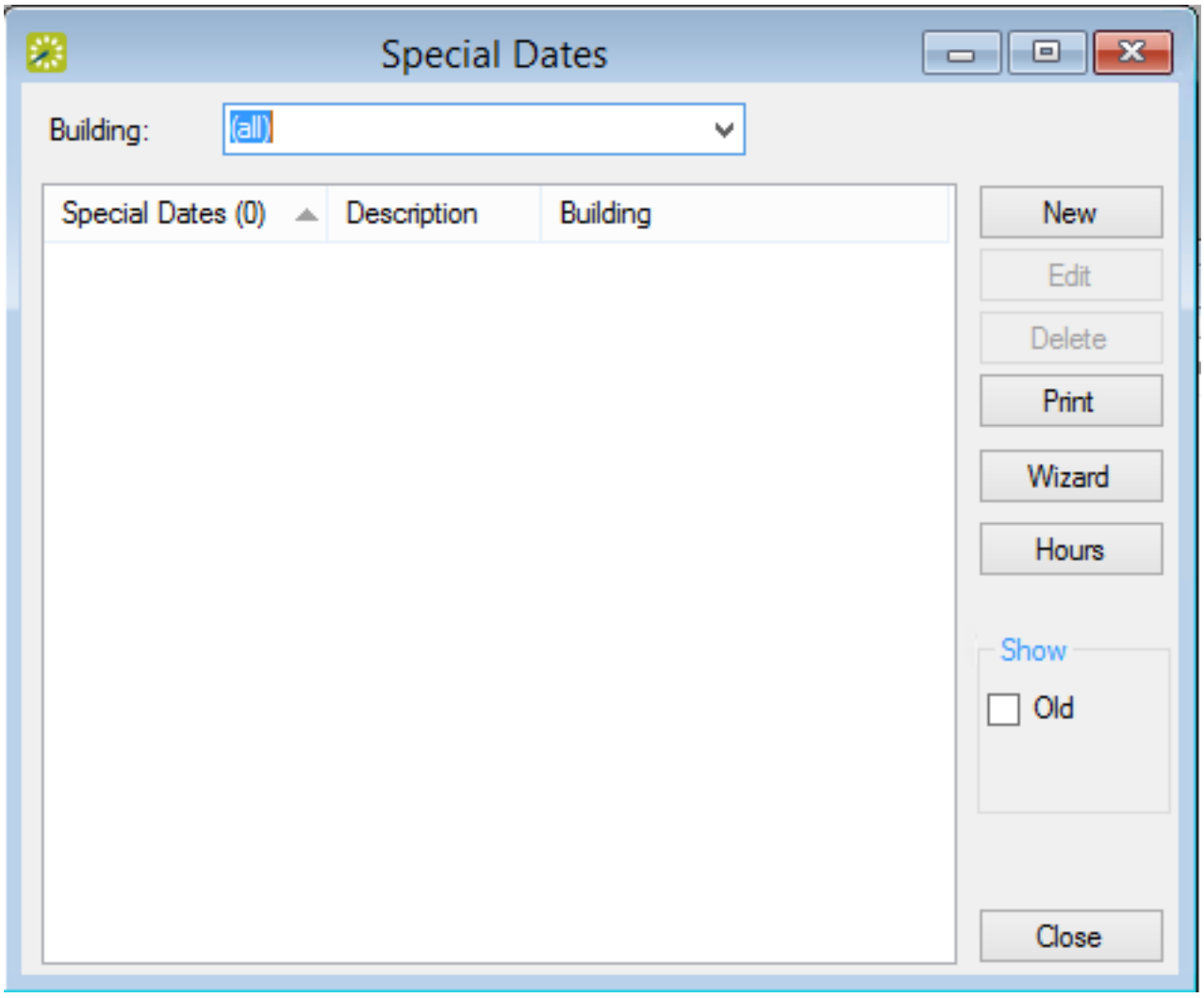
You can configure Special Dates on an individual basis; you can configure multiple Special Dates; or you can use a wizard to import a list of Special Dates in a single step. Optionally, after you configure or import a list of Special Dates, you can configure the hours for the buildings that are affected by the special date or 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 special date or holiday or the building is closed for the entire special date or holiday.

Open the Special Dates Configuration Window

To open the Special Dates configuration window to view special dates and holidays, follow these steps:

1. On the EMS menu bar, click **Configuration** > **Other** > **Special Dates**. The Special Dates window opens. This window lists all the Special Dates 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.



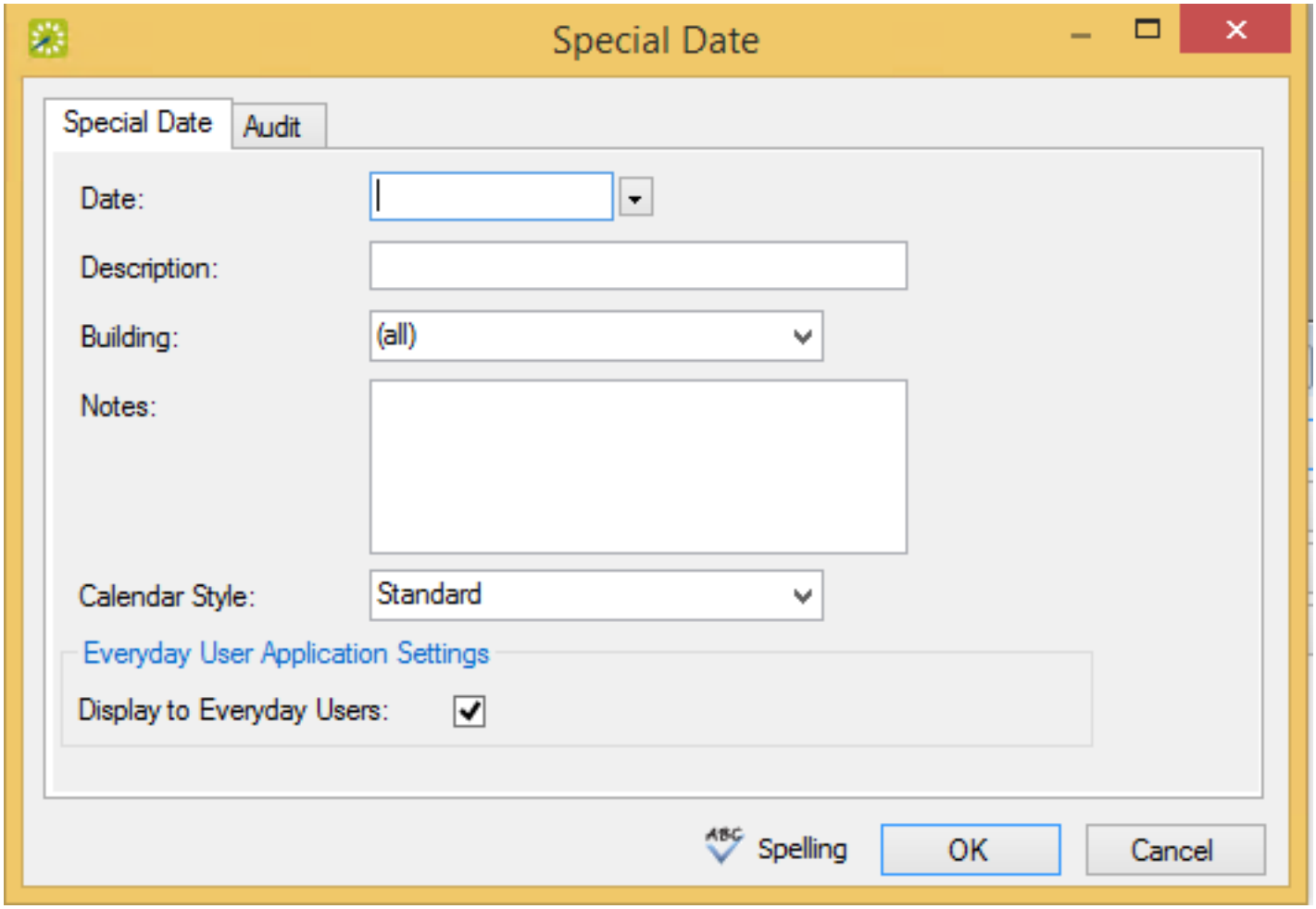
Special Dates Window

2. Optionally, do one or both of the following:
   - To view all Special Dates in your EMS database, regardless of date, under Show, click **Old**.
   - To view all Special Dates for a specific building, select the building on the Building drop-down list.

Configure a Single Special Date or Holiday

To configure a single special date or holiday, follow these steps:

1. Click **New**. The special date or holiday dialog box opens.



Special Date Dialog Box

2. Enter the information for the special date or holiday.

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

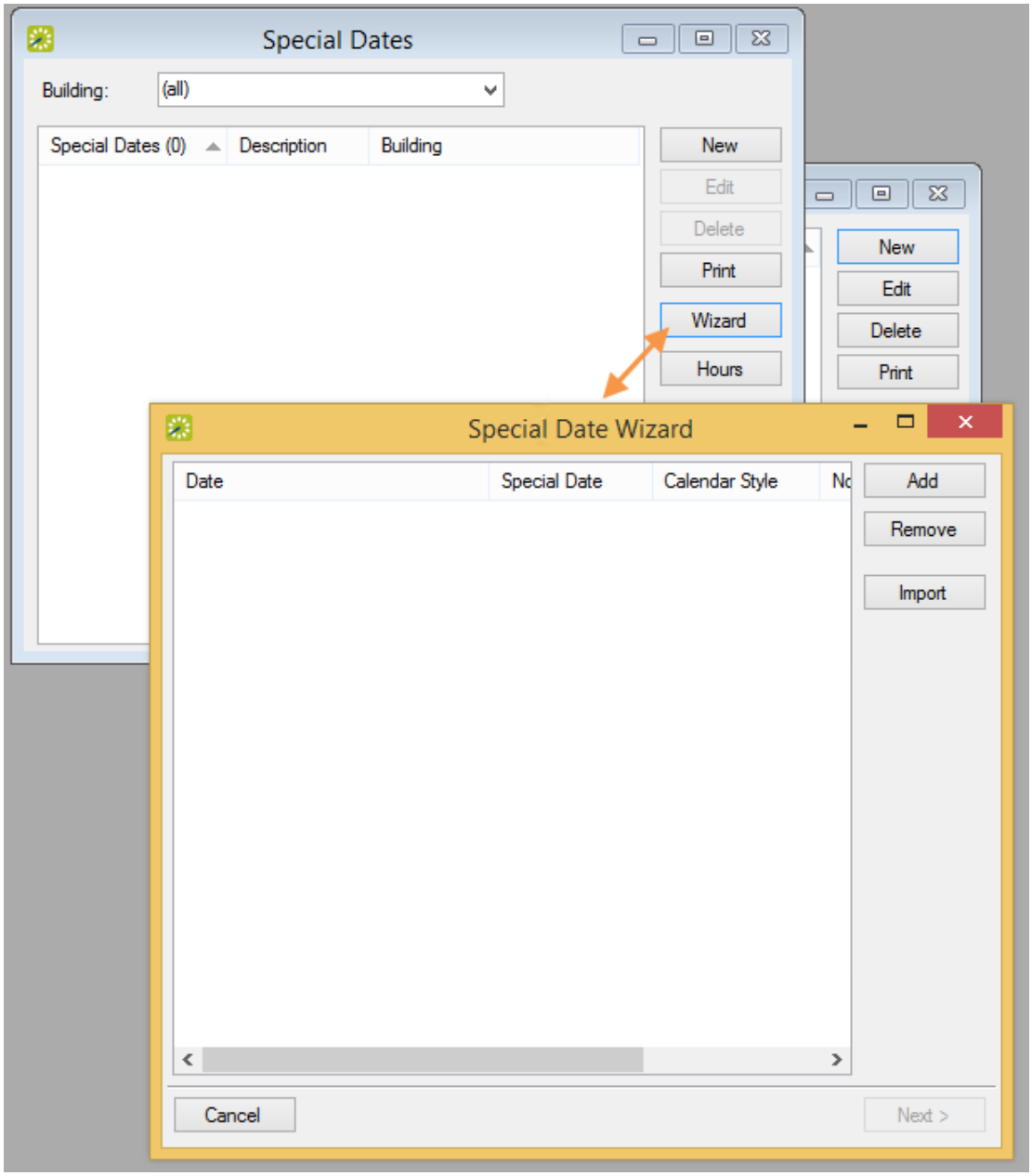
Field	Description
Notes	Any special notes or information about the special date or holiday.
Calendar Style	Select the print characteristics for the special date or holiday on the event schedule.
EMS Web App Settings	
Display to Everyday Users	Clear this option if you do not want the special date or holiday description to be displayed in EMS Web App .

3. Optionally, click **Spelling** to spell check the special date or holiday description before you save it.
4. Click **OK**. The special date or holiday dialog box closes. You return to the Special Dates window with the newly configured special date or holiday automatically selected.

Configure Multiple Special Dates or Holidays

To configure multiple special dates or holidays, follow these steps:

1. Click **Wizard**. The special date or holiday Wizard opens.



Special Date Wizard

2. Click **Add.** The Add special date or holiday dialog box opens.
3. Enter the information for the special date or holiday.

Field	Description
Date	The date for the special date or holiday.

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

4. Click **OK**. The Add special date or holiday dialog box closes. You return to the special date or holiday Wizard window with the newly added special date or holiday selected in the window.
5. Repeat Step 2 through Step 4 until you have added all the needed Special Dates.
6. Click **Next**. The special date or holiday Wizard window is updated with a list of all the buildings that are currently configured in your EMS database.
7. Select the building, or CTRL-click to select the multiple buildings for which the special date or holiday is to apply, and then click **Finish**. You return to the Special Dates window with the newly configured Special Dates displayed in the window.

Import a List of Special Dates or Holidays

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

To import a list of special dates or holidays, follow these steps:

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

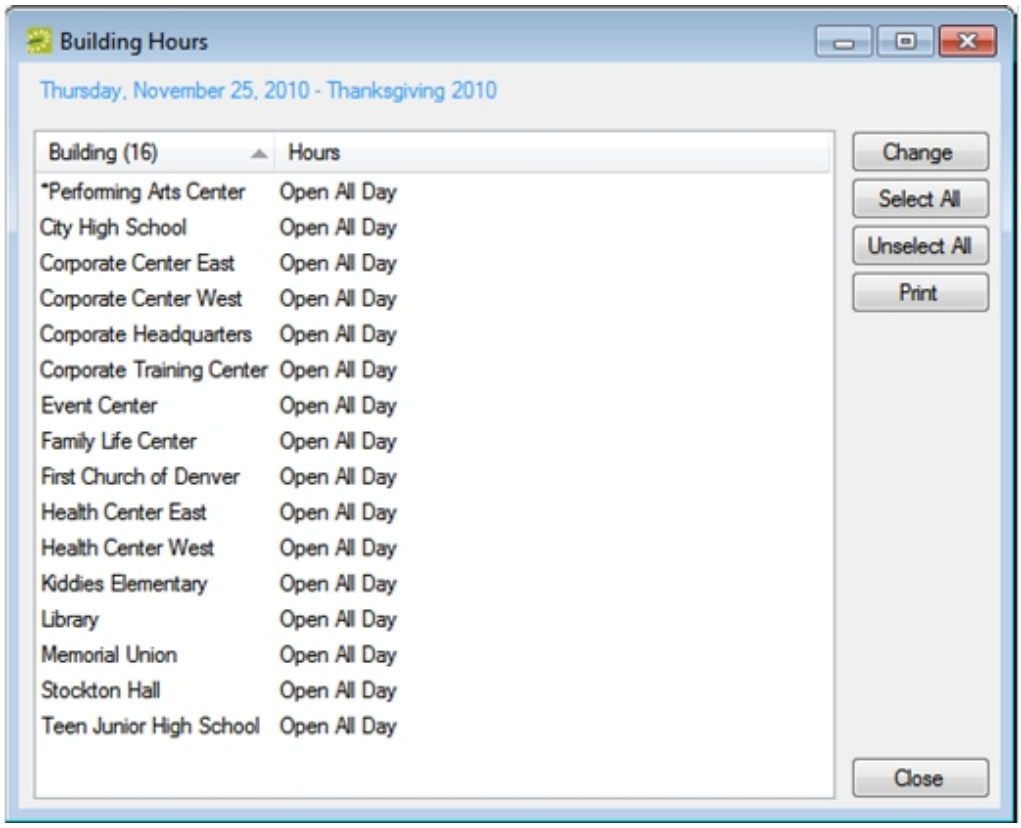
> **Note:**
> Each special date or holiday must be a separate line entry. To see the required format for the tab-delimited file, on the Special Dates window, click **Print** > **Import Format**. See Also: Special Date Import File Specifications.

2. Click **Wizard**. The special date or holiday Wizard opens.
3. Click **Import**, and in the Open File dialog box, browse to and select the tab-delimited text file that contains that Special Dates that you are importing, and then click Open. The special date or holiday Wizard window is updated with a list of all the buildings that are currently configured in your EMS database.
4. Select the building, or CTRL-click to select the multiple buildings for which the Special Dates are to apply, and then click **Finish**. You return to the Special Dates window with the newly imported Special Dates displayed in the window.
5. Optionally, select a newly imported special date or holiday, and then do one or both of the following:
   - Click **Edit** to edit the Notes, Calendar Style, and/or EMS Web App. Settings for the special date or holiday.
   - Configure the building hours for the special date or holiday.

Configure Building Hours for a Special Date or Holiday

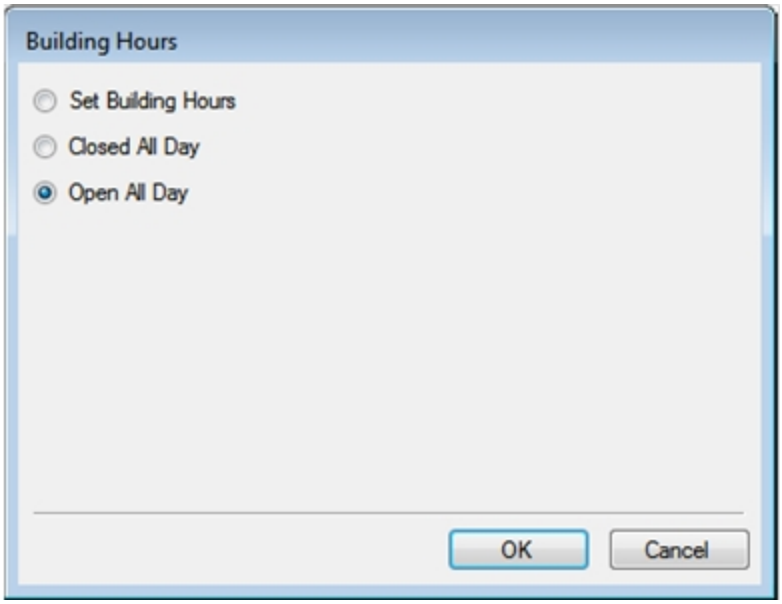
To configure building hours for a special date or holiday, follow these steps:

1. If you have not already done so, on the EMS menu bar, click **Configuration** > **Other** > **Special Date** to open the Special Dates window.
2. Select a special date or holiday, and then click **Hours**. The Building Hours window opens. The date and title of the special date or holiday are displayed at the top of the window. A list of all the buildings for which the special date or holiday applies as well as the hours of operation for each building are displayed in the window.



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.



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 special date or 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:** EMS Web App users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire special date or 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 EMS Web App) 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 EMS Web App users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire special date or 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 Special Dates window.

CHAPTER 75: Configure 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 guest 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 guest 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.

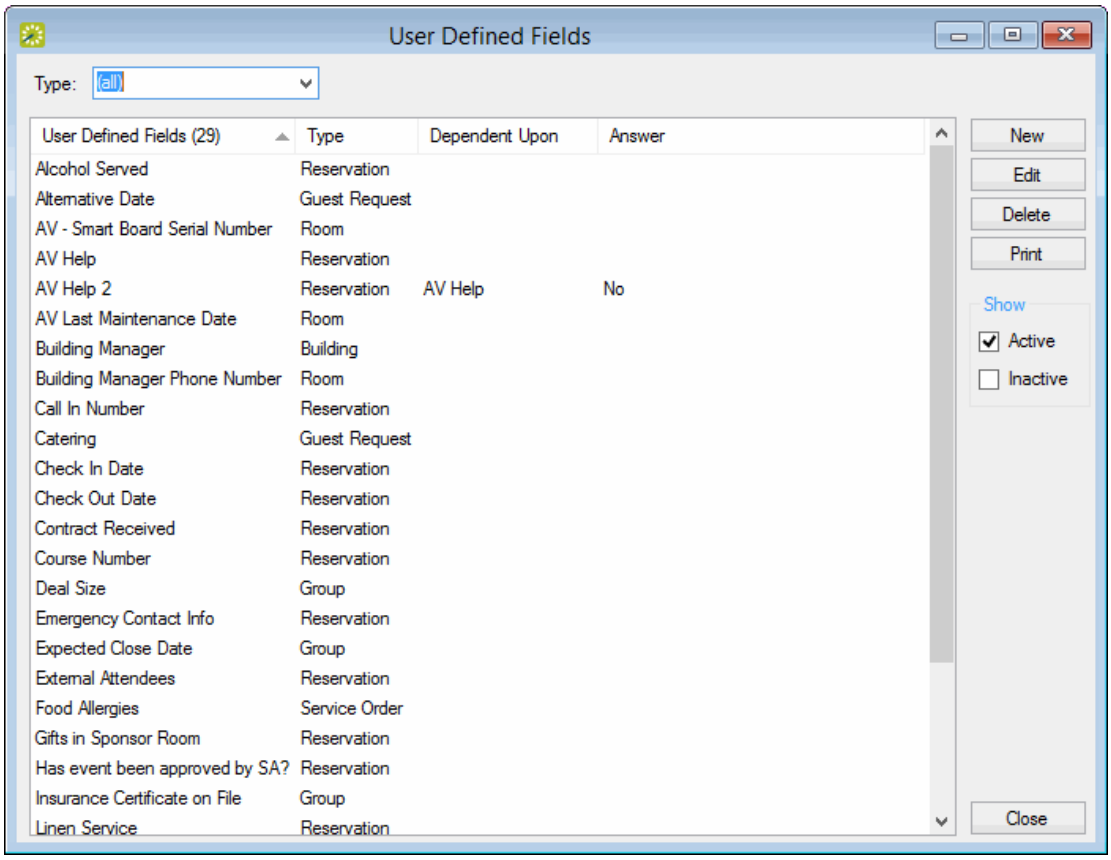
This topic provides information about the following:

- Configure User Defined Fields (UDFs)
- UDF Field Types

Configure User Defined Fields (UDFs)

To configure user defined fields, follow these steps:

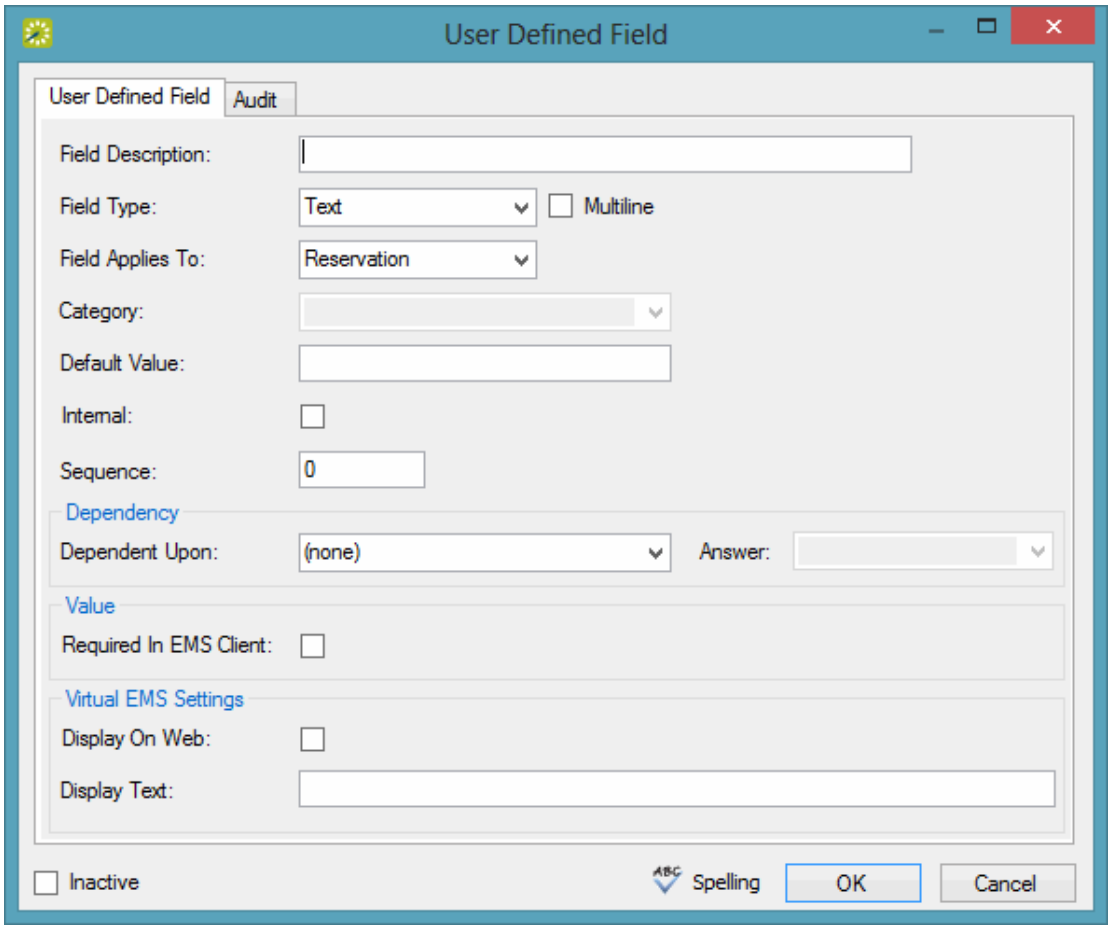
1. On the EMS menu bar, click **Configuration** > **Other** > **User Defined Fields**. The User Defined Fields dialog box opens. This window lists all the User Defined Fields of any type that are currently configured in your EMS database and that have a status of Active.



User Defined Fields Dialog Box

- 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 drop-down list, select a different type, such as Booking, Building, Group, Group/Reservation (which is a Group for which a Reservation has been made), Reservation, Room, Service Order, Guest Request, or Web User.

2. Click **New**. The User Defined Field dialog box opens.



User Defined Field Tab of the User Defined Field Dialog Box

3. Enter the information for the new User Defined Field. To see more detailed information on UDF Field Types, refer to the following table.

User Defined Field Options

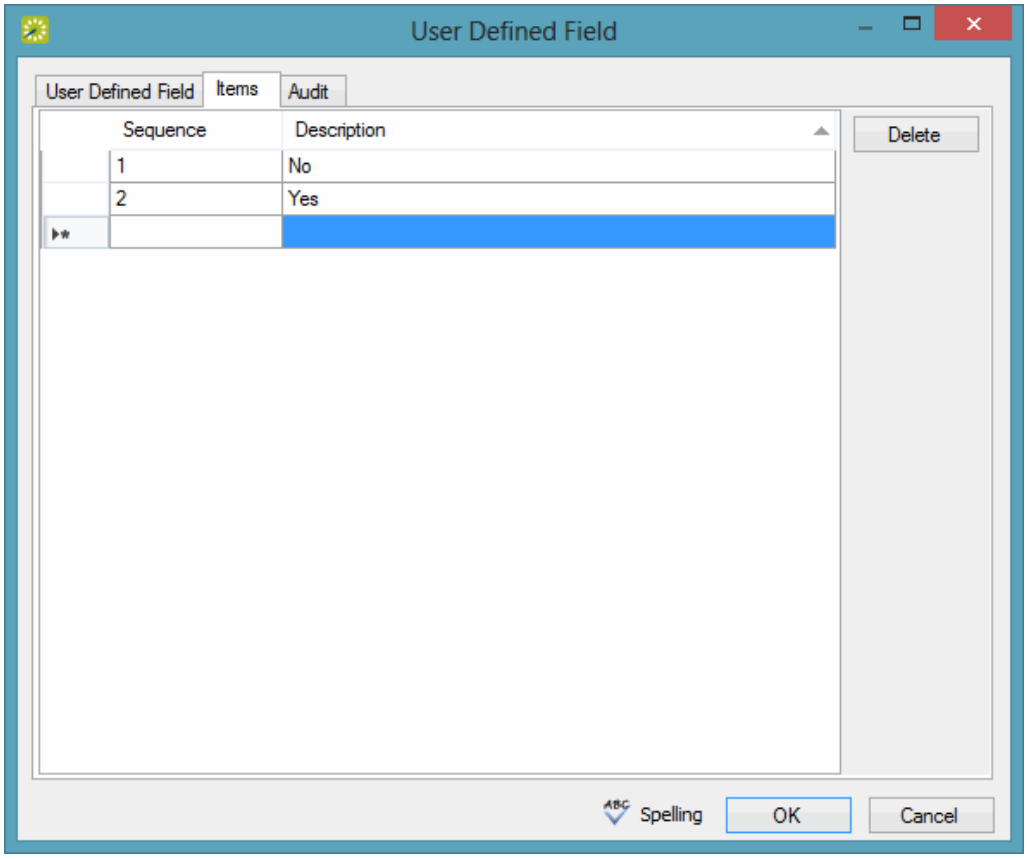
Field	Description
Field Description	A name or description for the field.
Field Type	Select the type of data that the field is to hold (Text, Date, List, or Numeric).

Field	Description
	Note: If you select Text, then an option for displaying a multi-line textbox in EMS and EMS Web App 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. If you select List, then the "Allow Multi-Select" option appears. This lets your users pick multiple items from the list whenever the User Defined Field is used.
Field Applies To	Select the item to which the field applies: • Booking—Provides the ability for a user to enter a User Defined Field when creating a booking. • Building—Provides the ability to define a custom Building property for reporting in Query Builder. • Course—EMS Campus only. • Group—Provides the ability to enter User Defined Fields inside the group screen for each Group. • Group/Reservation—The UDF that is assigned to a Group when a new Reservation is created for the Group • Guest Request—Provides the ability for users to enter a User Defined Field when making a Guest Request. • Reservation—Provides the ability for users to enter a User Defined Field when making a Reservation. • Room—Provides the ability to define a custom Room property for reporting in Query Builder. • Service Order—Provides the ability for users to enter a User Defined Field when adding a Service Order. • Web User—Provides the ability for users to enter a User Defined Field when inside an Everyday User's options.
Category	Available only if you select Service Order for Field Applies To. Select the service order category for which the field applies.

Field	Description
	Note: If the appropriate category is not available, you can configure it. See Configuring Categories.
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.
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 guest 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.
Dependency	
Dependent Upon	Select a parent UDF. Your child UDF will be dependent on that parent. The parent UDF must be configured first and be a List type.
Answer	Select the answer that will cause your child UDF to display with the parent. If the right

Field	Description
	answer is not selected the child UDF will not show.
Value	
Required in EMS Desktop Client	Select this option if a user must enter a value in the field when making a Reservation in the EMS Desktop Client.
EMS Web App Settings	
Display to Everyday Users	Select this option if you want the User Defined Field to be displayed when users are making a Reservation in EMS Web App.
Display Text	Enter the text that is to be displayed for the field in EMS Web App.
Inactive	Leave this option blank to add the User Defined Field an active field. Select this option to de-activate the field.

4. If you selected any field type other than List, go Step 5; 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.



Items Tab of the User Defined Field Dialog Box

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

5. Optionally, click **Spelling** to spell check the User Defined Field before you save it.
6. Click **OK**. The User Defined Field dialog box will close and you will be returned to the User Defined Fields window.

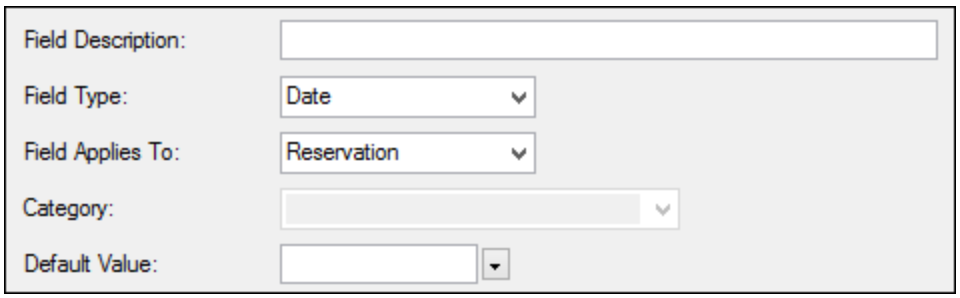
UDF Field Types

You can select from the following types of UDF fields in the Field Type drop-down list of the User Defined Field Tab:

- Date UDF
- List UDF
- Numeric UDF
- Text UDF

Date UDF

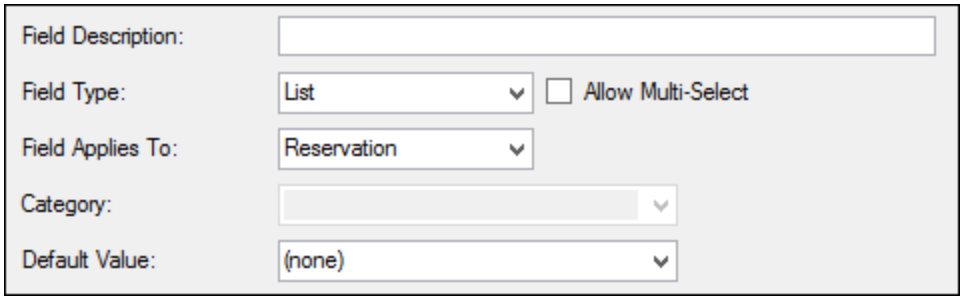
The Date user defined field type allows the user to enter a value into a date field



Date UDF Field Type

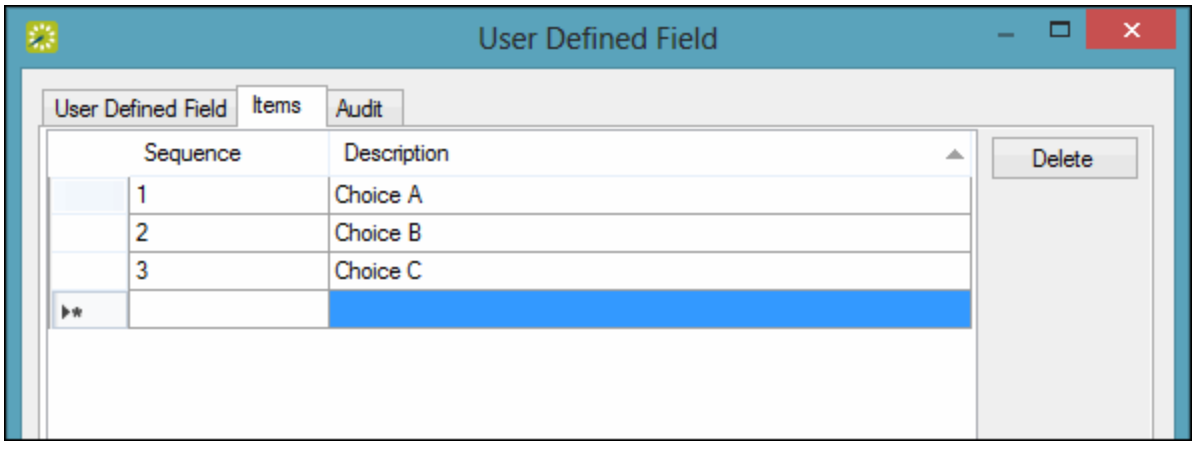
List UDF

The List user defined field type allows the user to select an item or items from a list that you populate. The **Allow Multi-Select** option lets the user pick more than one item from the list.



List UDF Field Type

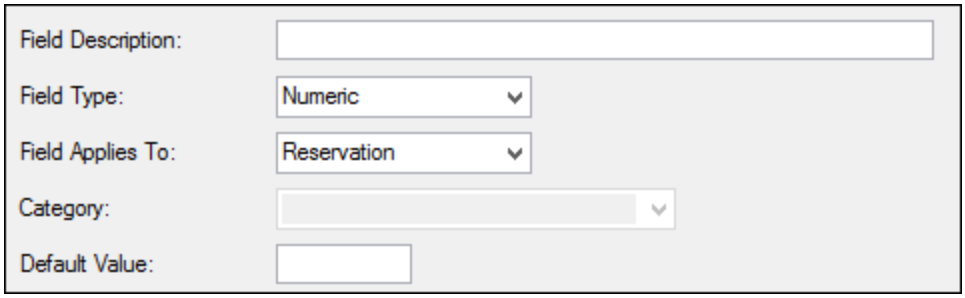
You can configure the items for a list on the **Items** tab. The User Defined Field Dialog box displays the **Items** tab when you select **List** as the field type.



Items Tab of the User Defined Field Dialog Box

Numeric UDF

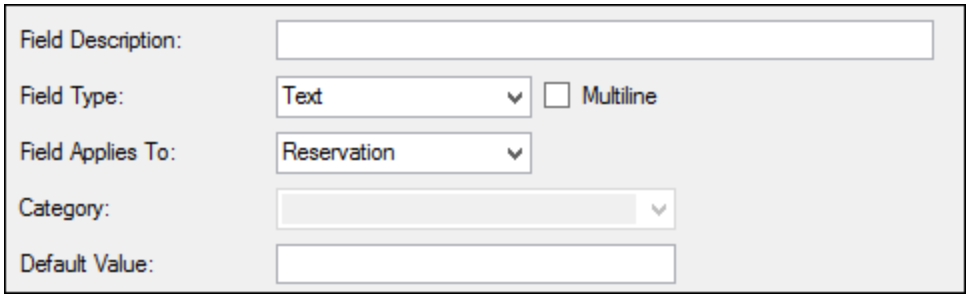
The Numeric user defined field type allows the user to enter ONLY a number into a text field.



Numeric UDF Field Type

Text UDF

The Text user defined field type allows the user to enter any text into a text field.



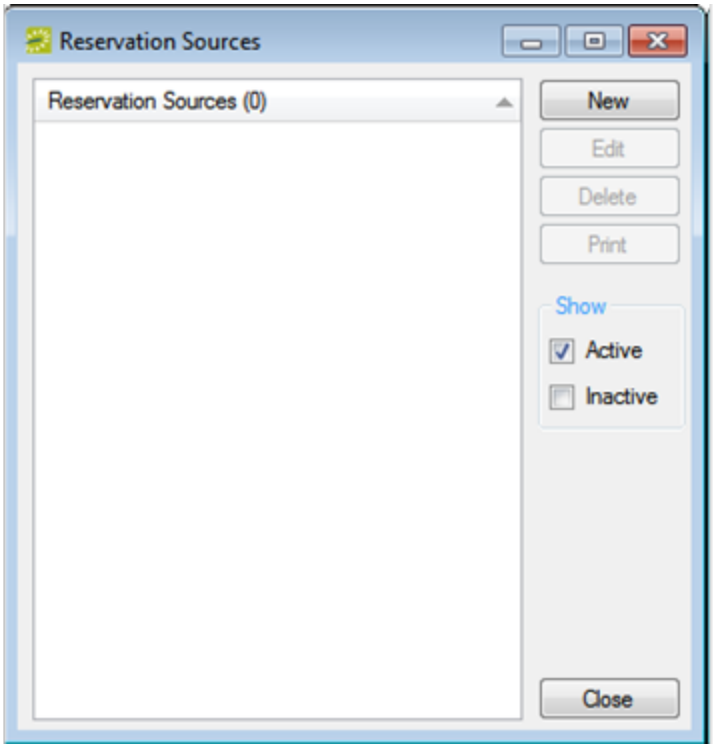
Text UDF Field Type

CHAPTER 76: Configure Reservation Sources

A reservation source indicates the origination of a reservation request, for example, walk-up, email, EMS Web App, 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, follow these steps:

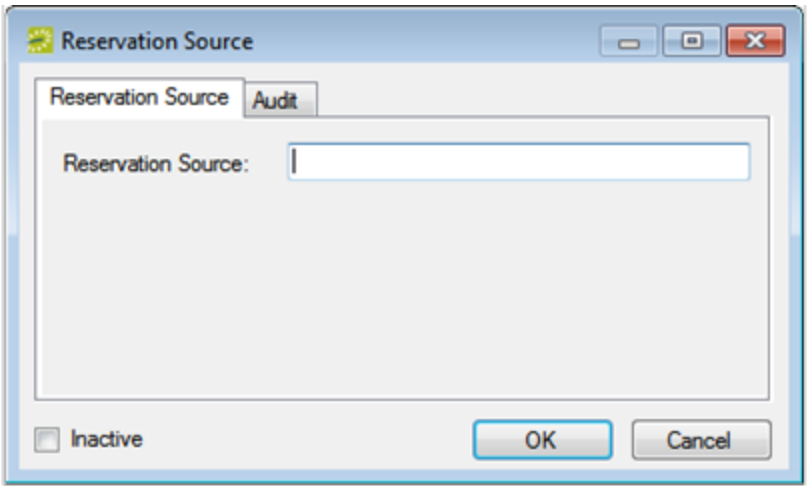
1. On the EMS menu bar, click **Configuration** > **Other** > **Reservation Sources**. The Reservation Sources window opens. This window lists all the reservations sources that are currently configured in your EMS database and that have a status of **Active**.



Reservation Sources Window

> **Note:**
> 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.



Reservation Source Dialog Box

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

> **Note:**
> The reservation source can be a maximum of 50 characters, including spaces.

4. Leave the **Inactive** check box unchecked to add the reservation source as an active source. Optionally, select **Inactive** to inactivate the source.

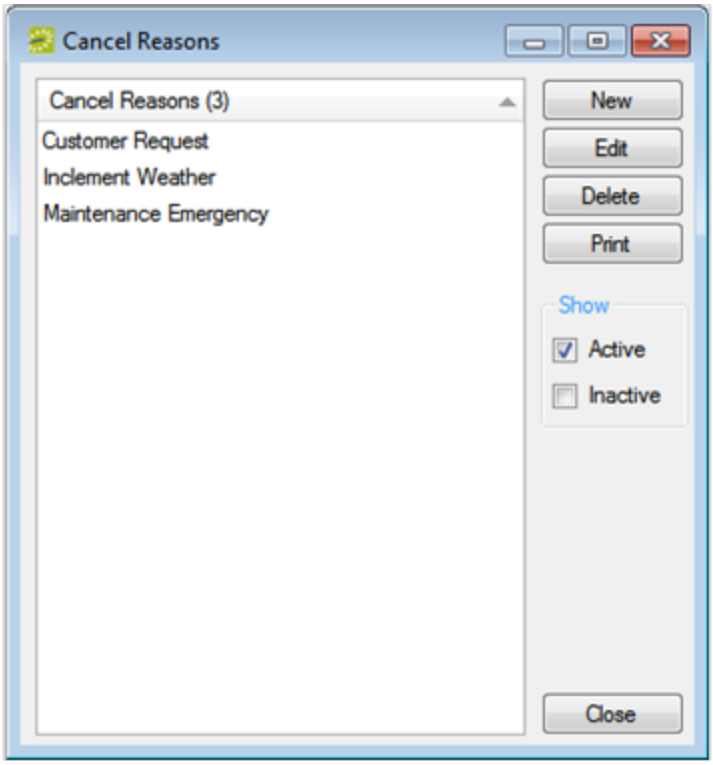
5. Click **OK**. The Reservation Source dialog box closes. You return to the Reservation Source window with the newly configured source automatically selected.

CHAPTER 77: Configure 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 a single word or phrase (such as Event Postponed, Other, and Will Reschedule), or you can configure a cancel reason so that the user who is canceling the reservation must enter additional information about the cancellation.

To configure cancel reasons, follow these steps:

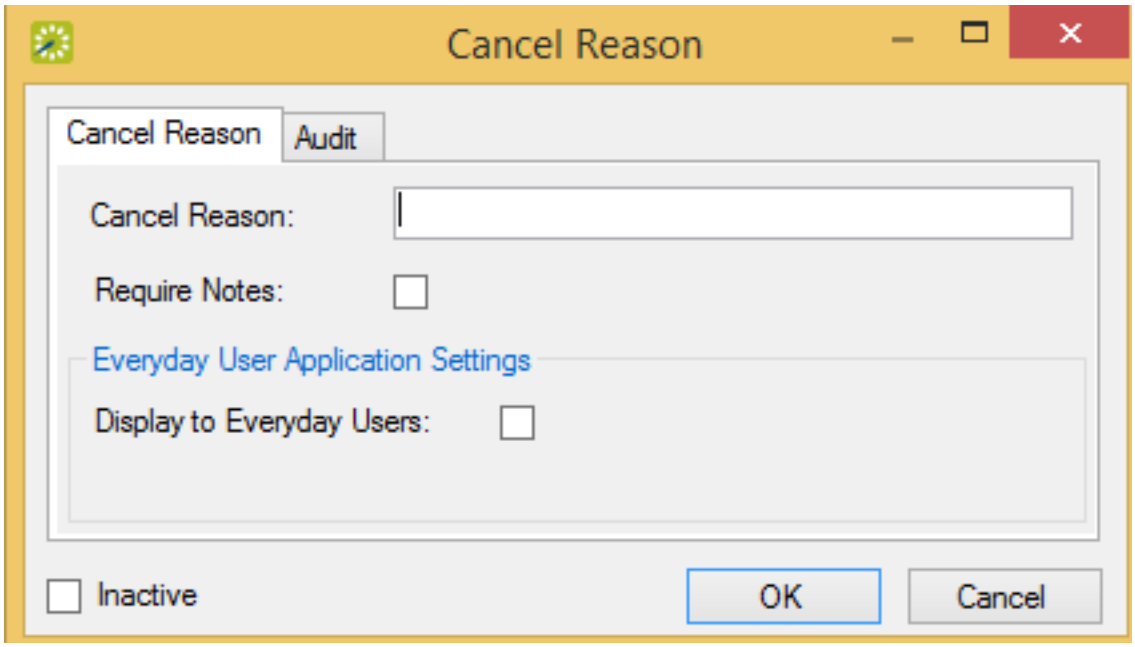
1. On the EMS menu bar, click **Configuration** > **Other** > **Cancel Reasons**. The Cancel Reasons window opens. This window lists all the cancel reasons that are currently configured in your EMS database and that have a status of **Active**.



Cancel Reasons Window

> **Note:**
> 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.



Cancel Reason Dialog Box

3. In the **Cancel Reason** field, enter a name or description for the new cancel reason (maximum 50 characters, including spaces), for example, Customer Postponed.
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 EMS Web App, then select **Display to Everyday Users**.
   - 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.

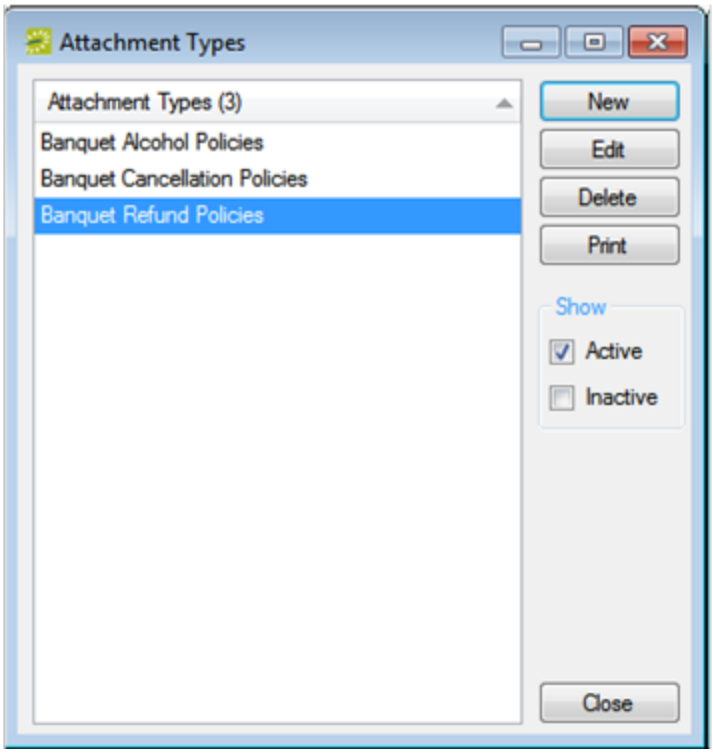
CHAPTER 78: Configure Attachment Types

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. For information about adding an attachment to a group, see the EMS Desktop Client User Guide.

To configure an attachment type, follow these steps:

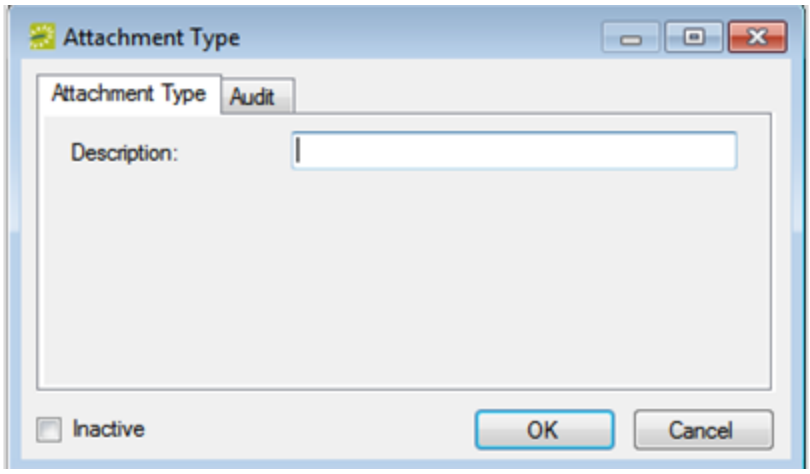
1. On the EMS menu bar, click **Configuration** > **Other** > **Attachment Type**. The Attachment Types window opens. This window lists all the attachment types that are currently configured in your EMS database and that have a status of **Active**.



Attachment Types Window

> **Note:**
> 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.



Attachment Type Dialog Box

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

> **Note:**
> 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.

CHAPTER 79: Configure 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.

This topic provides the following information:

- Create and Tag a Word Document
- Add the Tagged Word Document to Your EMS Database

Create and Tag a Word Document

To create and tag a Word document, follow these steps:

1. Create the necessary document in Microsoft Word.
2. Tag the text that is to be replaced with EMS field values. 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>>.



Note:

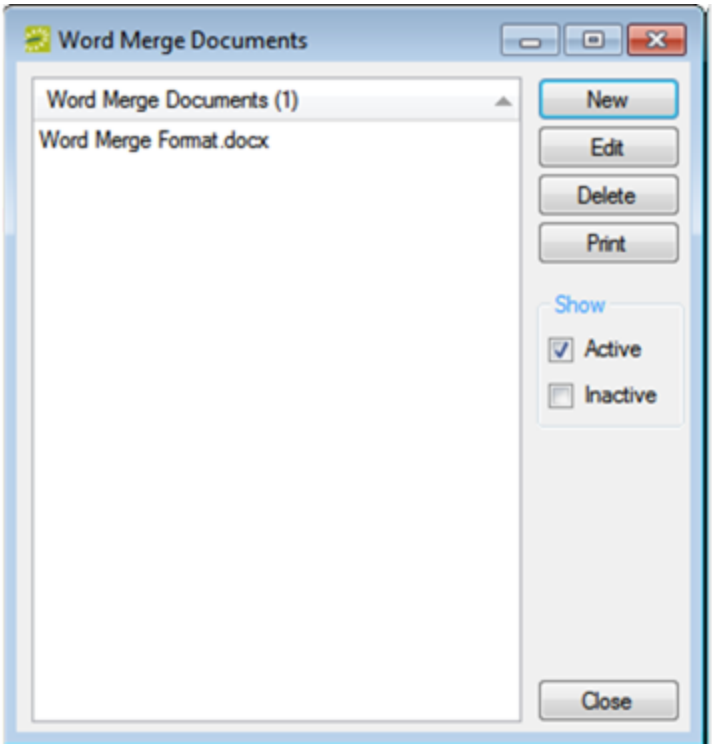
To view a complete list of the text that can be replaced in the Word document with EMS field values and the correct tags for this text, on the EMS menu bar, click **Configuration** > **Other** > **Word Merge Documents**. Then, from the Word Merge Documents window that opens, click **Print** > **Word 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.

Add the Tagged Word Document to Your EMS Database

To add the tagged Word document to your EMS database, follow these steps:

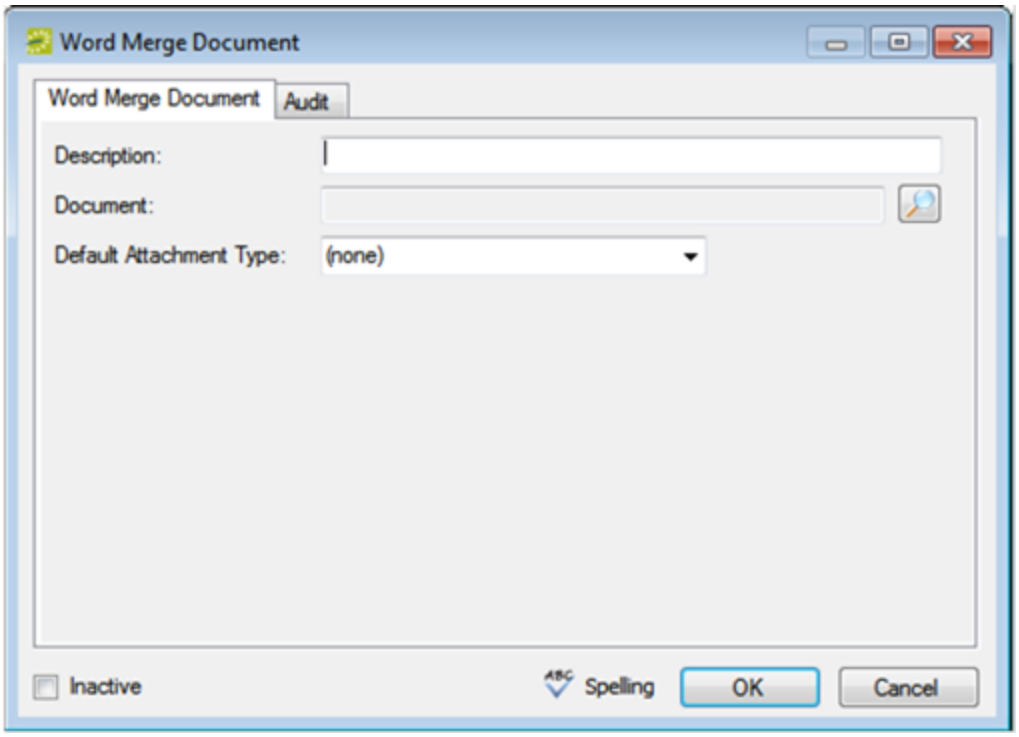
1. On the EMS menu bar, click **Configuration** > **Other** > **Word Merge Documents**. The Word Merge Documents window opens. This window lists all the Word Merge documents that are currently configured in your EMS database and that have a status of Active



Word Merge Documents Window

> **Note:**
> Optionally, to view all Word Merge documents in your EMS database regardless of status, under Show, click **Inactive**. The Word Merge Document dialog box opens.

2. Click **New**.



Word Merge Document Dialog Box

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

> **Note:**
> 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** 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.

     > **Note:**
     > If the appropriate attachment type is not available, you can configure it. See Configure Attachment Types.

   - 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; you must select **Inactive** to inactivate the document.

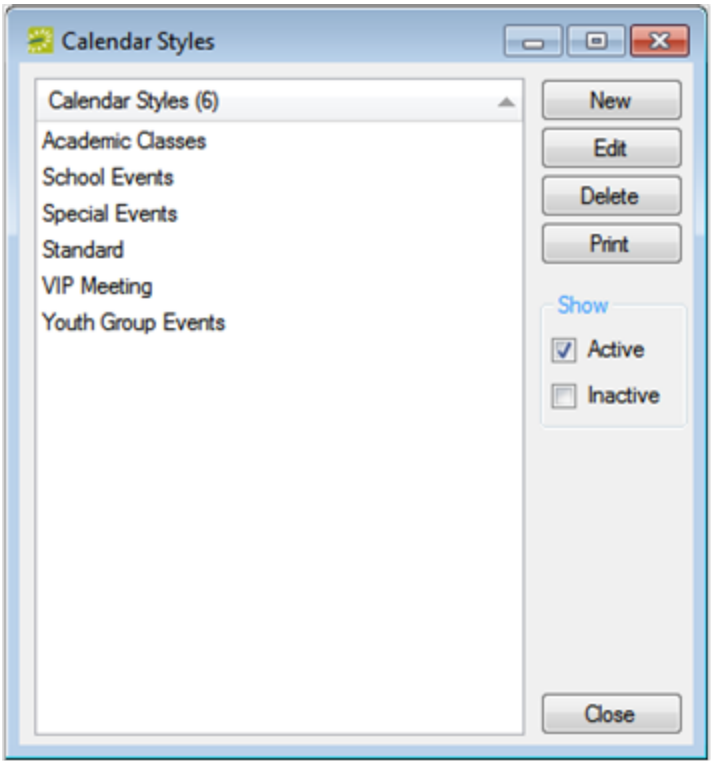
6. Click **OK**. The Word Merge Document dialog box closes. You return to the Word Merge Documents window with the newly configured document automatically selected.

CHAPTER 80: Configure Calendar Styles

Calendar styles 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 Desktop Client User Guide.

To configure calendar styles, follow these steps:

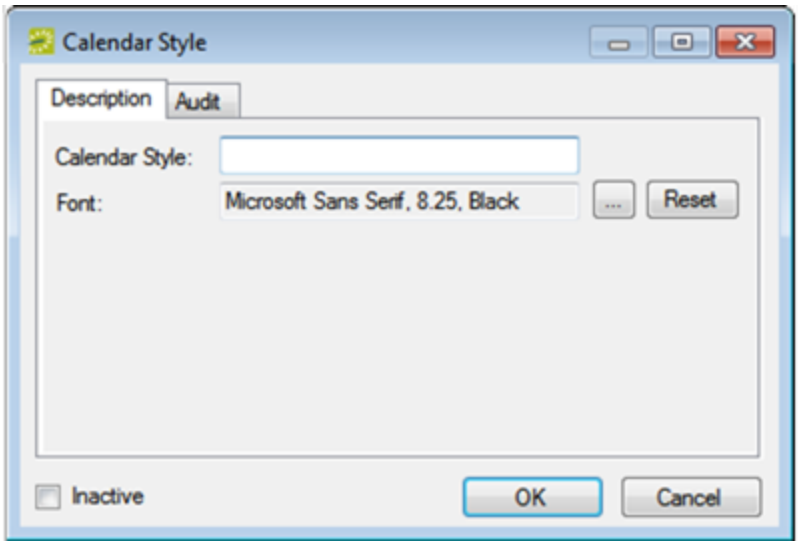
1. On the EMS menu bar, click **Configuration** > **Other** > **Calendar Styles**. The Calendar Styles window opens. This window lists all the calendar styles that are currently configured in your EMS database and that have a status of **Active**.



Calendar Styles Window

> **Note:**
> Optionally, to view all calendar styles in your EMS database regardless of status, under Show, select **Inactive**.

2. Click **New**. The Calendar Style dialog box opens.



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.

> **Note:**
> The calendar style can be a maximum of 50 characters, including spaces.

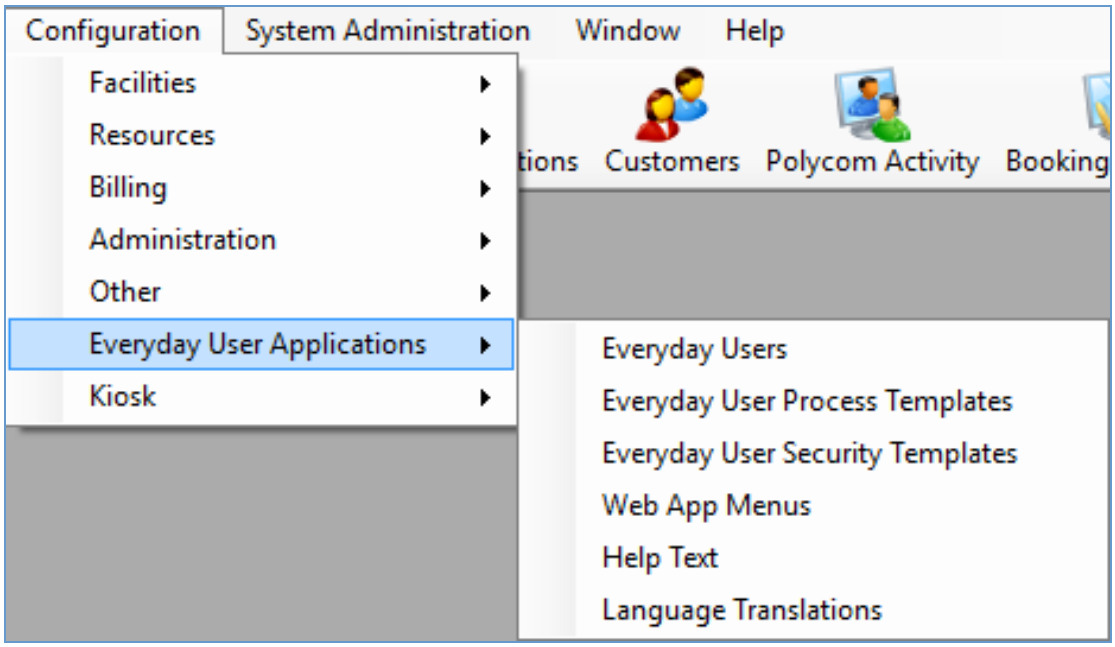
   - In the Font field, the default calendar style is listed. You can leave this value as is, or you can click the **Browse** button to open the Font dialog box and specify the font, font size, and font color for the new calendar style.

> **Note:**
> 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.

CHAPTER 81: Configuration > Everyday User Applications

This section guides you in configuring elements for EMS "Everyday User" applications, under **Configuration** > **Everyday User Applications**.



Note:
Everyday User Applications = EMS Web App, EMS Mobile App, EMS for Outlook, EMS Kiosk, EMS Glance

Settings in this area of EMS Desktop Client control features and behavior for these applications:

- Everyday Users *(user profiles)*
- Everyday User Process Templates *(process templates for everyday users)*
- Everyday User Security Templates *(security templates for everyday users)*
- Web App Menus *(menu settings for the EMS Web App)*
- Help Text *(help text settings for Everyday User Applications)*
- Language Translations *(language translation settings for Everyday User Applications)*

EMS Web App 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 users, security templates, process templates, menus and links, and help text.

Display to Everyday User Settings (DEDU)

The Display to Everyday User (DEDU) settings control whether booking details appear in the Browse Events section of the EMS Web App. For a booking to appear on Browse Events, the Event Type, Status, and Room for that book must have DEDU enabled. See Also Configure Rooms, Configure Event Types, and Configure Statuses.

Note:
If one of these properties (Event Types, Rooms, Statuses) does not have DEDU enabled, then the booking will not appear on Browse Events.

CHAPTER 82: Configure Everyday Users

An Everyday User is someone who can request or reserve space and services in any EMS Software application other than EMS Desktop Client. You assign these users to templates.

This section guides you in configuring one Everyday User at a time. Once you have configured these users, you might need to assign them to security templates and one or more process templates.

- To assign users to Everyday User process templates, see Assigning Templates to an Everyday User.
- To assign multiple templates to multiple users in a single step, see Assigning Templates to Multiple Users.

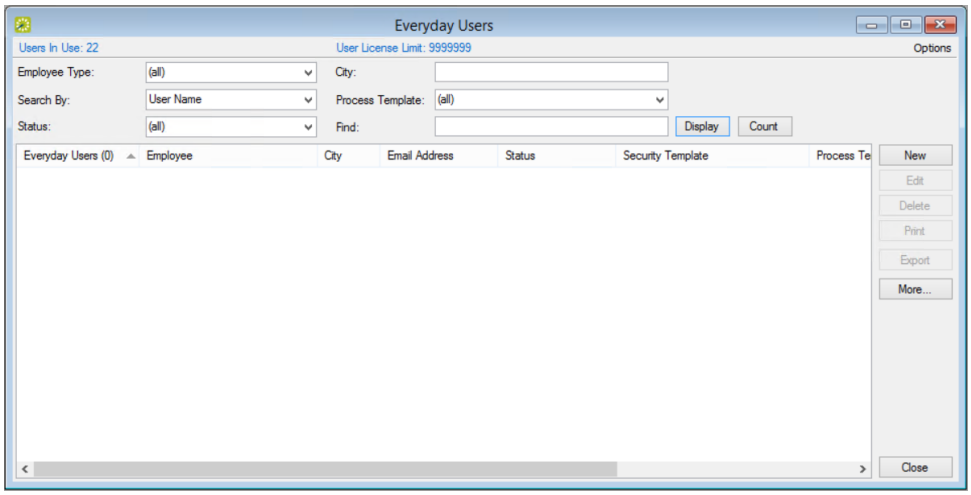
> **Note:**
> EMS classifies users into two categories: **Guests/Visitors** and **Everyday Users**.

> **Note:**
> You configure EMS Desktop Client user accounts in a different area (under the **System Administration** > **Security** menu). For instructions, See Also: Configuring EMS Desktop Client User Accounts.

Additionally, if your organization uses EMS Human Resources Toolkit to manage Everyday User accounts, See Also: Using EMS HR Toolkit. Also, a set of Account Management parameters control account management behavior. To see these parameters, refer to EMS Web App System Parameters.

To configure Everyday Users, follow these steps:

1. On the EMS Desktop Client menu bar, navigate to **Configuration** > **Everyday User Applications** > **Everyday Users**. The Everyday Users window opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.



2. Check that the user you want to configure does not already exist. Enter the user name or email address in the Find field.

> **Note:**
> This search string is not case-sensitive, but your entries must be in the correct order. For example, if searching by Email Address, a search string of bob returns bobworth@emssoftware.com but not dbobbett@emssoftware.com.

You can narrow your search results by:

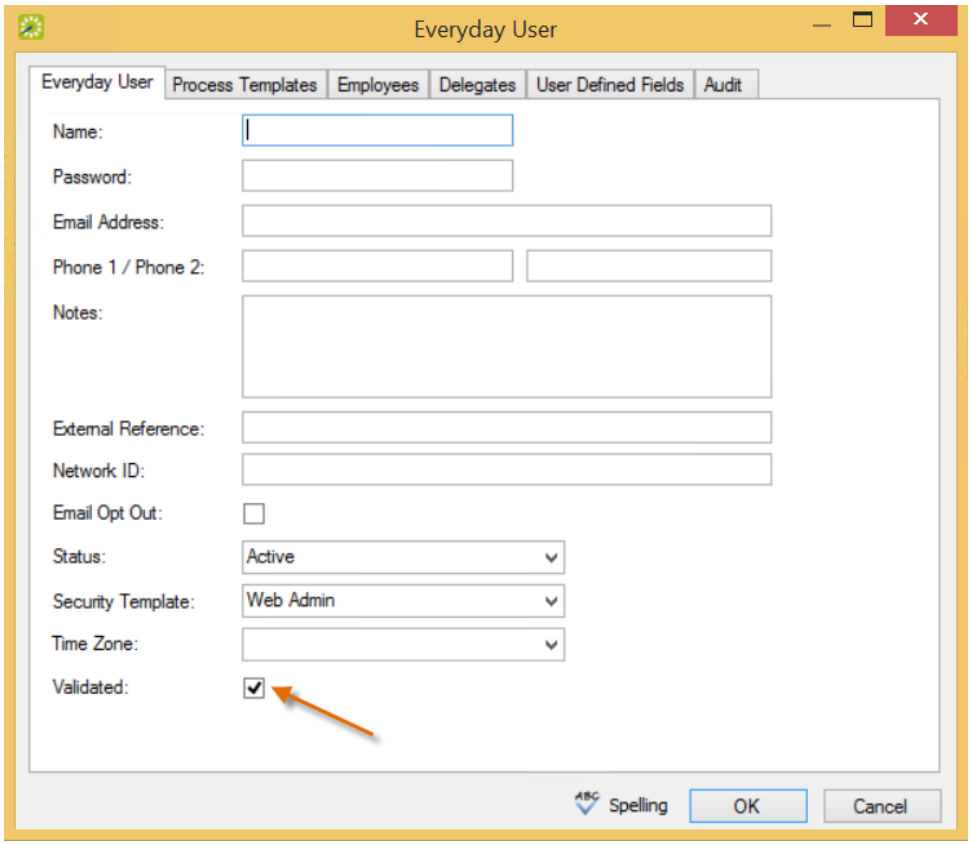
- Group Type
- City
- Status
- Process Template

3. Then click Display; search results show in the lower pane of the window. If your user does not already exist in EMS, proceed to the next step.

> **Note:**
> If the EMS system parameter "Users linked to Groups via External Reference" is set to Yes, then you will also see a Group column and a City column.

4. Create a new user. Click the **New** button. A dialog box opens.

> **Note:**
> If the user has confirmed membership (by responding to an email containing an activation link), the Validated checkbox highlighted below will be selected.
> If the user had to answer questions when requesting an account, you can view the user's responses on the **User Defined Fields** tab.



> **Note:**
> When you configure a user, you can also specify one or more delegates for the user. A delegate is a user who can create and view reservations on behalf of another user.

5. Enter information for the new user. User name and email address are required; password is only required if not using the optional Integrated Authentication module. All other information is optional and can be added later as needed.

Field	Description
Name	The name of the user. (Maximum of 30 characters, including spaces).
Password	The password that the user must enter to log in to EMS Web App. If using the optional Integrated Authentication module, Password can be left blank since the network password is used instead.
Email Address	Enter the full email address for the user as the user must enter this address to log in to EMS Web App.
Phone 1 /Phone 2	Optional fields.
Notes	Optional field. Read-only.
External Reference	Optional field. Links the user to an outside program such as EMS Human Resources Toolkit if needed.
Network ID	The user's network ID.
Email Opt Out	Optional field. Select this option if you do not want the user to receive automatic emails (such as reservation summary emails) from EMS Web App. The user can still receive manually sent emails.
Status	Required field. Select the status for the user: • Active—The user can log in to EMS Web App, EMS Mobile App, and EMS for Outlook. • Pending—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is informed that he/she must check back at a later time. • Inactive—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is instructed to contact the EMS administrator.
Security Template	Required field. This determines the user's access to the system (i.e., the menu items the user can see and the event information that the user can view).
Time Zone	Optional field. The time zone in which the user is located. Beginning in version 44.1, it is strongly recommended that users are assigned to a time zone for an optimal experience on all Everyday User Applications.

Field	Description
Validated	When checked, users who created their own accounts have confirmed membership (by responding to an email containing an activation link). When unchecked, the user will not be able to use EMS Web App.

6. Assign process templates to the new user. Open the **Process Templates** tab. The process templates you assign here will appear as menu items to the user in EMS Web App, EMS Mobile App, and EMS for Outlook.

7. Specify Groups on whose behalf the user can create and manage reservations. Open the **Groups** tab. To filter the list of active groups displayed, use the Find and Type fields and then click Display. Select one or more Groups (use CTRL-click for multiple groups), and then click Move (>) to move the selected groups to the Selected list.

8. Specify Delegates the user can impersonate. Open the **Delegates** tab; to see all available users, simply click Display. To narrow the search results, use the Search by drop-down list to search by User Name or Email Address. Select one or more delegates (using CTRL-click for multiple delegates), and then click Move (>) to move the selected users to the Selected list.

> **Note:**
> Click **Spelling** to spell-check any information that you manually entered for the user.

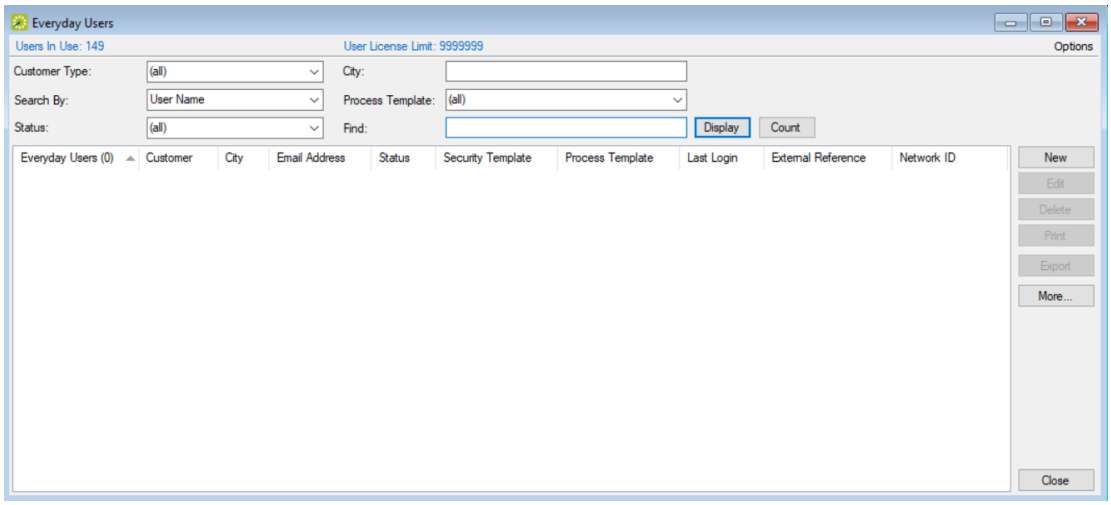
9. Click **OK**. The dialog box closes and returns you to the users window with the newly configured user automatically selected.

CHAPTER 83: Licensing for Everyday Users

If your organization has reached your limit of licensed everyday users, you will no longer be able to create additional users. To get back under your maximum number of users, you can either deactivate or delete users from the EMS Desktop Client.

To delete and/or deactivate everyday users and free up licenses, complete these steps:

1. Select the **Configuration** > **Everyday User Applications** > **Everyday Users**.
2. To delete users, select them and click the **Delete** button.
3. To deactivate users, select them, click the **Edit** button, and set the Status field to **Inactive**.



Note:

If you use HR Toolkit, users that are no longer part of the feed or part of your organization will automatically be deactivated. A License Notification message will display when opening the Desktop Client if the user license has been exceeded.

CHAPTER 84: Email an Everyday User

Whether your organization uses Microsoft Outlook or SMTP, you can email an everyday user.

> **Note:**
> If your organization uses Microsoft Outlook, you can continue to use this email system to send emails to users; otherwise, to email a user using the SMTP option, your EMS Desktop Client user account must have an email address.

To email an everyday user, complete these steps:

1. Search for the user whom you are emailing. See Also: Search for a Group or Contact.
2. On the user's window, make sure that the user is selected in the lower pane, and then click **More** > **Email**.

   > **Note:**
   > 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 user, but you can edit this value if needed.

3. Complete and send the email as you normally would.

CHAPTER 85: Configure Groups and Contacts from an Everyday User

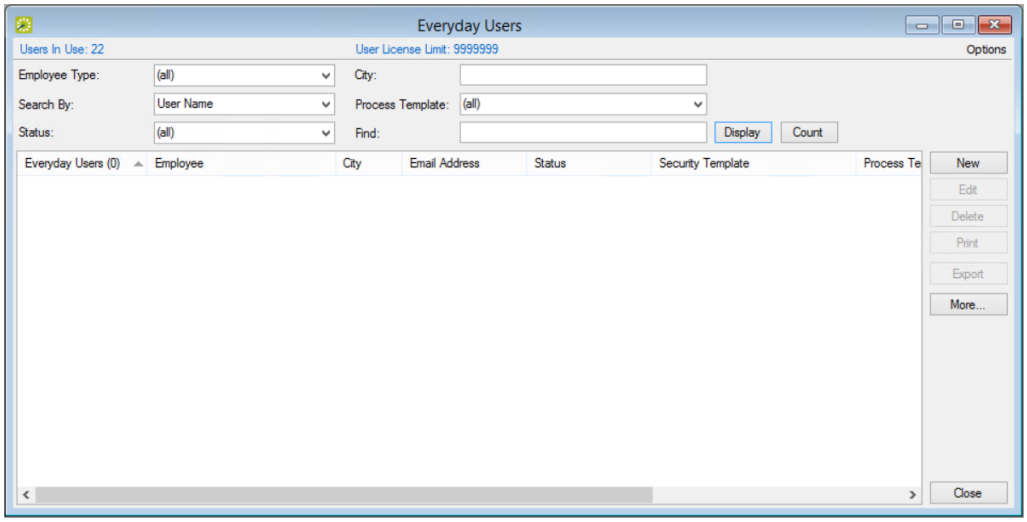
After you have configured a new user, you can create groups and contacts from the user.

- Open the Everyday Users Dialog Box
- Configure a Group from a User
- Configure a Contact from a User

Open the Everyday Users Dialog Box

To open the Everyday Users dialog box and locate everyday user information, follow these steps:

1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Everyday Users**. The Everyday Users dialog box opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.



Everyday Users Dialog Box

2. Locate the user you want to work with. Specify any combination of search criteria, and then click **Display** to see all users that meet the criteria.

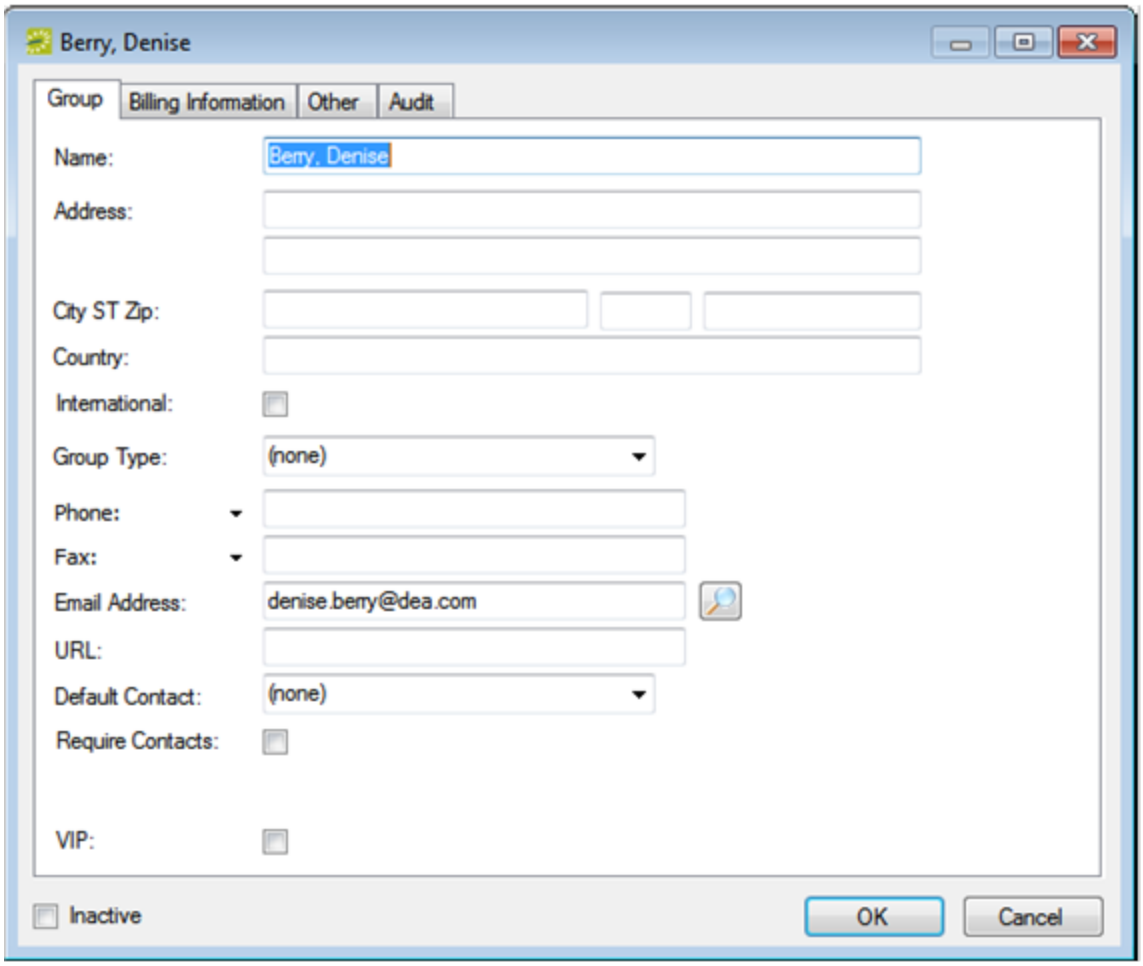
Note:
If you leave the Find field blank, a list of all currently active users appears. This field is not case-sensitive, but entries must be in the correct order. For example, a search string of Bar returns Barry Jones, but not Amanda Barry.

3. Continue to one of the following (below):
   - Configuring a group from a user
   - Configuring a contact from a user

Configure a Group from a User

To configure a group from a user, follow these steps:

1. From the Everyday Users dialog box, select the user from which you are creating a Group, and then click **More** > **Create Group**. The Group dialog box opens. The Name field is automatically populated with the name of the selected user, but you can edit this value if needed.



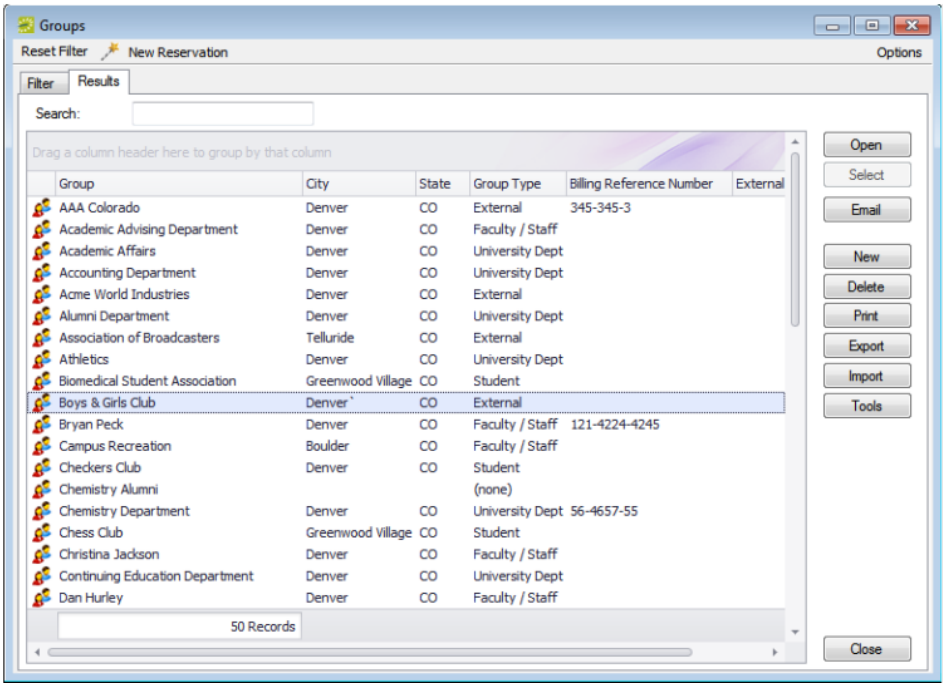
Group Tab for an Everyday User

2. Configure the new Group as needed. See Configure Groups.

Configure a Contact from a User

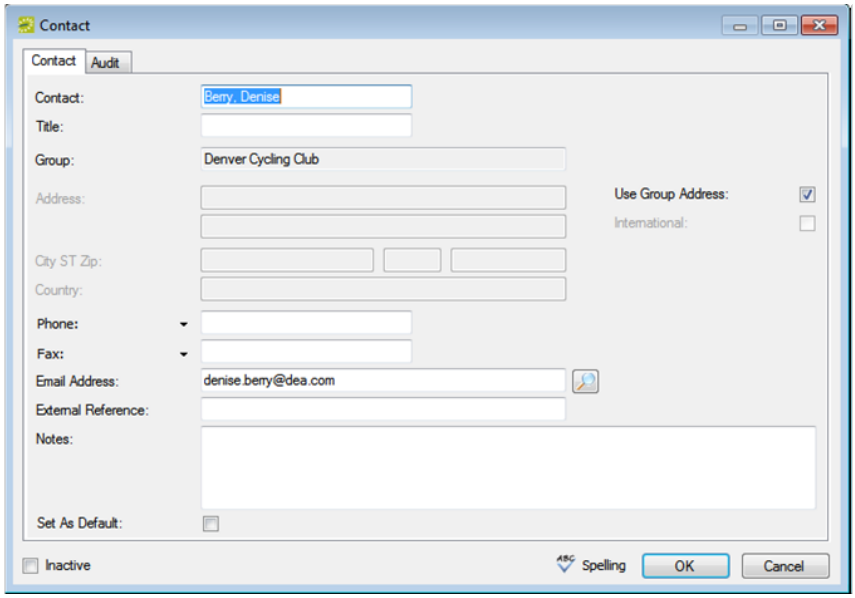
To configure a contact from a user, follow these steps:

1. Select the user from which you are creating a contact, and then click **More** > **Create Contact**. The Groups dialog box opens.



Groups Dialog Box

2. Search for the Group for which you are creating the Contact. See Also: Search for a group and/or contact.
3. Select the Group on the **Results** tab, and then click **Select**. The Contact dialog box opens.



Contact Dialog Box

4. Enter the information for the new contact.

Contact Tab Field Descriptions

Field	Description
Contact	By default, the Contact field is populated with the name of the 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 job title 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 drop-down 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.

Field	Description
External Reference	Links the contact to an outside program or another EMS record if needed.
Notes	Any other information that is pertinent for the contact. This information only displays within the EMS Desktop Client.
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 de-activate the Contact.

Note:
You can click **Spelling** to spell-check before saving.

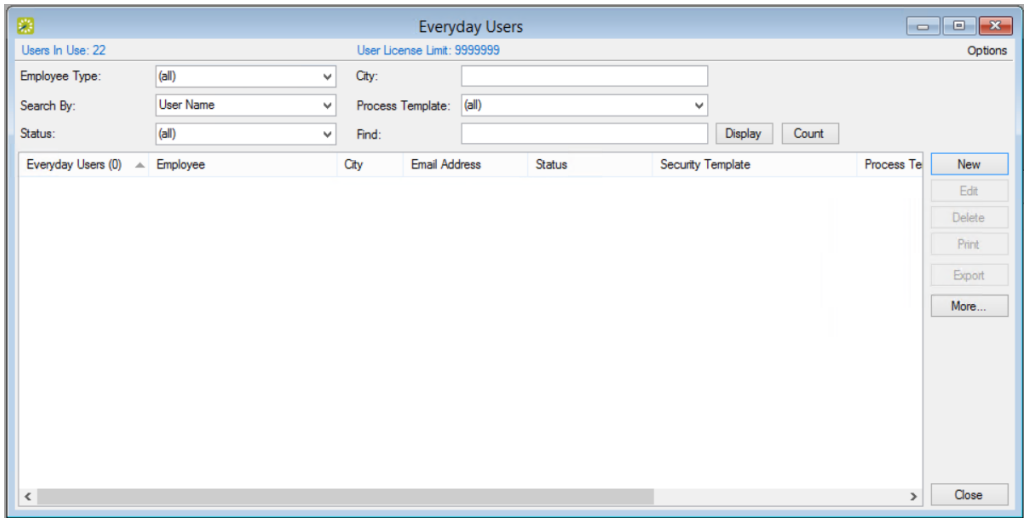
5. Click **OK**. The Contact dialog box closes and the Contact is created from the user and added to the Group. The Group-specific window opens with the Contact selected.

CHAPTER 86: Assign Templates to Everyday Users

This section guides you in assigning everyday user process templates to a single user. To assign these templates to multiple everyday users in a single step, see Assign Web Templates to Multiple Everyday Users.

To assign templates to everyday users, follow these steps:

1. On the EMS menu bar, click **Configuration** > **Everyday Applications** > **Everyday Users**. The Everyday Users window opens.



2. In the Find field (in the upper portion of the screen), search for the user to whom you want to assign Everyday User process templates by entering at least the first three characters of their user name or email.

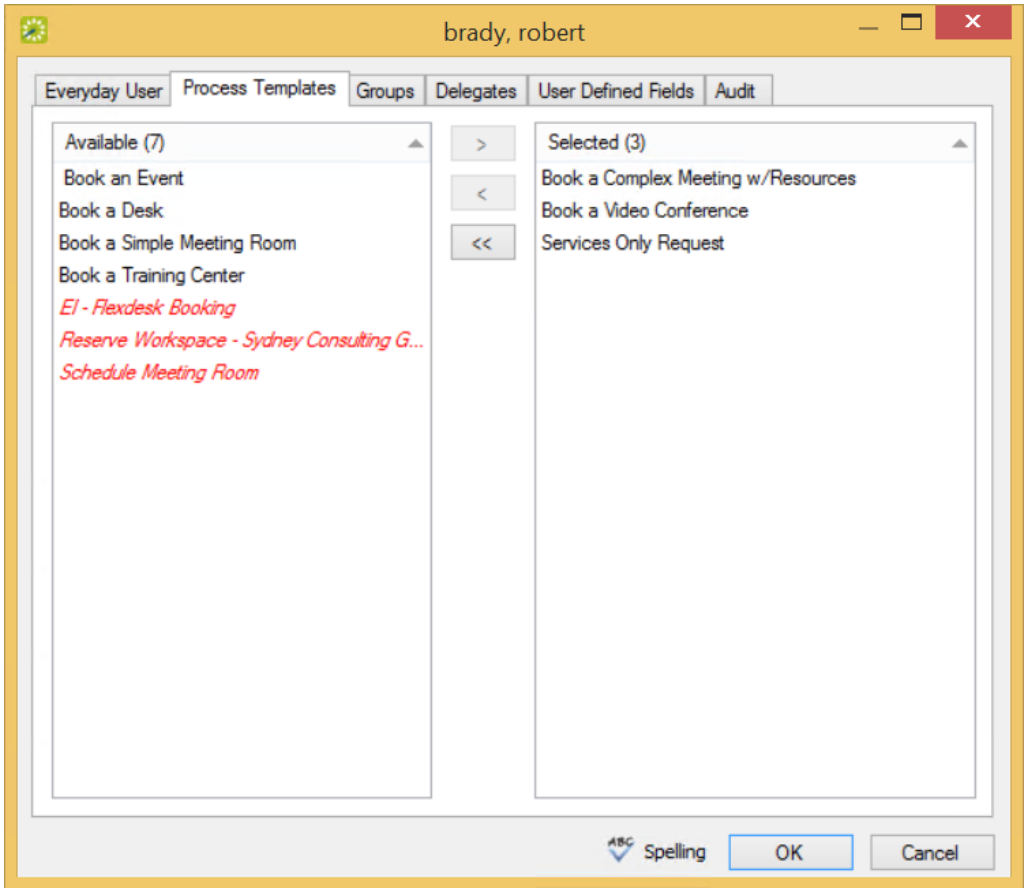
Note:

You can further narrow your search results by:

- Group Type
- City
- Status
- Process Template

3. Click **Display**.
4. Select the user and click the **Edit** button on the right.

5. In the Everyday User editing window, click the **Process Templates** tab.



Process Templates Tab

6. To assign process templates to an Everyday User, move them to the right side using the arrow button. Your selections here will present to the user in EMS Web App as available booking options under "My Templates."
7. Click **OK**. The Everyday Users dialog box closes and returns you to the Everyday Users window.

CHAPTER 87: Configure Everyday User Process Templates

Concepts:

Everyday User—Someone who can request or reserve space and services in any EMS Software application other than EMS Desktop Client. You assign these users to templates.

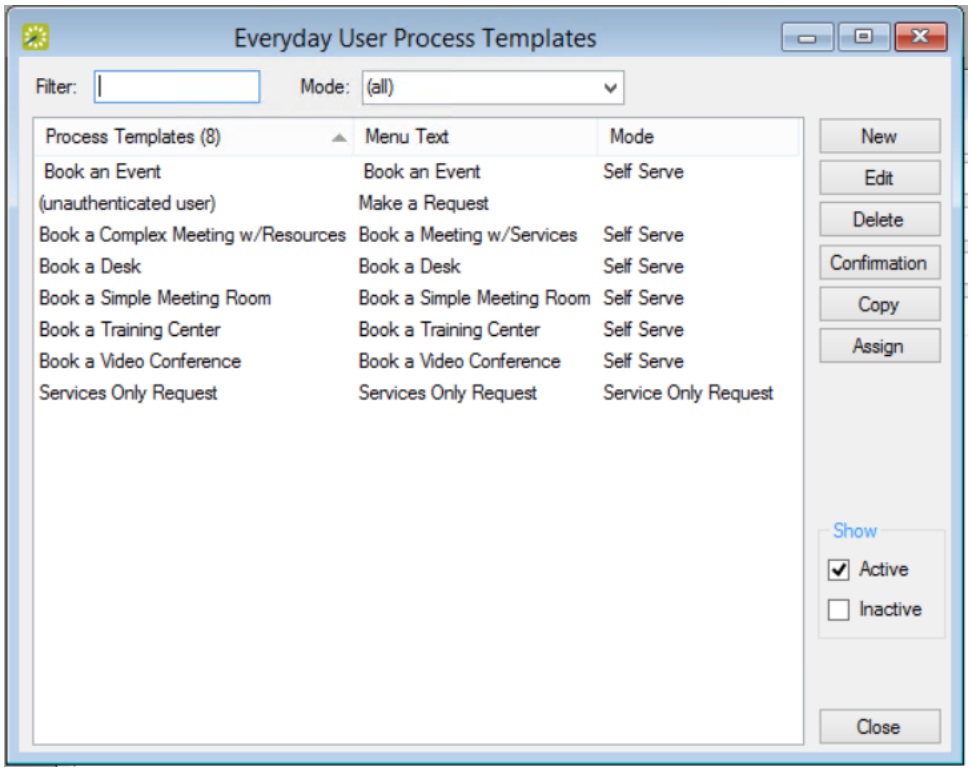
Everyday User Template—Defines and controls what a user can do. EMS uses two types of everyday user templates:

- **Security template**—This is essentially a security profile. It controls which menu items are available to the users assigned to the template, which booking information fields display to them, and other information.
- **Process template**—This is essentially a booking template. It controls what users can do for different types of reservations (conference room, workspace, study room, and so on). This type of template also controls users' date/time restrictions, room security (reserve, request only, no access), and service availability (A/V, catering, and so on).

> **Note:**
> If you have previously used older versions of EMS, you might know booking templates as "Web Process Templates." These are now called "Everyday User Process Templates." These templates define user access and booking behavior in EMS Web App, EMS Mobile App, and EMS for Outlook. Similarly, you might know permissions templates, which control what an Everyday User is able to do, as "Web Security Templates." These are now called "Everyday User Security Templates."

To configure everyday user process templates, follow these steps:

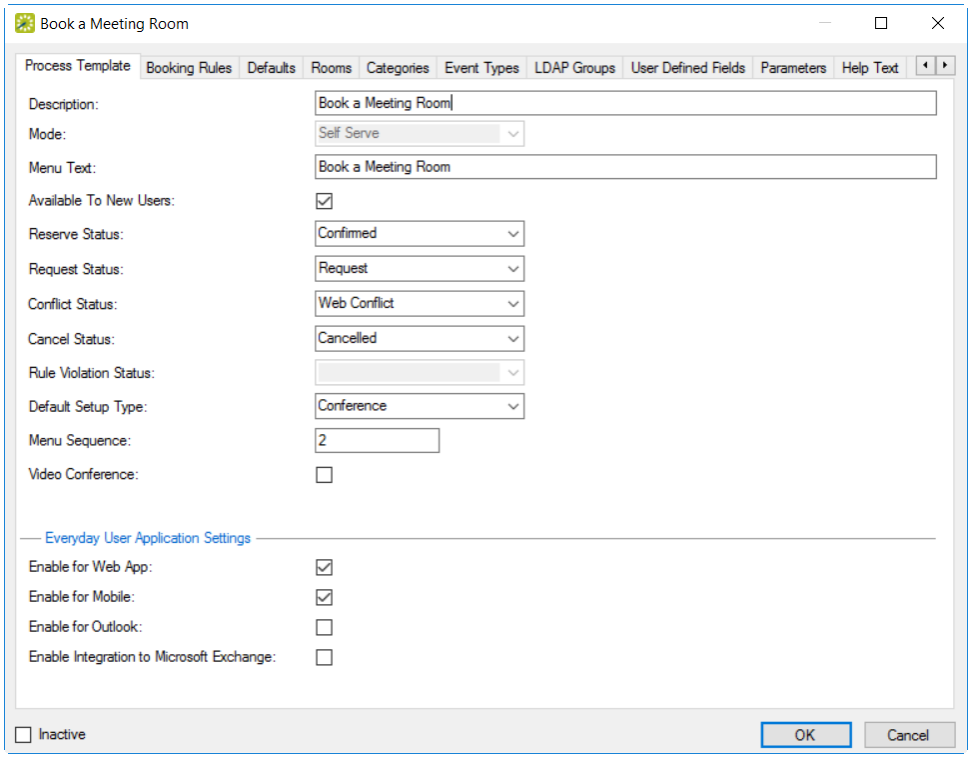
1. On the EMS menu bar, click **Configuration** > **Everyday Applications** > **Everyday User Process Templates**. The Everyday User Process Templates window opens on the Everyday User Template tab.



This window lists the process templates that have been defined for your EMS Web App implementation. The pre-defined user called "(unauthenticated user)" is included in all EMS implementations; you use this template to manage settings for anonymous or “guest” users. For a user to be able to view and use this template, you must assign the user to the template. See Configure Users.

Note:
To view all everyday user process templates in your EMS database, regardless of status, under Show, click **Inactive**.

2. Click **New**. The Everyday User Process Template dialog box displays. Enter the information for the new everyday user process template as needed.



3. Enter the information for the new everyday user process template as needed. For more information on the various tabs and settings, refer to the following:

   - Process Template Tab
   - Booking Rules Tab
   - Defaults Tab
   - Video Conference Tab
   - Rooms Tab
   - Categories Tab
   - Event Type Tab
   - LDAP Groups Tab
   - User-Defined Fields (UDF) Tab
   - Parameters Tab
   - Web Text Tab

- Menu Text Translations Tab
- Terms and Conditions Tab

Important!

The cache must be cleared in the EMS Web App whenever parameter changes are made in the EMS Desktop Client.

Note:

The Request Status field is used to configure booking templates for the "Request/Approval" booking model, in which everyday users request space and administrative users approve those requests (using the Dashboard menu icon). For example, if you set this field to Request, then the booking will not be finalized until an administrator has approved it.

Note:

If you are configuring a template for booking desks and workspaces or "hoteling," see Create Templates for Desks and Workspaces.

CHAPTER 88: Process Template Tab

To configure the main settings for an everyday user process template, follow these steps:

1. Open the **Process Template**tab of the Everyday User Process Template dialog box.
2. From the fields on the Process Template tab, configure the process template settings (see the following table for more information about the fields).

Process Template Tab Fields

Field	Description
Description	Read-only information.
Mode	Determines how a user can make a reservation in EMS Web App. • Request - Everyday Users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not provide options for the Everyday User to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS Desktop Client user. The room is not taken out of inventory until this step has occurred. • Self Serve - Registered Everyday 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 Everyday Users who are attached to this Everyday User Process Template must be able to request rooms that have a video conferencing feature. • Service Only Request - Allows Everyday 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 Everyday User Process template are enabled/disabled based on the selected mode.

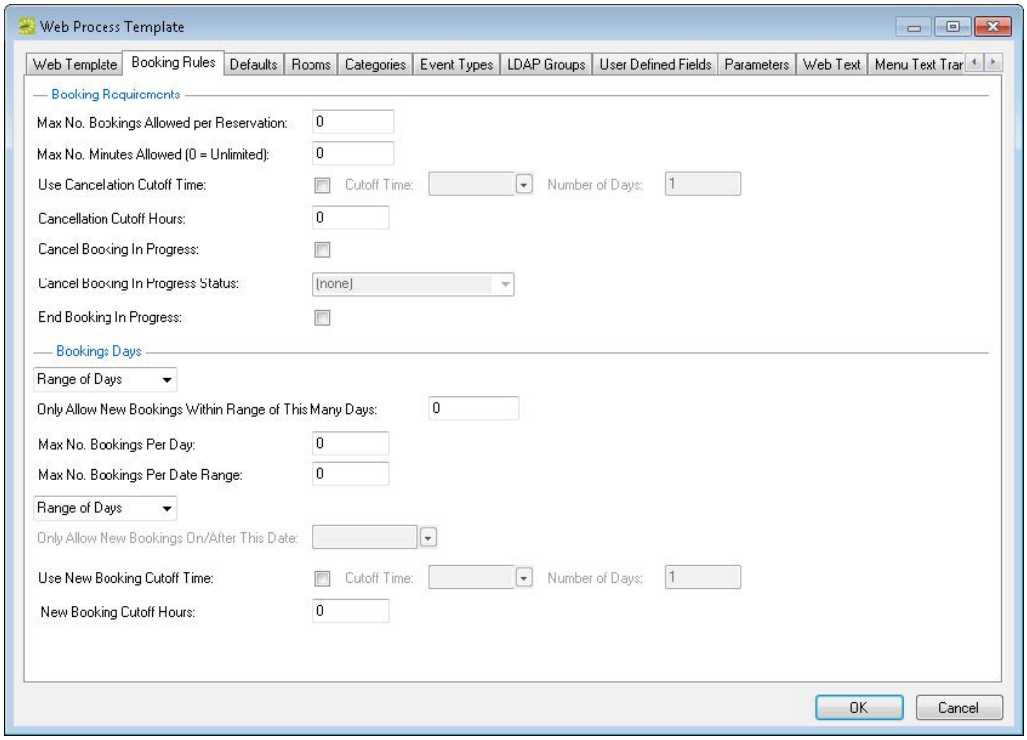
Field	Description
Menu Text	The menu text or link that an EMS Web App user sees when requesting a room using this Everyday User Process template.
Available to New Everyday Users	Select this option if this Everyday User Process template is to be automatically assigned to newly registered Everyday Users.
Enable for Mobile Device	Select this option if this Everyday Process template is to be available (in an appropriate format) on a mobile device browser.
Outlook	Enables the Everyday Process template for use with the EMS for Outlook Add-in.
Parent Menu	The parent menu item on the EMS Web App 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.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by Everyday 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 Everyday 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 Everyday User who is attached to this template is reserving a room in the EMS Web App. The Everyday 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 Everyday User can choose a date and time that is convenient for all attendees and then send invitations through the EMS Web App, which attendees receive and can manage through Outlook.

Field	Description
Allow Everyday User Personalization	Select this option if Everyday Users must be able to use the Options feature to customize their settings on EMS Web App 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.
Available at Checkout	Select this option if the Everyday Users who are attached to this template must be able to select category resource items on the EMS Web App “checkout page” (the last page in the Room Request process) in EMS Web App.

CHAPTER 89: Booking Rules Tab

To configure booking rules for an everyday user process template, follow these steps:

1. Open the **Booking Rules** tab of the Everyday User 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

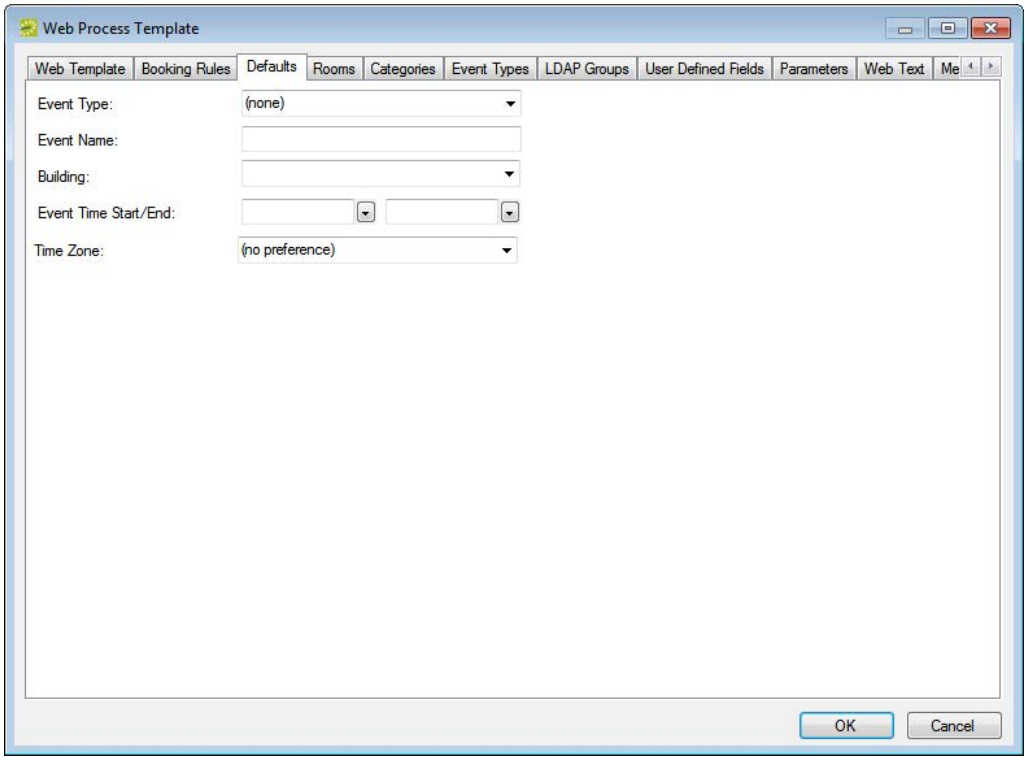
enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day.

4. Optionally, select one or both of the following:
   - Cancel Booking in Progress—An Everyday 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 an Everyday User cancels after the booking is already in progress.
   - End Booking in Progress—An Everyday User can end a booking that is in progress early, which makes the room available to other Everyday 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 drop-down 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 drop-down 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. 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 EMS Web App, 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.
7. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template.

CHAPTER 90: Defaults Tab

To configure the default settings for an everyday user process template, follow these steps:

1. Open the **Defaults** tab of the Everyday User Process Template dialog box.



Defaults Tab

2. Enter the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone. These defaults values automatically populate the correct fields on the Room Requests page, but a user can edit them as needed.

> **Note:**
> If the appropriate event type is not available, you can configure it (see Configure Event Types). If the appropriate building is not available, you can configure it (see Configure Buildings).

3. Continue with any other configuration for the templates as needed; otherwise, click **OK** to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

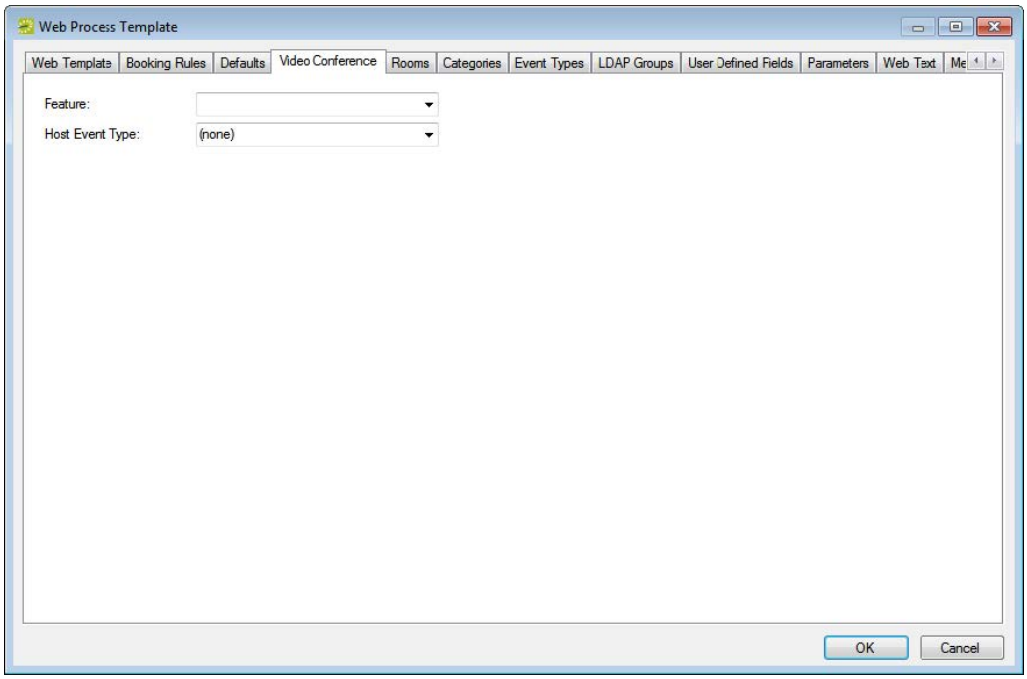
CHAPTER 91: Video Conference Tab

Note:

The Video Conference tab is available only in EMS Enterprise and only if the **Video Conference** option was selected on the **Everyday User Template** tab. See Configure Video Conference Capabilities for information on how to configure the information on this tab correctly so that users who are attached to this everyday user process template can request rooms that have a video conferencing features.

To configure video conference settings for an everyday user process template, follow these steps:

1. Open the **Video Conference** tab of the Everyday User Process Template dialog box.



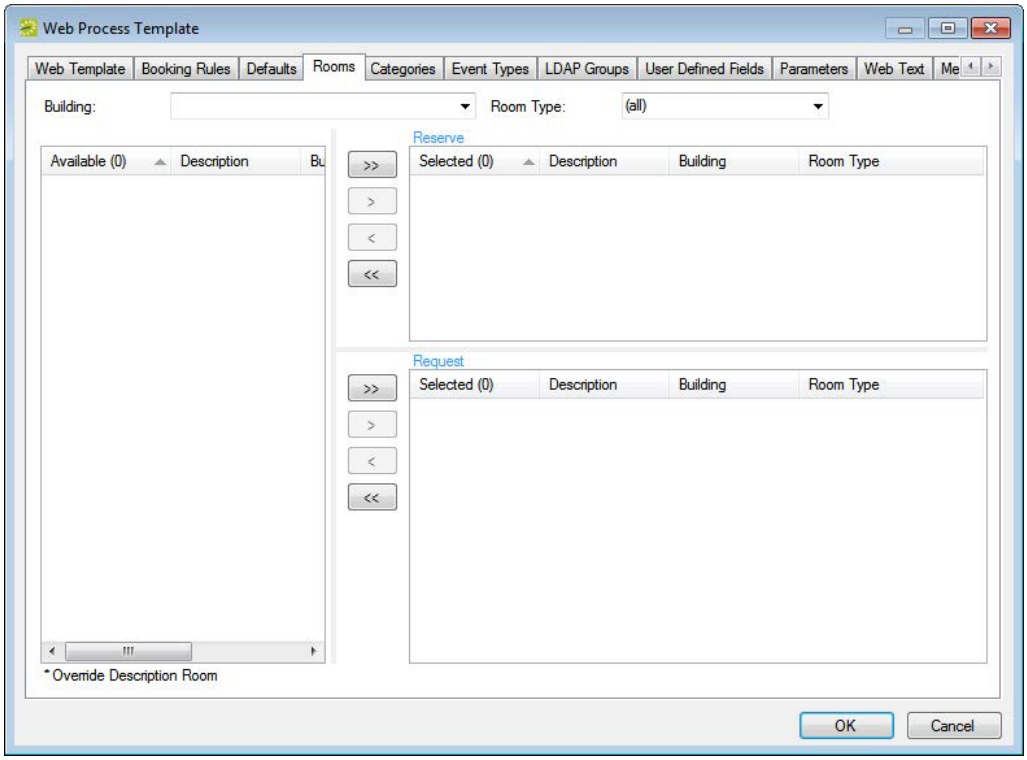
Video Conference Tab

2. From the drop-down list(s), make the appropriate selection(s).

CHAPTER 92: Rooms Tab

To configure room settings for an everyday user process template, follow these steps:

1. Open the **Rooms** tab of the Everyday User Process Template dialog box.



Rooms Tab

2. Specify your Building and Room Type search criteria.

> **Note:**
> On the Building drop-down 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 Configure Buildings, Configure Areas, Configure Public Views, or Configure Room Types.

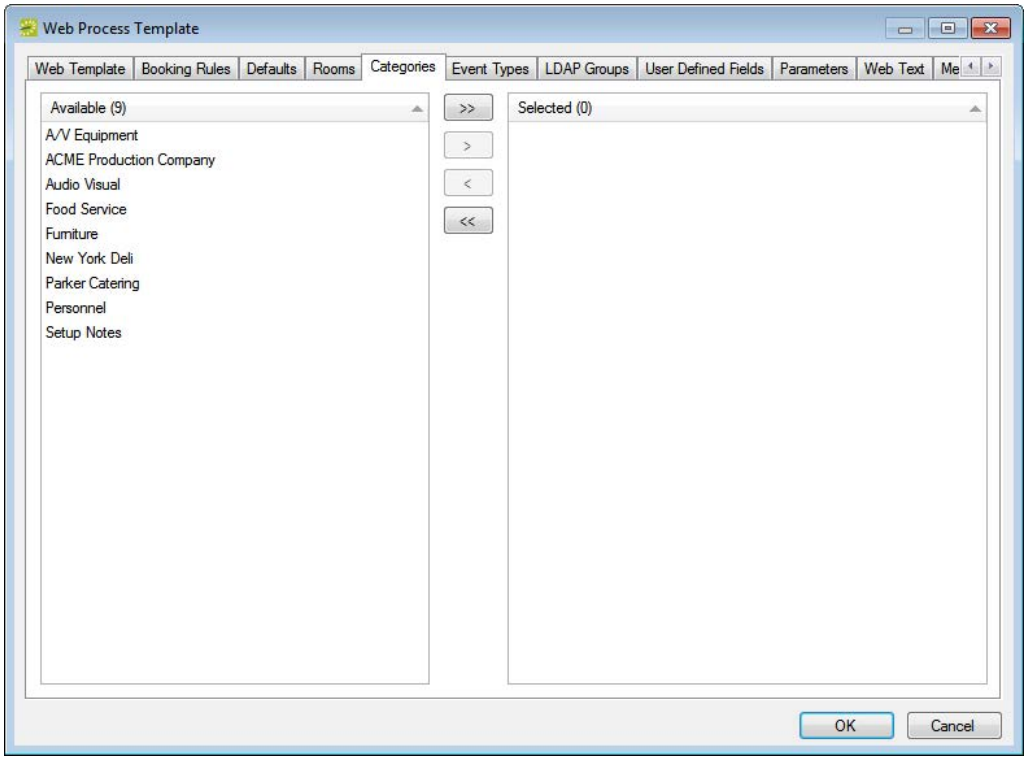
3. On the **Available** list, select the room or CTRL-click to select the multiple rooms that users who are attached to this Everyday User process template must be able to book, and then click the Move button (>) to move the selected rooms to the appropriate **Selected** list.

- 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 Everyday User Template tab) into the Request pane.

CHAPTER 93: Categories Tab

To configure categories for an everyday user process template, follow these steps:

1. Open the **Categories** tab of the Everyday User Process Template dialog box.



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 Everyday User process template must be able to add to a booking, and then click the Move button (>) to move the selected categories to the **Selected** list.

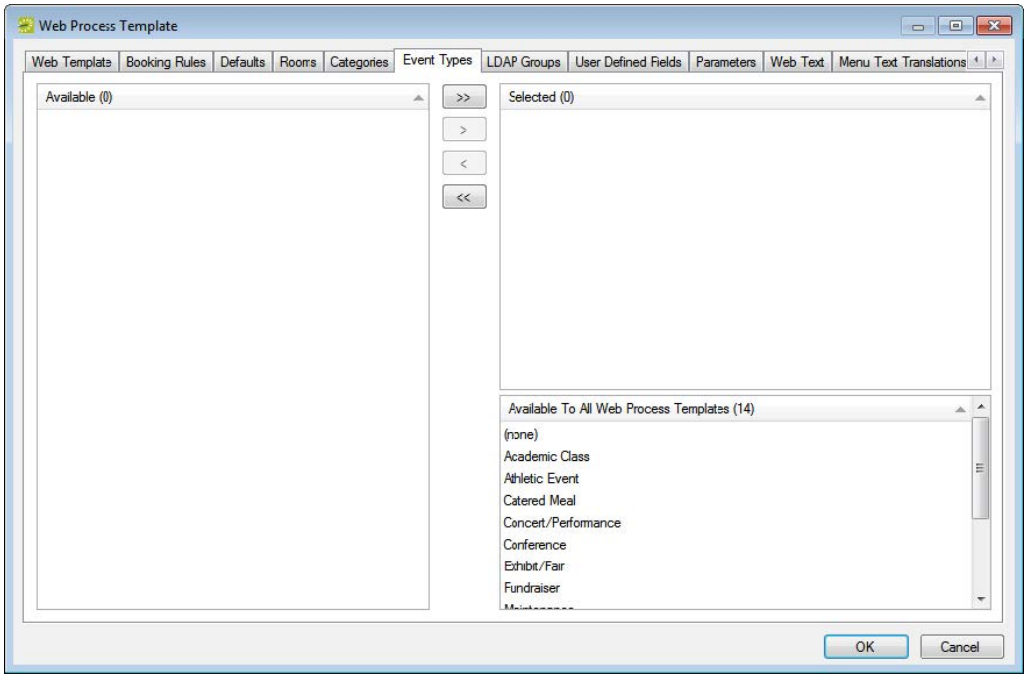
> **Note:**
> If the appropriate category is not available, you can configure it. See Configuring Categories.

3. Continue with any other configuration for the templates as needed; otherwise, click **OK** to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 94: Event Type Tab

To configure event types for an everyday user process template, follow these steps:

1. Open the **Event Types** tab of the Everyday User Process Template dialog box.



Event Type 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 Everyday User Process 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 Everyday User Process template into the **Selected** pane.
   - The **Available to All Everyday User Process Templates** pane displays all the event types that have the **Available to all Everyday User Process Templates** option selected. See Configure Event Types.
3. Continue with any other configuration for the templates as needed; otherwise, click **OK** to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

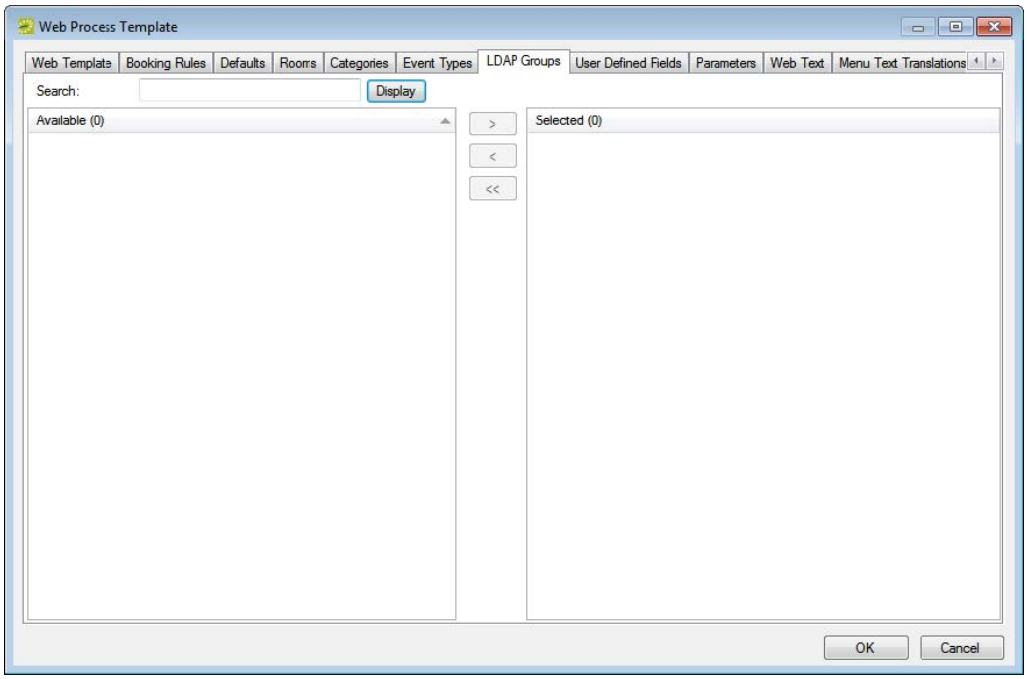
CHAPTER 95: LDAP Groups Tab

You use this tab to assign Everyday User Process templates to EMS Web App users based on LDAP Groups that are defined in your directory service, for example, Active Directory.

> **Note:**
> Everyday User Process templates that are assigned via LDAP do not need to be explicitly assigned to Everyday user records. When Everyday Users log in to EMS Web App, they "inherit" the Everyday User Process templates based on the LDAP groups to which they belong.

To configure LDAP groups for an everyday user process template, follow these steps:

1. Open the **LDAP Groups** tab of the Everyday User Process Template dialog box.



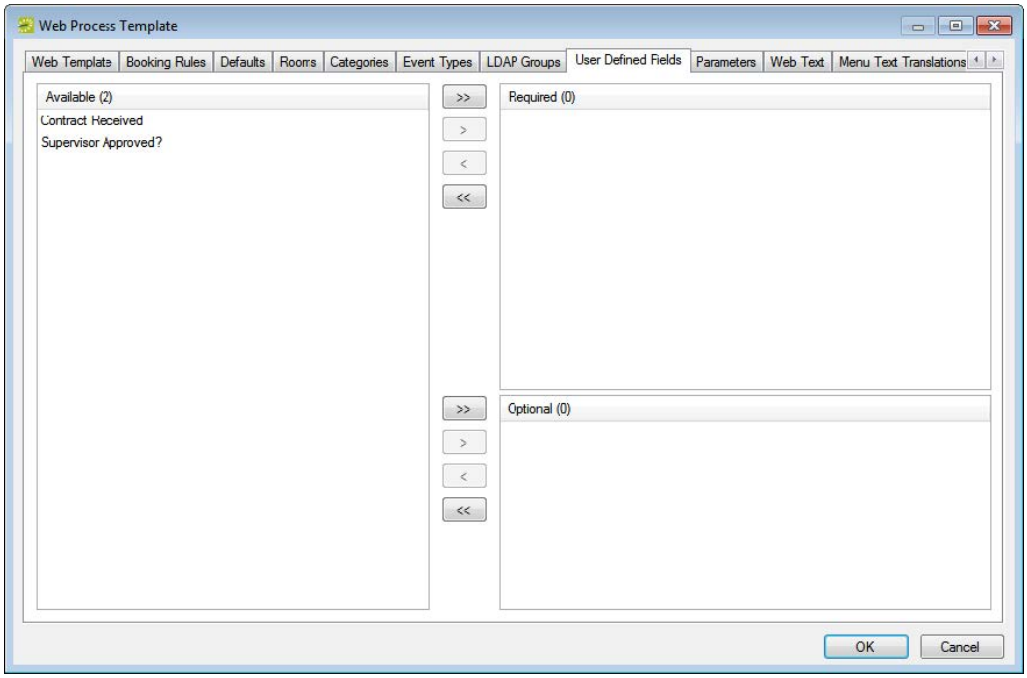
LDAP Groups Tab

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 an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 96: User-Defined Fields (UDF) Tab

To configure user-defined fields for an everyday user process template, follow these steps:

1. Open the **User Defined Fields** tab of the Everyday User Process Template dialog box.



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 Everyday User 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.

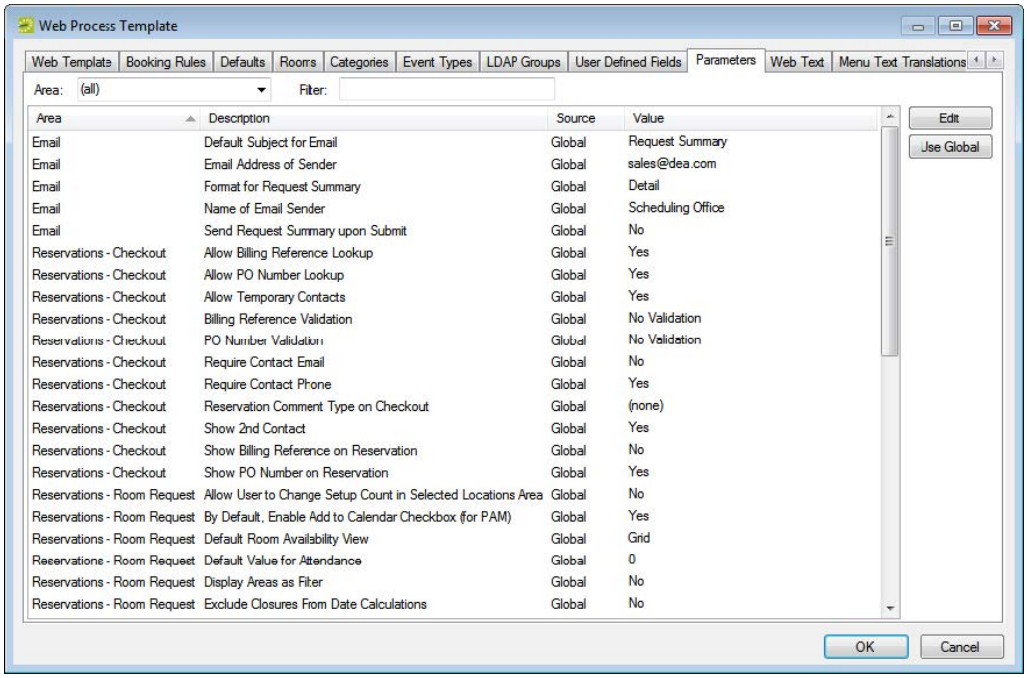
> **Note:**
> If the appropriate UDF is not available, you can configure it. See Configure User Defined Fields (UDFs).

3. Continue with any other configuration for the templates as needed; otherwise, click **OK** to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 97: Parameters Tab

To configure template-specific parameters for an everyday user process template, follow these steps:

1. Open the **Parameters** tab of the Everyday User Process Template dialog box.



Parameters Tab

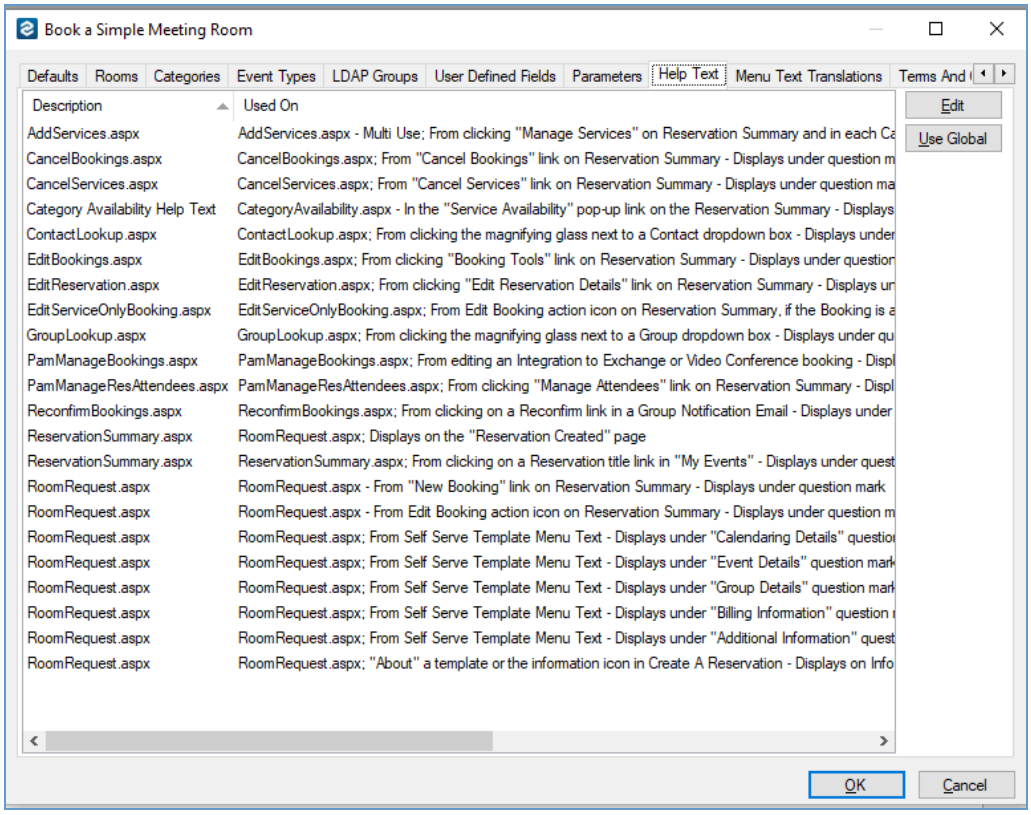
2. By default, an Everyday User Process template inherits its parameter settings from the global list of EMS Web App parameters. You can review the values for these parameters, and edit the values as needed for the template.
   - To edit the value for a parameter, select the parameter, and then click **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 an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

See Also: System Parameters (provides detailed information about the global parameters)

CHAPTER 98: Help Text Tab

To configure help text for an everyday user process template, follow these steps:

1. Open the **Help Text** tab of the Everyday User Process Template dialog box.



Help Text Tab

2. By default, web text items inherit their settings from the global Web Text list. (See Also: Configure Web Text.) You can use the list of help text items on the **Help 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 an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 99: Menu Text Translations Tab

> **Note:**
> You need to provide information on the **Menu Text Translations** tab only if a foreign language translation has been defined for Everyday User templates.

To configure menu text translations for an everyday user process template, follow these steps:

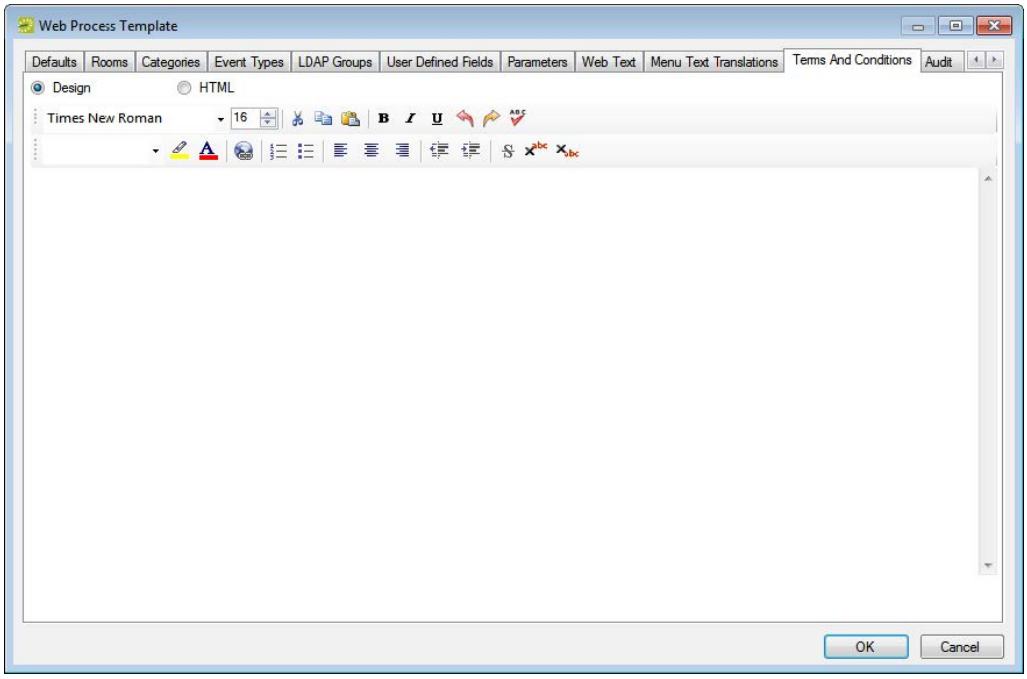
1. Open the **Menu Text Translations** tab of the Everyday User Process Template dialog box.
2. For each translation that is displayed on the tab, click in the **Text** field, and then enter the appropriate translation for the menu text (the menu text or link that an EMS Web App user sees when requesting a room using this Everyday User process template).
3. Continue with any other configuration for the templates as needed; otherwise, click **OK** to save the changes to the template. For an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 100: Terms and Conditions Tab

Before users can submit reservations through the EMS Web App, they must agree to the Terms and Conditions that you specify on the **Terms and Conditions** tab.

To configure terms and conditions for an everyday user process template, follow these steps:

1. Open the **Terms and Conditions** tab of the Everyday User Process Template dialog box.



Terms and Conditions Tab

2. Select either the **Design** or **HTML** radio button to format a Terms and Conditions message that will be displayed in the EMS Web App when an Everyday User selects a room.
   - **Design**—This option is selected by default and uses the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that the message is displayed the way that you want in the Terms and Conditions.
   - **HTML**—To use the HTML option, select the button and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that the message 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 an Everyday User to be able to view and use this template, you must assign the user to the template. See Assign Templates to Everyday Users.

CHAPTER 101: Configure Everyday User Security Templates

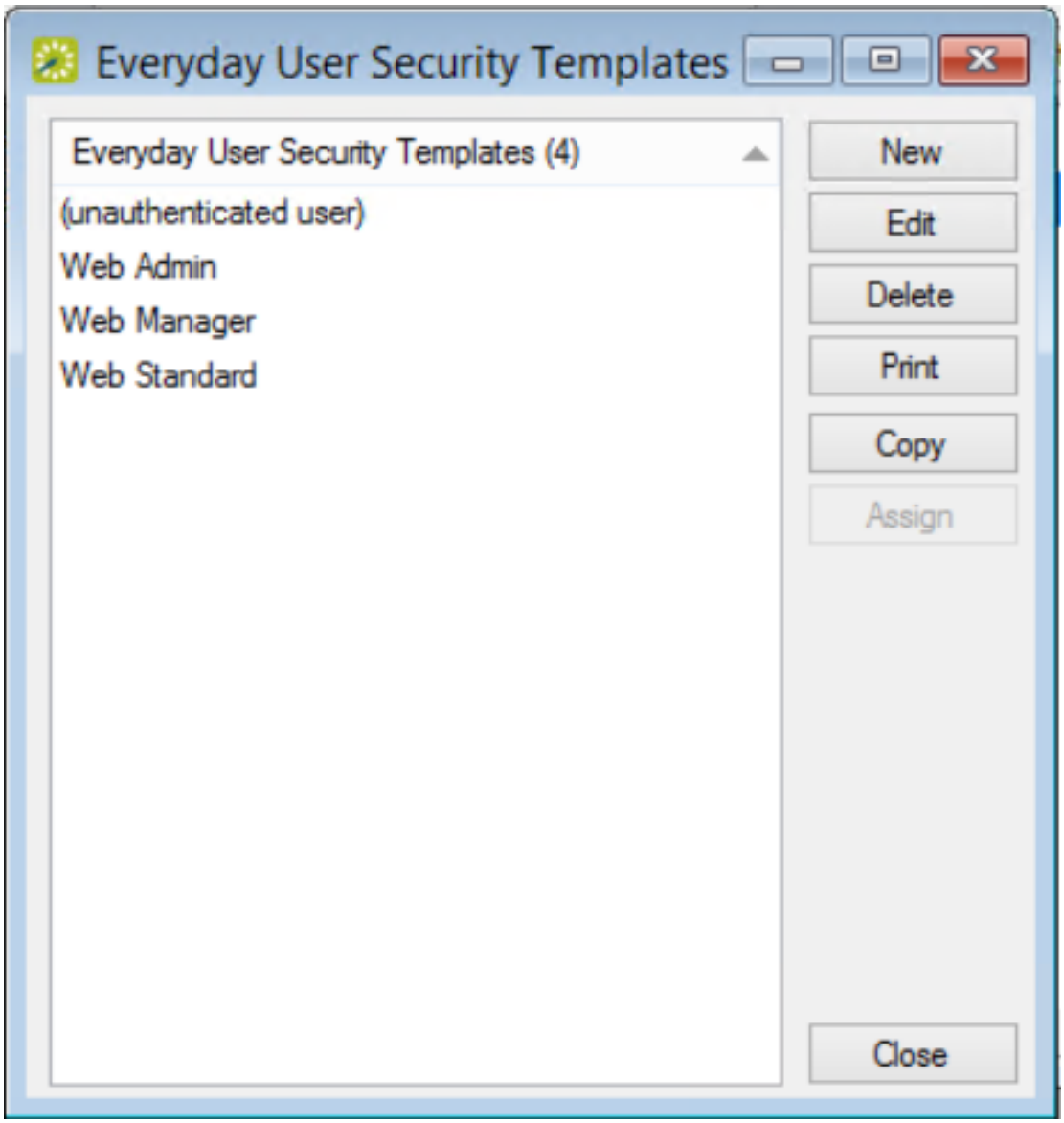
A security template specifies which menu items are available to the users who are assigned to the template, which event information fields can be viewed, and other information.

This topic will provide information on the following steps:

- Enter Security Template Settings
- Assign Roles to Users
- Set Tooltip Display
- Finalize the Template

1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Everyday User Security Templates**.

   The Everyday User Security Templates window opens. This window lists the one user role (unauthenticated user) used in the EMS Web App and EMS Mobile App, as well as any other security templates that have been defined.



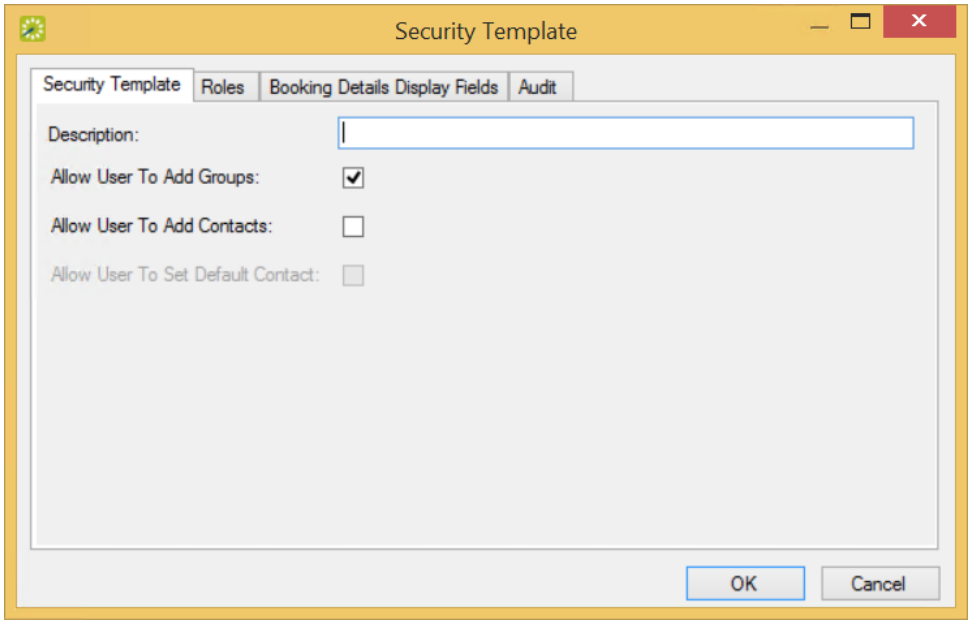
Everyday User Security Templates Window

Note:
The "(unauthenticated user)" role controls what happens when users do not have a log in access an EMS Everyday User application such as EMS Web App and EMS Mobile App.

> **Note:**
> The remainder of this procedure describes how to configure a security template "from scratch." You can also configure a security template by copying an existing rule. Select the security template that you want to Copy then skip to Step 3. To assign an existing security template to multiple users, See Also: Assigning a Security Template to Multiple Users.

2. Click **New**.

   The Security Template dialog box opens on the **Security Template** tab.



Security Template Tab

Enter Security Template Settings

3. Enter the information for the new everyday user role.

Option	Description
Description	The description or name for the 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 security template can select from a list of existing Groups in your EMS database to add to the users' accounts 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 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 template to be able to specify a default Contact for a selected Group when submitting a request or making a reservation.

Assign Roles to Users

4. Roles are the tasks that an assigned user can do. Open the **Roles** tab, and on the Available list, select the role (CTRL-click to select multiple roles) for the user(s) are to be assigned to this template, and then Move (>) to the Selected list.

Role	Description
Allow Check In	Allows a user to check in to a booking from EMS Web App, the EMS Kiosk, and EMS Mobile App.
Browse Events	Provides access to the Events calendar in EMS Web App.
Browse	Allows a user to browse for available rooms in a Schedule view.

Role	Description
Create\Edit an Account	For the (unauthenticated user) template, allows a new user to create his/her own EMS Web App user account. This new everyday user account is set to active or pending based on your EMS Web App parameter settings. For the authenticated users, this role determines if an existing everyday user can access the Edit My Account area within EMS Web App.
Custom Events	Provides access to any custom events calendars created.
Delegation	Allows EMS Web App users to delegate control of their reservations (new and existing) to other EMS Web App everyday users.
Browse People	Allows an EMS Web App user to view a specific Group's reservations for today.
Location Details	Allows a 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 EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a EMS Web App user to view and book rooms on a floor plan.
View Reservation Summary	Allows an EMS Web App user to view the Reservation Summary page when the user clicks on the link from notification/confirmation emails. Note that the reservation owner, or delegate of the owner, can view the Reservation Summary page through the email link even if the role has not been assigned. Administrators can use the View Reservation Summary role to limit access to reservation information from forwarded emails.
Web Administrator	Provides access to various administrative functions within EMS Web App such as clearing the cache, enabling help text edit mode, and enabling detailed errors.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.
Kiosk Provisioning	This role allows users to log into the EMS Kiosk App as an Administrator and provision profiles.

Set Tooltip Display

5. The **Booking Details Display Fields** tab houses the information that appears when a EMS Web App user browses events in the Browse Events area or browses for space in the Browse for Space Area. Open this tab, and on the Available list, select the information you want displayed (CTRL-click to select multiple items), then Move (>) to the Selected list.

Finalize the Template

6. Click **OK**. The security Template dialog box closes. The changes are saved to the template and you return to the security Templates window.

> **Note:**
> You can delete a security template by selecting it from the Everyday User Security Template window and clicking **Delete**. If the template is assigned to a user, you will be prompted to assign another template to that user before deleting it.

You can also print a security template information with the **Print** button, which will print a list of your templates or a list of user roles showing how they are mapped to security templates.

See Also:

- Everyday User Security Template Field Definitions
- Assign Security Templates to Multiple Everyday Users
- Configure EMS Web App Menus
- Configure Intents
- Configure Help Text
- Configure Web Text
- Configure Language Translations
- Configure Confirmation Behavior for Everyday User Applications
- Create Templates for Desks and Workspaces
- Everyday User Process Template Field Definitions
- How Do I Allow Invitations on a Booking Template?

CHAPTER 102: Everyday User Security Template Field Definitions

Security Template Tab

Option	Description
Description	The name for the web security template. **Note:** Maximum of 50 characters, including spaces.
Allow User to Add Groups	Enables users to add existing Groups for which they book space to their accounts. Selected by default. Users can add existing Groups for which they make reservations to their accounts.
Allow User to Add Contacts	Enables users to indicate if a Contact should appear by default when the Group is selected for a reservation. Select this option if you want users to add existing Contacts to existing Groups on their account.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users to assign default contact for a Group when making reservations.

Roles Tab

Role	Description
Allow Check In	Allows a user to check in to an event in rooms requiring check-in.
Browse Events	Allows the user to view a schedule of events at the organization as well as more information about these events.
Browse Locations	Allows the user to view a schedule view of rooms at the organization.
Create\Edit an Account	Allows new unauthenticated users ("guests") to create user accounts (set to Active or Pending based on your parameter settings). For authenticated users, allows users to change their account information.

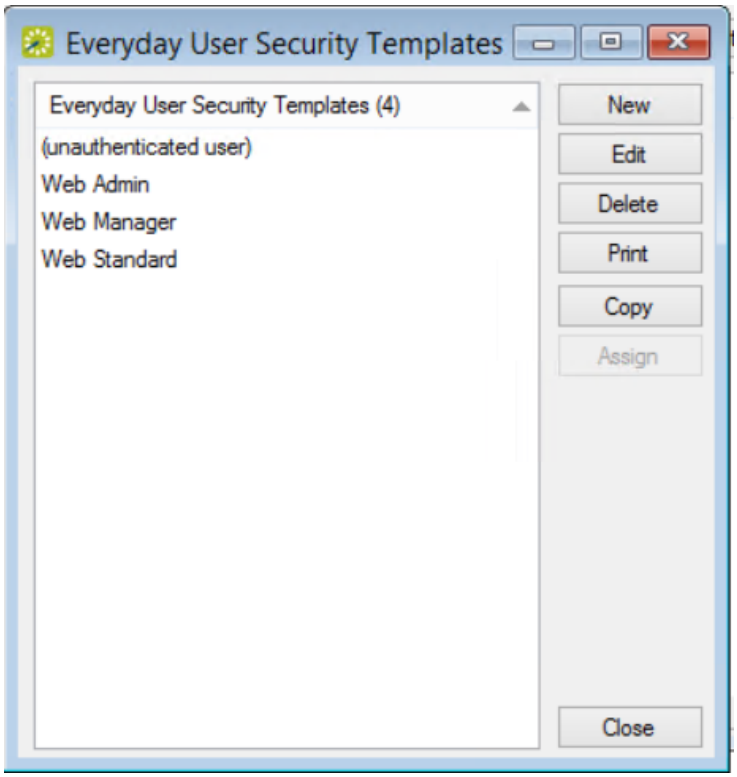
Role	Description
Custom Events	Allows users to view a customized schedule of events created by an Administrator using the Generate Custom Link utility.
Delegation	Allows users to assign other users as delegates for impersonation.
Browse People	Allows users to look up Groups at their organization to see where these Groups are meeting today.
Location Details	Allows users to view details (room type, size, phone, features, setup types, images and so on) about a room or a building.
Login\Logout	Allows unauthenticated users ("guests") to log in to EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a Everyday User to view and book rooms on a visual floor plan. If licensed for the additional Floor Map module, users can view and request rooms from a floor map of a building.
Web Administrator	Enables the Admin Functions menu option for these users designated as administrators. The menu controls various administrative functions within EMS Web App, such as clearing the cache, enabling help text edit mode, displaying detailed error messages, and configuring optional integration modules.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.
View ReservationSummary	This security role allows Administrators to configure unauthenticated access for viewing reservation summary details. For example, if a host forwards a confirmation with a View Reservation Summary link, this security role allows the recipient to view the full details of the reservation when clicking the summary link.

CHAPTER 103: Assign Security Templates to Multiple Everyday Users

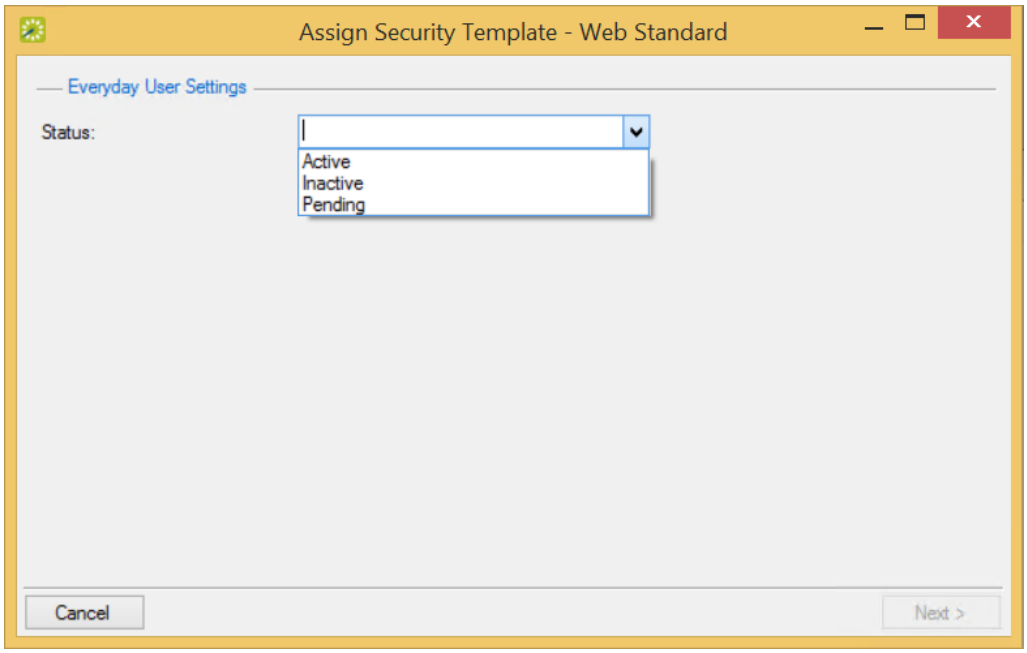
When you configure an everyday user, you can assign one security template and multiple process template to that user. Instead of assigning templates one at a time to individual everyday users, you can assign a security template to multiple users in a single step.

To assign security templates to multiple everyday users, follow these steps:

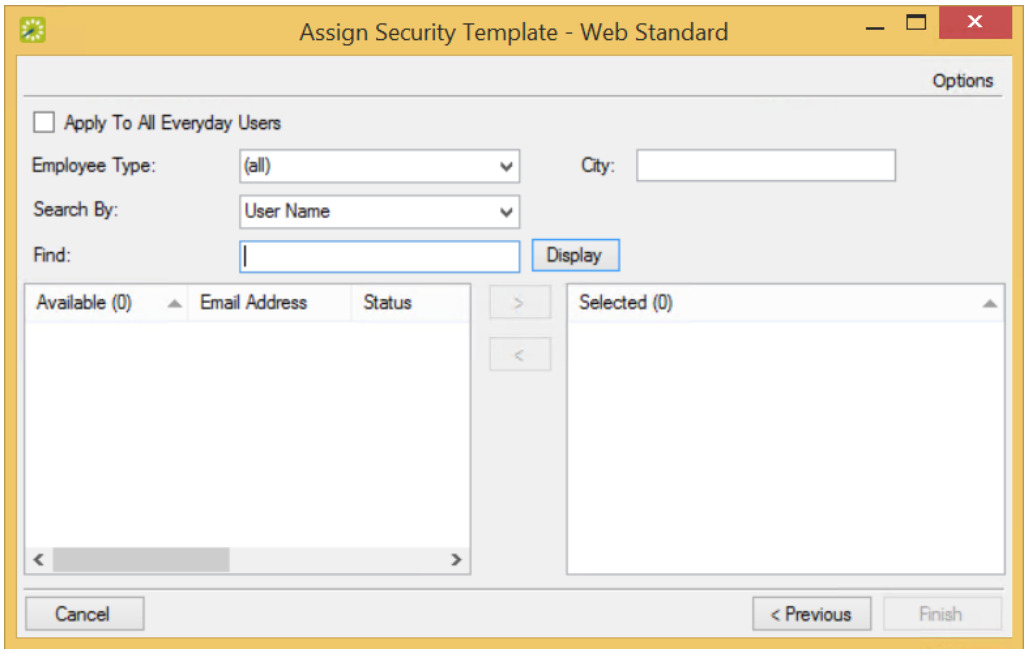
1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Everyday User Security Templates**. The Everyday User Security Templates window opens. The window lists security templates that have been defined for your implementation. The "(unauthenticated user)" template is reserved for guest users.



2. Select a security template other than "(unauthenticated user)" to assign to one or multiple users, and then click the **Assign** button. The Assign Security Template window opens, first prompting you to filter everyday users by status.



3. Select the user status and then click **Next**. The Assign Security Template window updates to list users to whom you can assign the security template.



4. Narrow the selection of users you want to assign to the template using either of the following methods:

- To assign the selected security template to all the users you picked in Step 3, click the **Apply to All Everyday Users** checkbox.
- To assign the security template to only a few of the users you picked in Step 3, search for them in the Find field (using the other fields in this area to narrow your search), and click **Display**. The users who meet your search criteria are displayed in the Available list.

5. On the Available list, select the user (CTRL-click to select multiple users) to whom you are assigning the template, and then Move (>) to the Selected list.
6. Click **Finish**. A message confirms that the template was assigned successfully.
7. Click **OK** to close the message and return to the Everyday User Security Templates window.

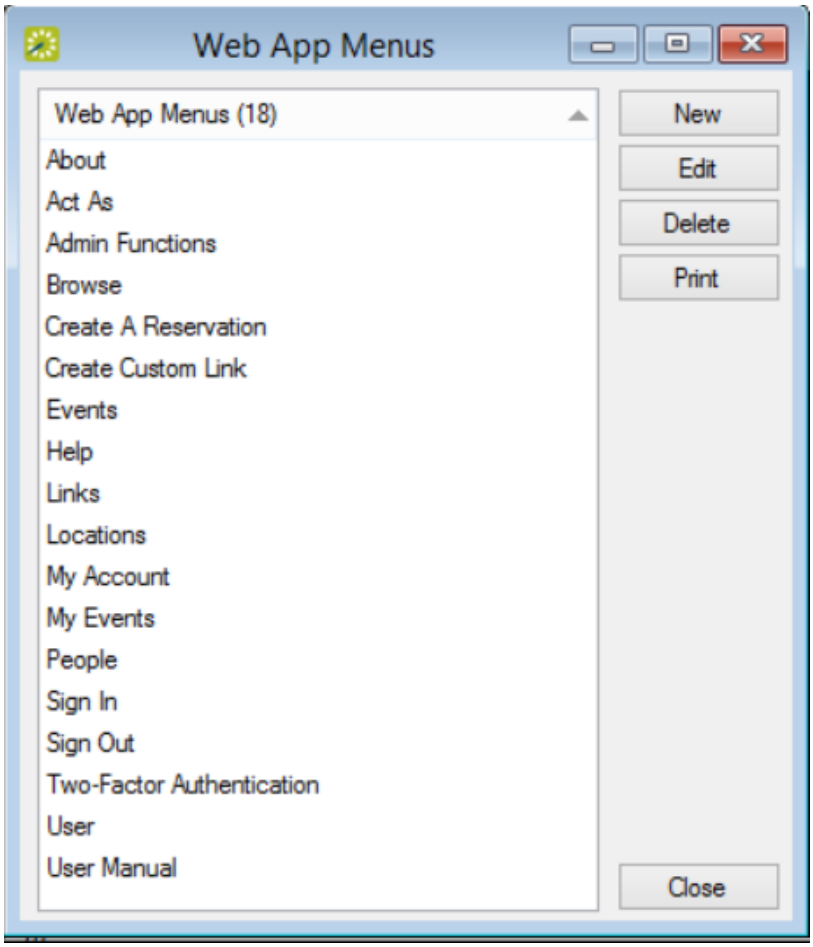
CHAPTER 104: Configure EMS Web App Menus

When the EMS Web App is first installed, the main menu has a layout that determines the following:

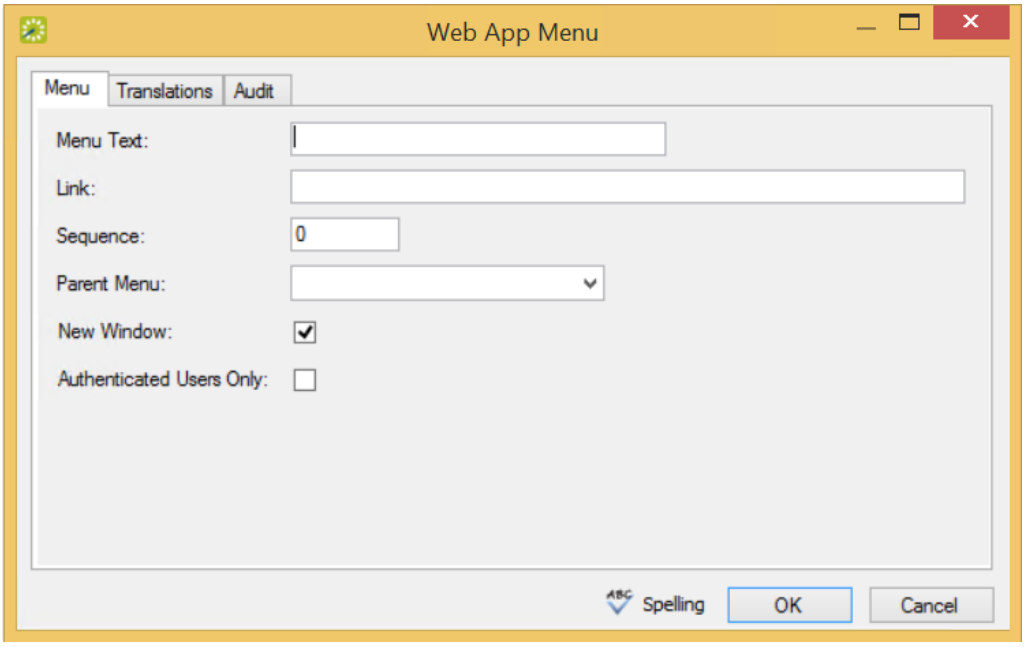
- The default parent menu options.
- The order of the parent options in the main menu.
- The child options that appear under each parent menu option.
- The order of the child options under each parent menu option.

You can add customized menu items to the existing list of system menus. These custom items can be links to EMS Web App pages or to websites outside EMS Web App.

1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Web App Menus**. The Web App Menus window opens. This window lists all the current parent menu items and child options in alphabetical order. Buttons to the right enable you to create new menus, change existing ones, delete, and print.



2. To configure a new menu, click **New**. The Web App Menu dialog box opens. The **Web App Menu** tab is the active 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 EMS Web App menu.
Sequence	A number that indicates the order in which this menu option is to appear 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	The URL or web address for the menu (for example, www.myorganization.com).
Parent Menu	The primary menu under which this new menu item is found.

Field	Description
New Window	Select this option if this new menu item should open in a new browser window or tab (with EMS Web App remaining open behind the new window or tab.
Authenticated Users Only	Select this option if access to this new menu item is restricted to only those users who have logged in to EMS Web App.

4. If translations have been defined for everyday user templates (see Configure Language Translations), 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 App Menu dialog box closes and returns you to the Web App Menus window with the newly configured menu option displayed in the window.

Note:
If you have EMS Web App open, you might have to log out and then log back in to see the new menu item.

CHAPTER 105: Configure Help Text

Since the EMS Desktop Client is the "backbone" for all editions of EMS, such as EMS Web App and EMS Kiosk, it enables you to customize the text that appears to users of those applications in your organization. This help text displays on various pages in EMS Web App, EMS Kiosk, EMS for Outlook, EMS Campus Planning Interface, and the EMS Floor Plans Utility. As the EMS administrator, you can configure this help text in EMS, or if you are assigned to an appropriate everyday user security template (which has administrator access), you can configure it directly in EMS Web App.

> **Note:**
> Depending on your organization, configuration in the EMS Desktop Client might need to be performed by a different type of System Administrator than configuration and text customization in the EMS Web App.

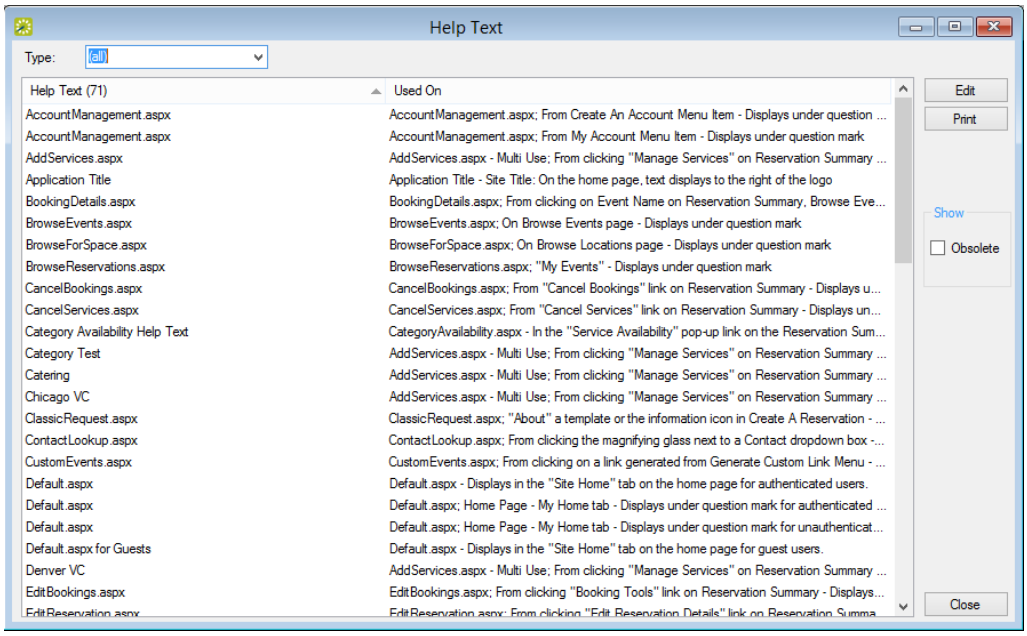
This topic will provide information that will allow you to do the following:

- Configure Help Text in the EMS Desktop Client
- Configure Help Text in the EMS Web App
  - Enable the Custom Help Text Feature
  - Navigate to Pages in EMS Web App and Customize Help Text

Configure Help Text in the EMS Desktop Client

To enable custom help text for the EMS Web App and/or the EMS Kiosk App, follow these steps in EMS Desktop Client:

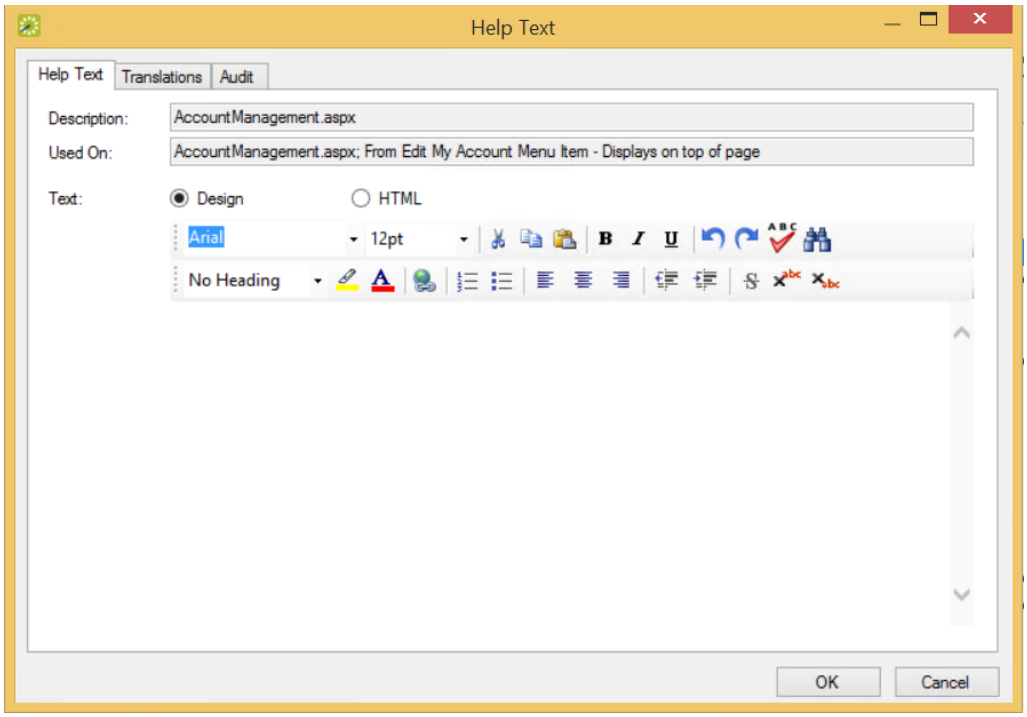
1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Help Text**. The Help Text window opens. This window lists the name or description for all types of Help Text that is currently in use in your EMS Web App and EMS Kiosk installations and the EMS Web App or EMS Kiosk page on which it appears. To filter for only a specific type of help text, select a type on the Type drop-down list.



Help Text Window

> **Note:**
> You can view all help text including the text not in use. Select **Obsolete**. Obsolete Help Text is displayed in red and italics in the Help Text window.

2. Select the Help Text that you are configuring, and then click **Edit**. The Help Text dialog box opens. The Help Text tab is the active tab. The tab contains options for entering and configuring the help text.



Help Text Tab

3. Configure the needed help 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 help 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 help text.
4. If translations have been defined for everyday user templates (see Configuring Language Translations), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the Help Text item.
5. Click OK. The Help Text dialog box closes. You return to the Help Text window with the newly configured Help Text item automatically selected in the window.

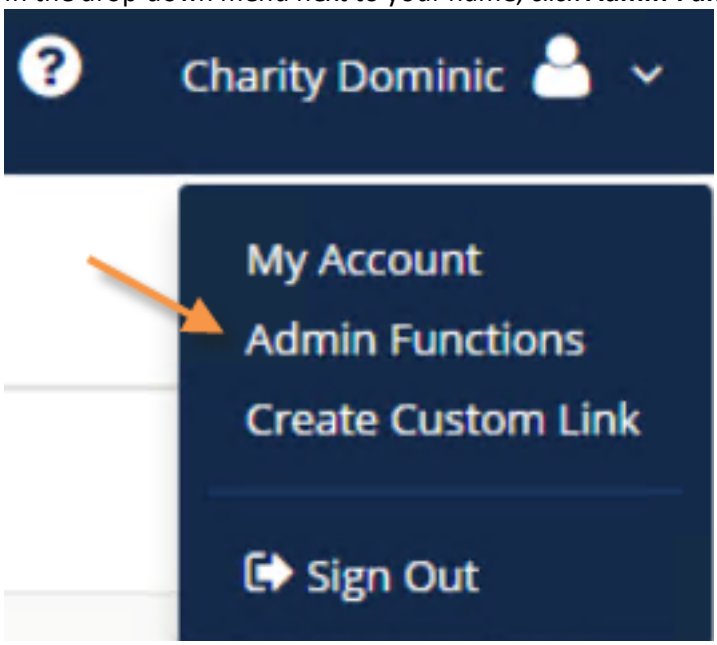
Configure Help Text in the EMS Web App

Once Help Text customization is enabled in the EMS Desktop Client, System Administrators in the EMS Web App can follow the instructions below to customize the applications help text. First, you enable the feature, then you navigate to each page in EMS Web App that you want to customize and enter help text.

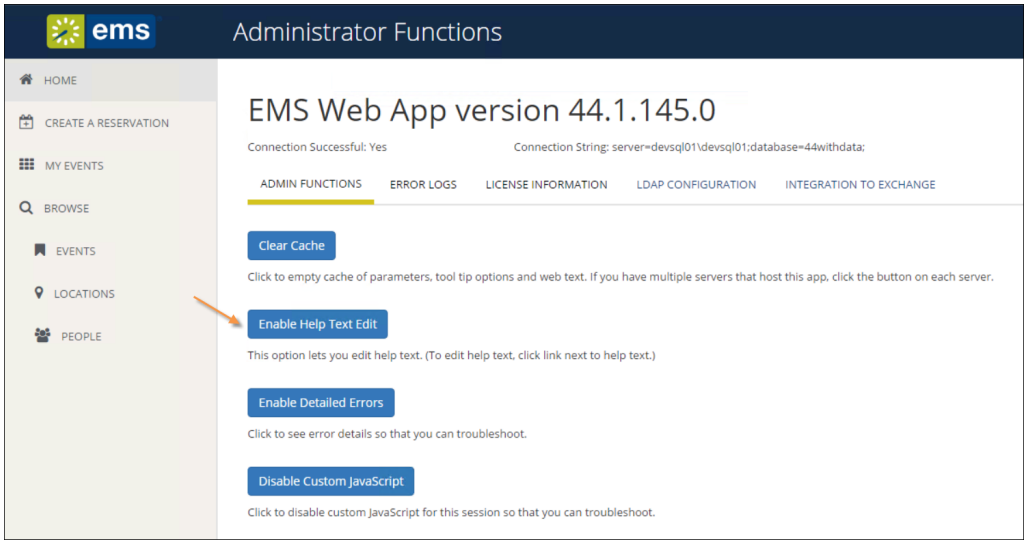
Enable the Custom Help Text Feature

To enable the custom help text feature, follow these steps:

1. Log in to EMS Web App.
2. In the drop-down menu next to your name, click **Admin Functions**.

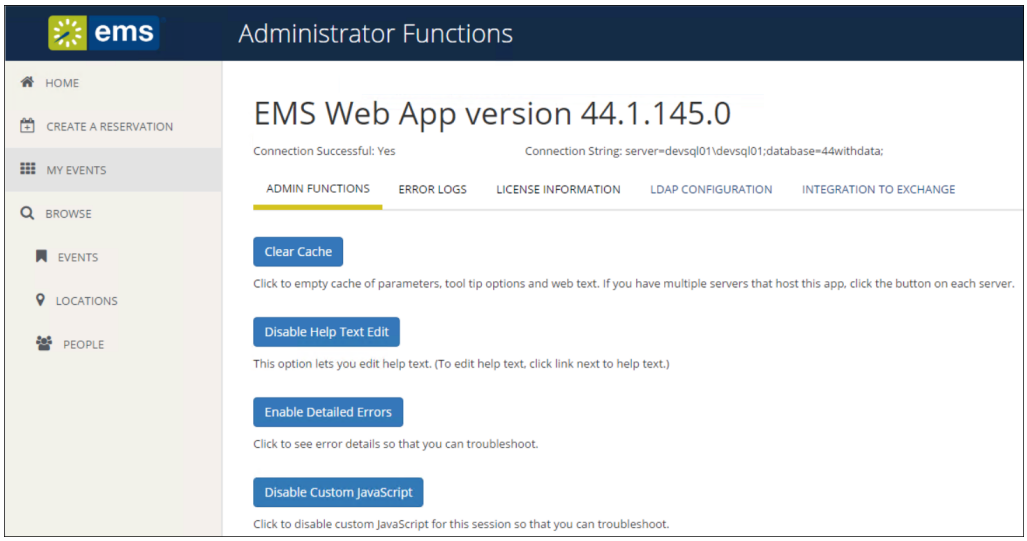


3. The EMS Web App Admin Function page opens.



Administrator Functions Page with Enable Help Text Edit Button Showing

4. Click **Enable Help Text Edit**. A confirmation message appears indicating that Help Text Mode is now enabled.

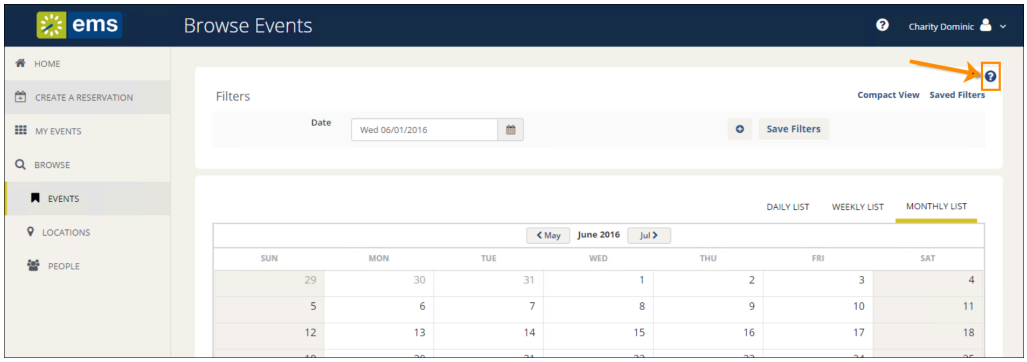


Administrator Functions Page with Disable Help Text Edit Button Showing

Navigate to Pages in EMS Web App and Customize Help Text

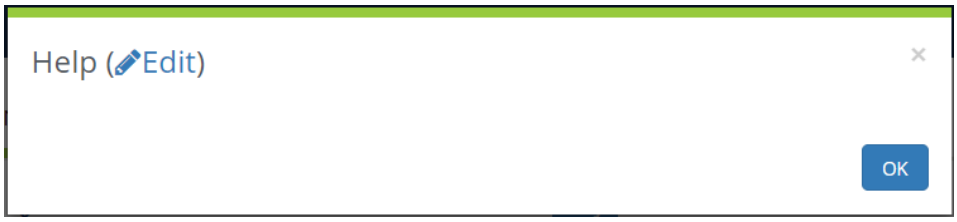
To navigate to pages in EMS Web App and customize help text on those pages, follow these steps:

1. Navigate to the EMS Web App page where you want to customize Help text. The Edit option is available in the upper right corner of the page.



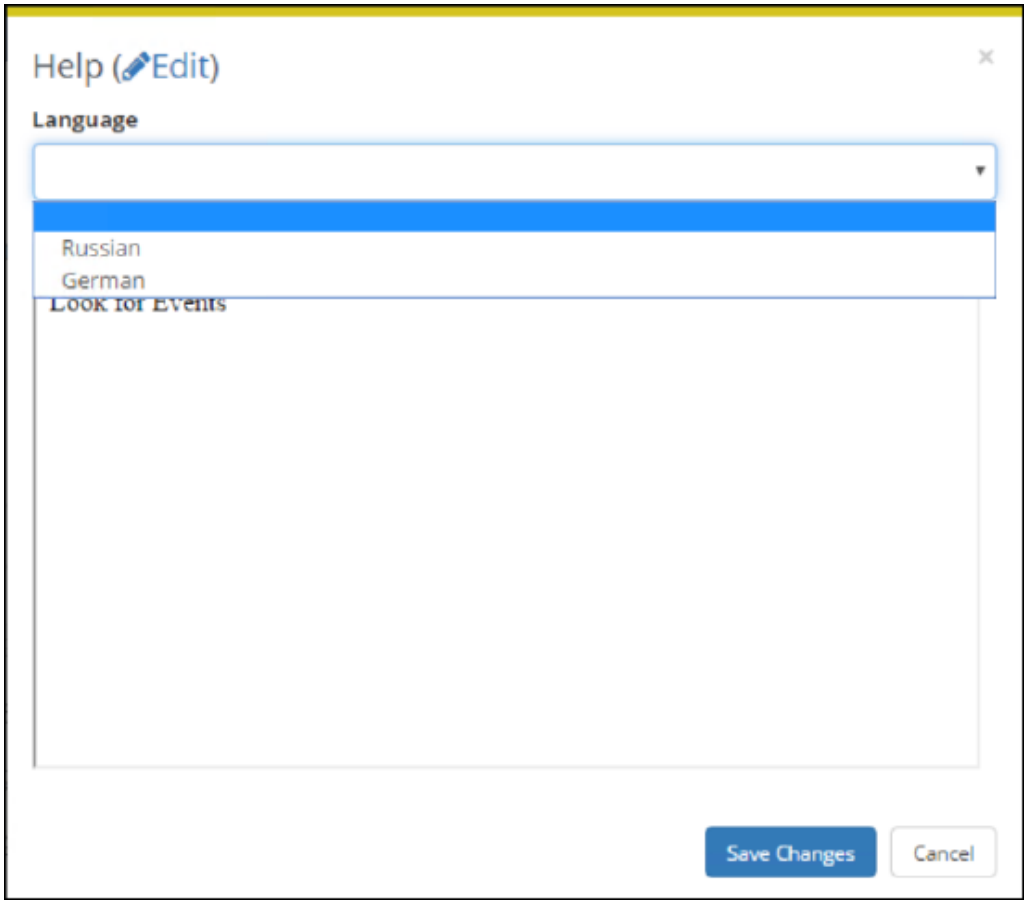
Edit Option Available in Upper, Right Corner

2. Click the option. An edit window launches where you can customize the Help text (click **Edit** to enter your custom help text).



Help Text Edit Window

3. If your help text should appear in another language, select a language option in the drop-down.



Language Field of Help Text Window (After Selecting Edit)

Note:
For options in the Language drop-down are controlled by another Administrator setting, see Language Translations.

4. After entering and configuring the Help text, click **Save Changes** to apply the text to the selected page.

CHAPTER 106: Configure Web Text

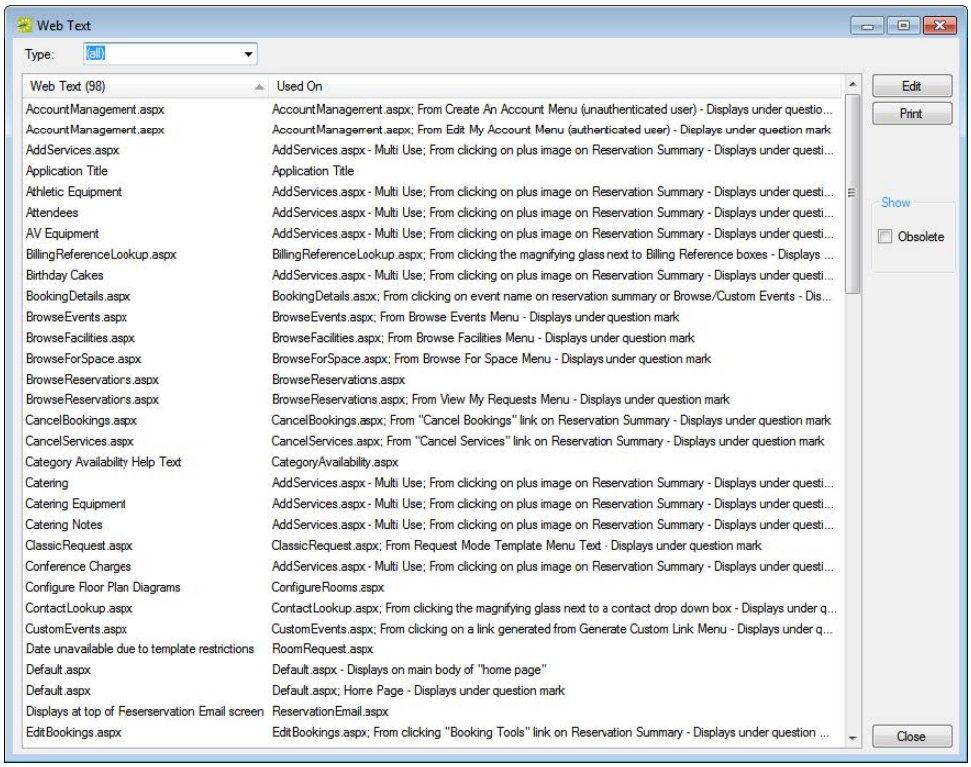
Web text is custom help text or policies and procedures that are specific to your organization that is displayed on various pages in EMS Web App and EMS Kiosk App. As the EMS Administrator, you can configure this web text in EMS, or if you are assigned to an appropriate Everyday User security template (one that has web administrator access), you can configure it directly in the EMS Web App.

See Also: Configure Help Text in the EMS Web App

Configure Web Text in EMS Desktop Client

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 EMS Web App and EMS Kiosk installations and the EMS Web App or EMS Kiosk page on which it appears.

> **Note:**
> To show only a specific type of web text, select a type on the Type drop-down list. 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.



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.
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 Also:** Configure Language Translations), 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.

CHAPTER 107: Configure Language Translations

> **Note:**
> Previous versions of EMS Desktop Client referred to this feature as "Web Cultures."

If you need to add language translation capability for your Everyday User templates or EMS Kiosk pages (menu text, menu items, and help text items), then you must configure language translations.
Each translation you configure represents a language for which translations must be provided in your EMS Everyday User Applications.

This topic will provide you with the following information:

- Build Your Language Translation Spreadsheet
- Configure Your Language Translations in EMS Desktop Client

Build Your Language Translation Spreadsheet

To build your language translation spreadsheet, follow these steps:

1. EMS Software provides a Microsoft® Excel spreadsheet specific to EMS Web App that contains all of the application labels, page titles, system messages and error messages with their English translations.

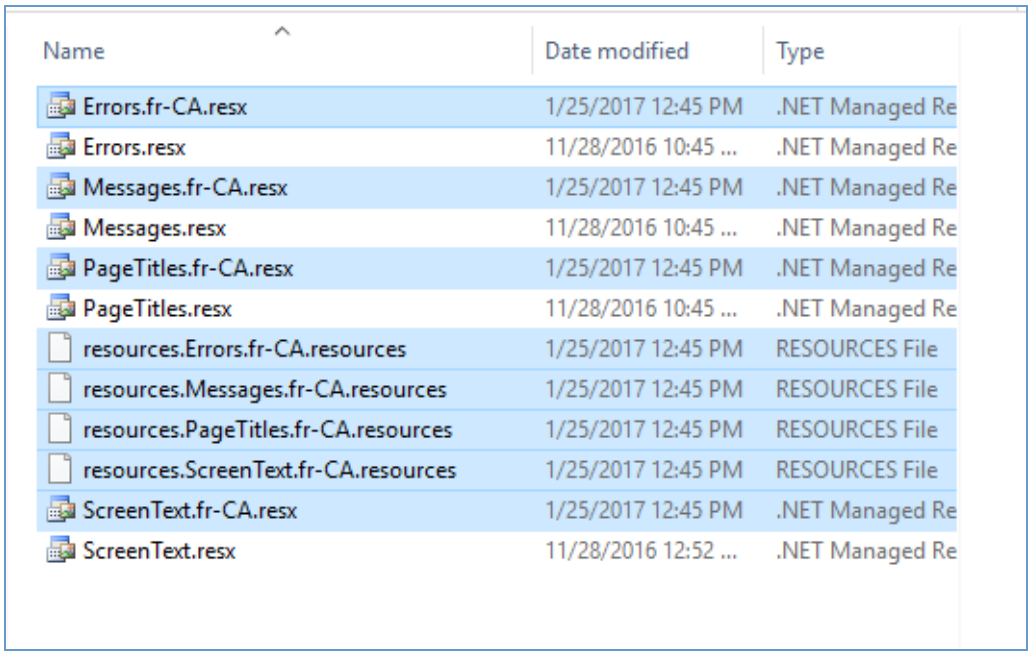
> **Note:**
> Values for data items (for example, Event Types like “Meeting” and “Training” or Room Types like “Workspace” and “Conference Room") configured within EMS or dynamic information that is inputted by an EMS user or Virtual EMS web user (for example, Event Name like “HR Meeting," and Comments or Special Instructions) are not translated.

2. The customer is responsible for providing the translated values for the information in the product spreadsheet. Once the customer returns the fully translated product spreadsheet to EMS Software, EMS Software development teams compile the spreadsheet into a product-specific language folder containing a set of files. (We maintain a language folder for each language).
3. The customer saves the language files in the "App_GlobalResources" folder within the EMS Web App physical directory on their web server. (The default path is C:\inetpub\wwwroot\emswebapp\App_GlobalResources\).

Important!

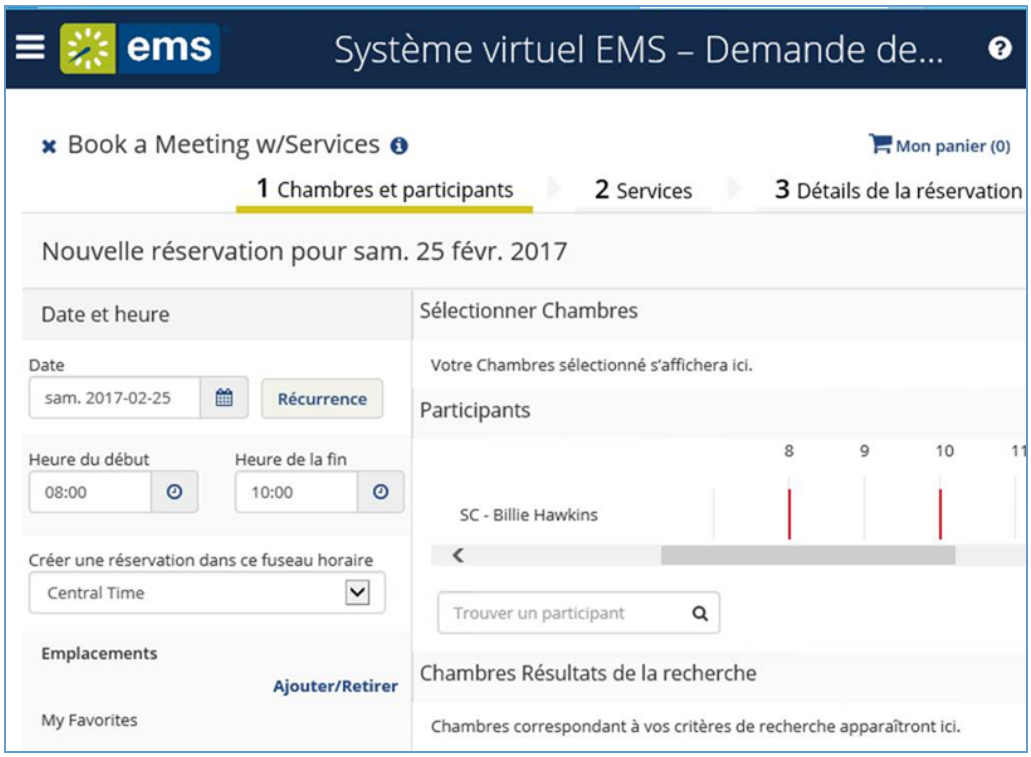
For the translation to affect an Everyday Applications user, two conditions should be met:

- The language setting should be set in Windows
- The end user's browser Language Preference is set to that specific language and set as the default.



Name	Date modified	Type
Errors.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
Errors.resx	11/28/2016 10:45 ...	.NET Managed Re
Messages.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
Messages.resx	11/28/2016 10:45 ...	.NET Managed Re
PageTitles.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
PageTitles.resx	11/28/2016 10:45 ...	.NET Managed Re
resources.Errors.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.Messages.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.PageTitles.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.ScreenText.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
ScreenText.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
ScreenText.resx	11/28/2016 12:52 ...	.NET Managed Re

Example of a Successful Installation

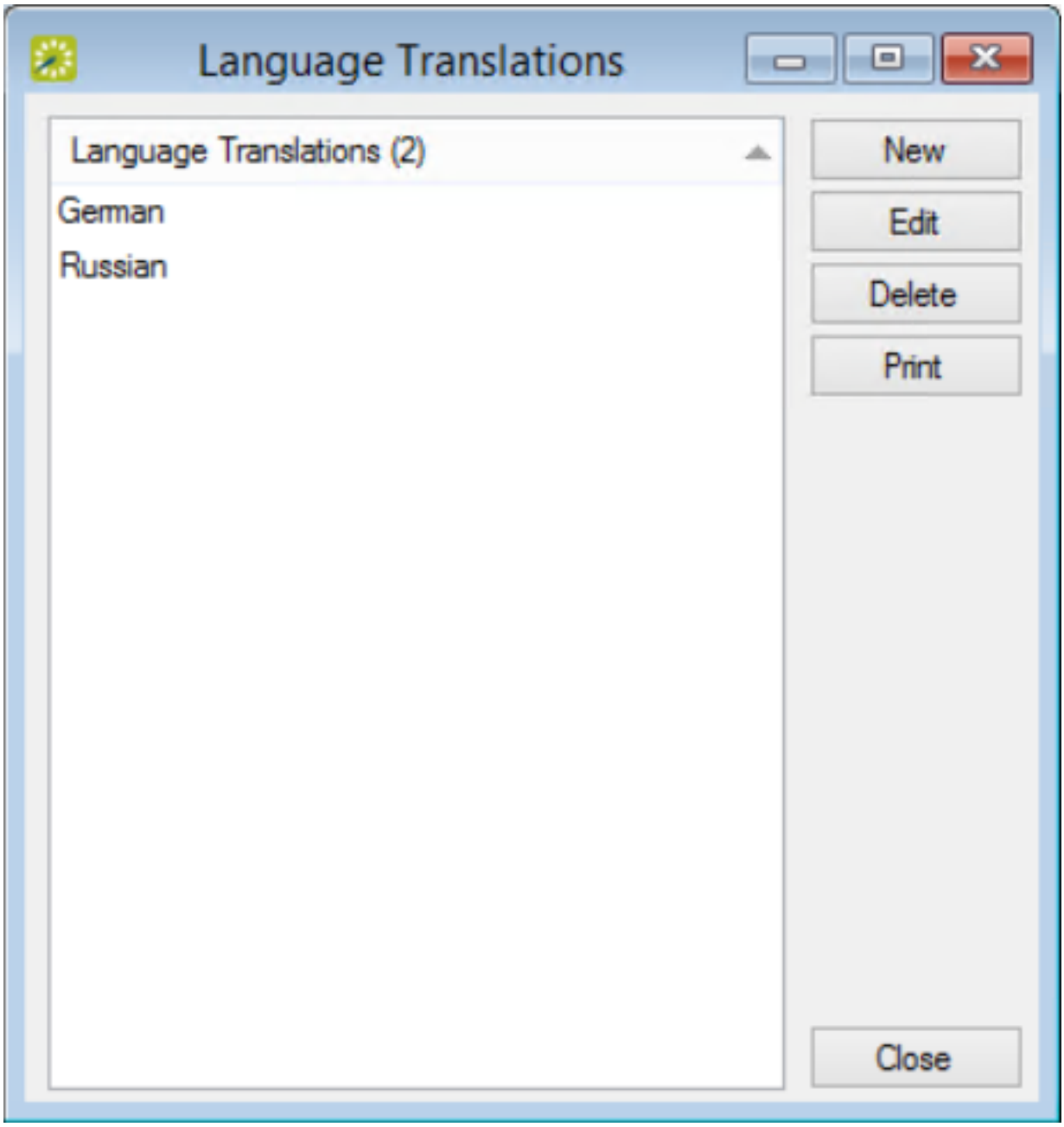


French-Canadian Example

Configure Your Language Translations in EMS Desktop Client

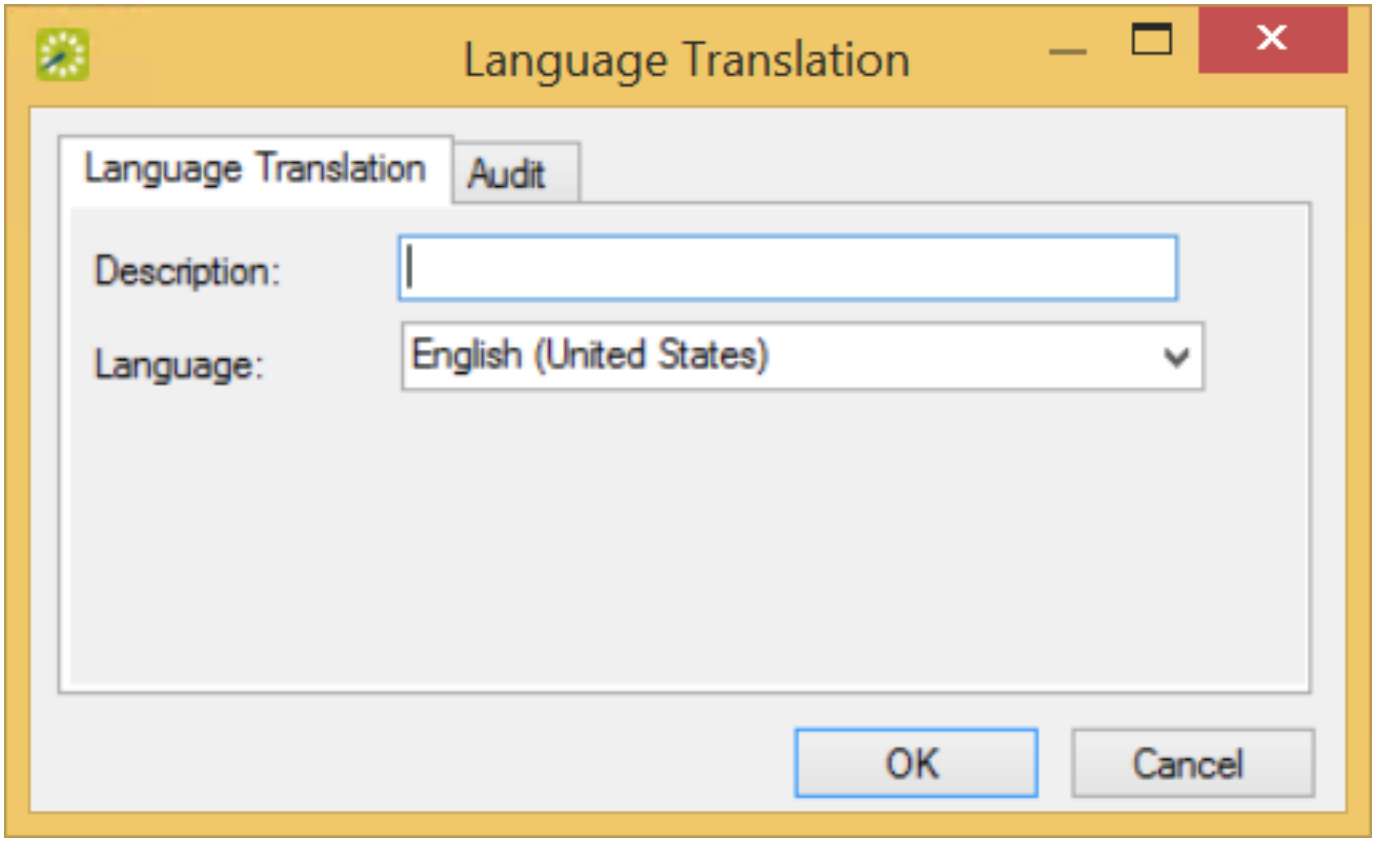
To configure your language translations in EMS Desktop Client, follow these steps:

1. On the EMS Desktop Client menu bar, click **Configuration** > **Everyday User Applications** > **Language Translations**. The Language Translations window opens, listing all the translations that are currently configured in your EMS database.



Language Translations Window

2. Click **New**. The Language Translation dialog box opens. By default, the language is set to English (United States).



Language Translation Dialog Box

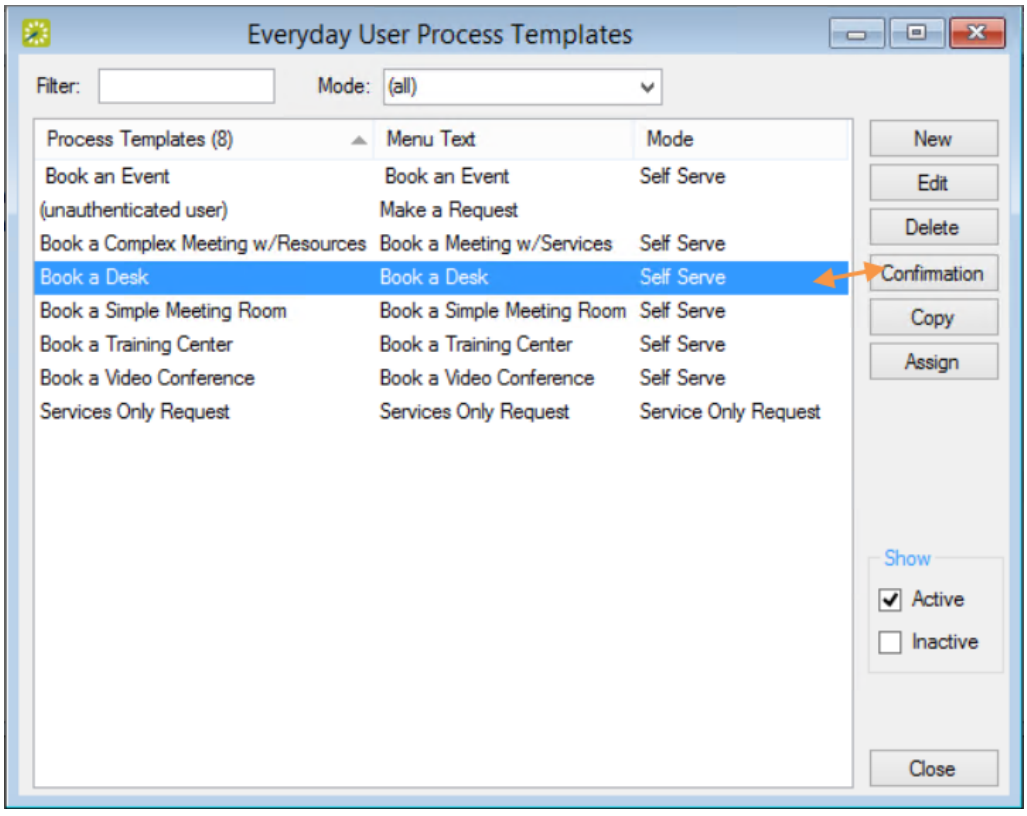
3. In the Description field, enter a name or description for the new web culture (up to 50 characters, including spaces).
4. On the Language drop-down list, select the language into which the menu text, menu items, and help text items will be translated.
5. Click **OK**. The Language Translation dialog box closes, returning you to the Language Translations window with the newly configured translations automatically selected. After you configure a language translation, it is displayed on the **Translations** tab in various configuration areas in EMS.

CHAPTER 108: Configure Confirmation Behavior for Everyday User Applications

When working with Everyday User Process Templates, you can set automated confirmations that generate when Everyday Users initiate reservations or bookings with specific templates. For example, you might want Everyday Users to always receive an email to confirm that a request for a room has been received and will be processed.

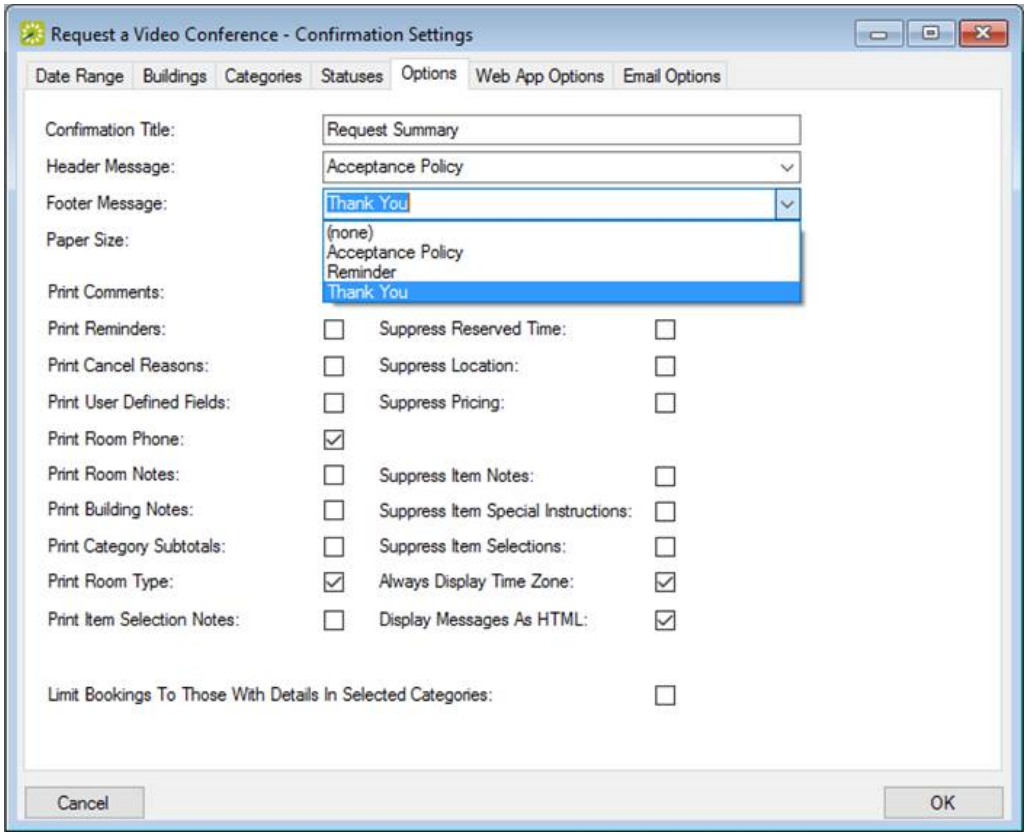
To configure confirmation behavior for everyday user applications, follow these steps:

1. To customize the behavior of this type of confirmation, from the Everyday User Process Templates window, select the template for which you want to customize a confirmation.
2. Click **Confirmation**.

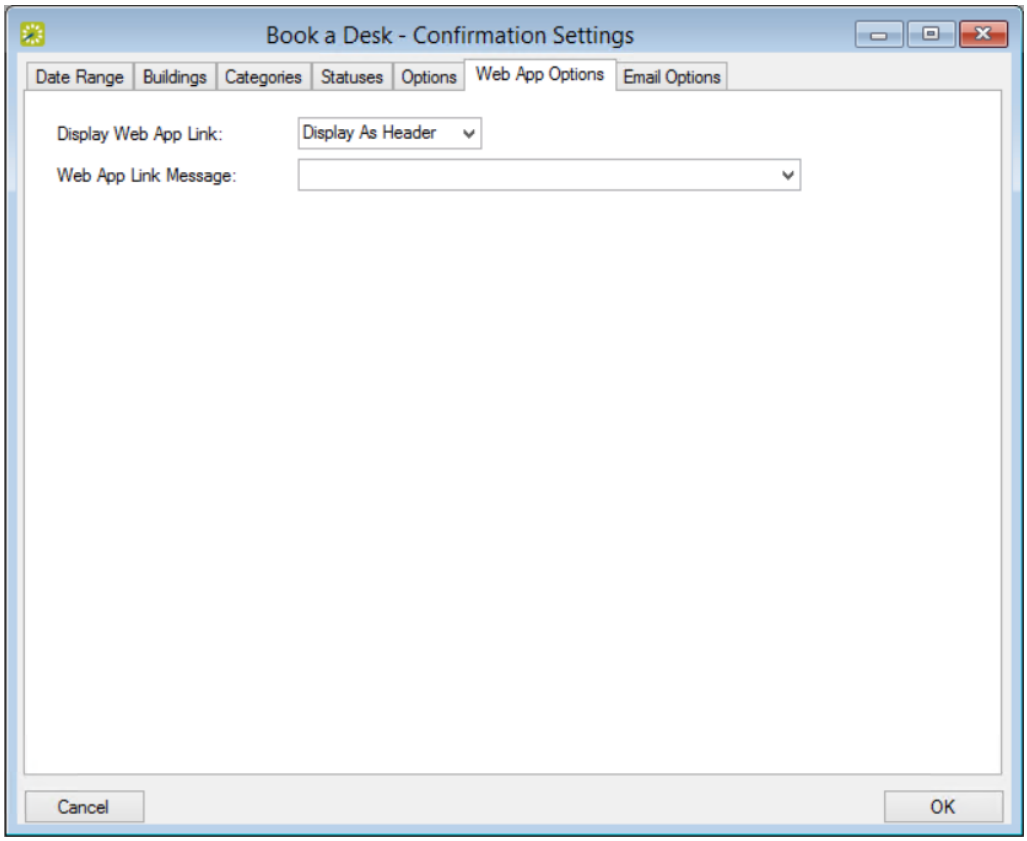


3. When the Confirmation Settings window appears for the template, click through the tabs and specify your confirmation settings.

4. Use the **Options** tab to set an email header and email footer for pre-configured messages (which you set under **Configuration** > **Other** > **Messages**).



5. Use the **Web App Options** tab to specify if and where a URL to the Web App should be included in the confirmation. You can also provide a Message to include with the URL in the confirmation. (See Also: Configure Confirmation Emails).



Option	Description
Display Web App Link	Indicate whether a URL to the Web App will display in the confirmation as a Header, Footer, or at all.
Web App Link Message	Indicate which Message, if any, to include with the URL to the Web App in the confirmation.

Note:
To see how a user in EMS Desktop Client encounters these confirmations, see Confirmations.

CHAPTER 109: Create Templates for Desks and Workspaces

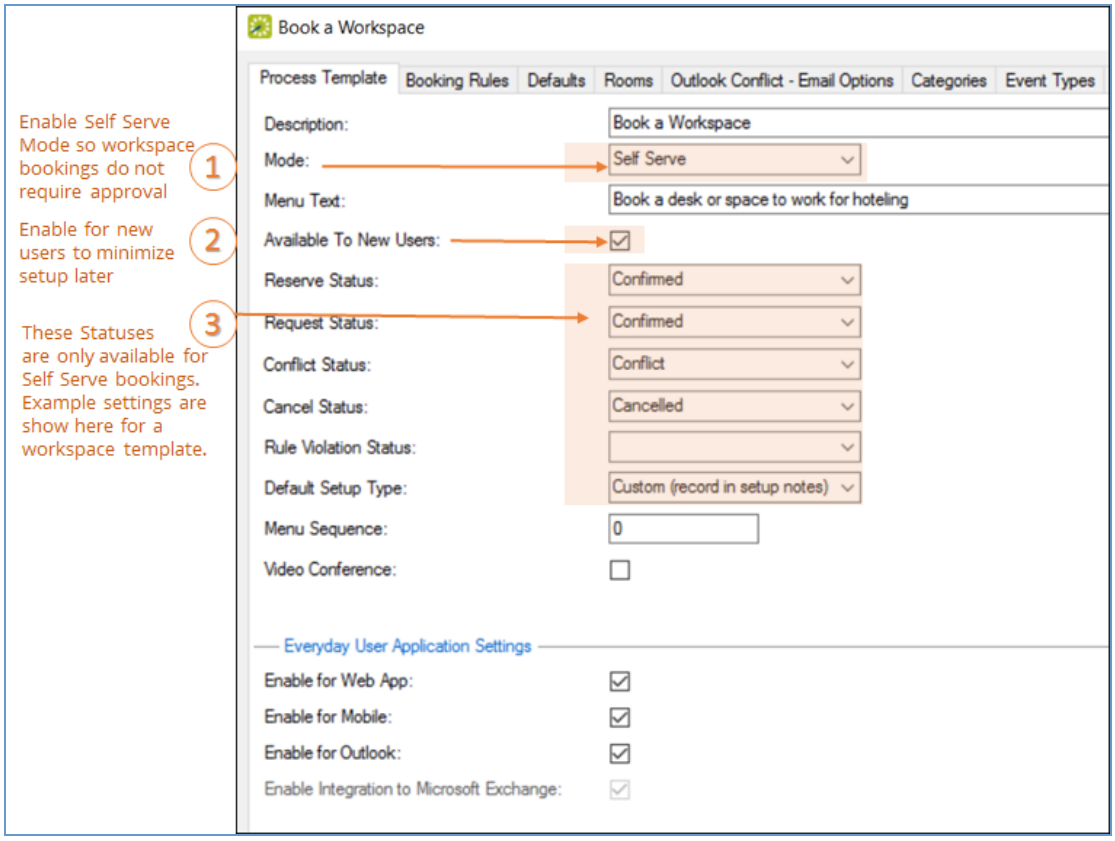
To create booking templates for "hoteling" (desks and workspaces), you need complete the following:

- Configure Spaces
- Configure Templates
- Enable those templates for specific types of users

1. To begin configuring facilities for your organization, configure the following elements of space as needed:
   - Setup Types
   - Rooms
   - Room Types
   - Areas
   - Public Views
   - Features

   Note:
   Consider using a naming convention or Configure Areas that groups workspaces and desks together in lists so they are easier to find during the configuration and booking processes.

2. Once you have set up space, you can establish special booking templates for hoteling. Follow the workflow for building an Everyday User template. An example of this setup screen is shown here:



See Also: Everyday User Process Template Field Definitions.

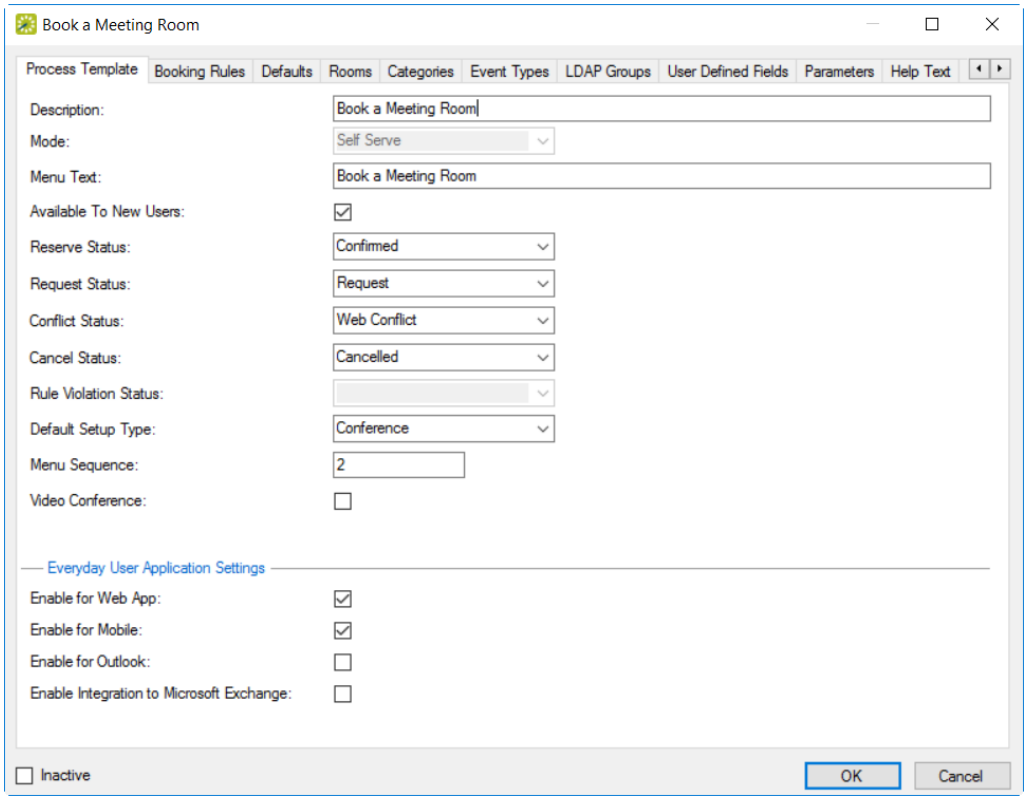
3. Enable the template for your users in the Everyday User Application Settings section:
   - Select Enable for Web App to enable the template on EMS Web App.
   - Select Enable for Mobile to enable the template for both the EMS Mobile App and the mobile version of EMS Web App.
   - Select Enable for Outlook to enable the template for the optional EMS for Outlook add-in, which can override booking rules such that users can book a room that is in conflict. For this situation, you can also configure a system-generated email to be sent to the user if any rooms are not available for dates booked. An additional tab becomes available if you create a template with the option enabled, Outlook Conflict Email.
   - Select Enable Integration to Microsoft Exchange to enable the template for Microsoft® Exchange when your organization does not use EMS for Outlook.
4. Browse through additional tabs as needed on the template configuration page to add further customizations, such as Booking Rules, Defaults, Rooms, and Event Types. Then click **OK** to save your new template. Authorized users will see this option when they begin the booking process.

CHAPTER 110: Everyday User Process Template Field Definitions

This topic provides information on the following:

- Process Template Tab
- Additional Tabs for Booking Template Configuration
  - Booking Rules Tab
    - Booking Rules Tab: Booking Requirements Area
    - Booking Rules Tab: Booking Days Area
- Defaults Tab
- Video Conference Tab
- Rooms Tab
- Categories Tab
- Event Types Tab
- LDAP Groups Tab
- User Defined Fields Tab
- Parameters Tab
- Help Text Tab
  - Menu Text Translations Tab
  - Terms and Conditions Tab

Process Template Tab



Field	Description
Description	Read-only information.
Mode	Determines how a user can make a reservation in EMS Web App. **Request**—users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not allow the user to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS Desktop Client user. The room does not show as Reserved until this step has occurred. **Note:** The "Request" mode is only for guest users. If you are upgrading to EMS V44 from an older version, any roles that were defined in Request mode will be set to inactive. **Self Serve**—Registered users can see real-time room availability (in list or grid views).

Field	Description
	Note: If users require video conferencing, you must choose this option. **Service Only Request—**Allows users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS.
Menu Text	The menu text or link that a EMS Web App user sees when requesting a room using this everyday user process template.
Available to New Users	Select this option if this everyday user process template is to be automatically assigned to newly registered users.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reservable' 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.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by 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 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 booking 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 user who is attached to this template is reserving a room in EMS Web App. The user can always select a different value.
Allow user Personalization	Select this option if users must be able to use the Options feature to customize their settings on EMS Web App 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

Field	Description
	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 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 everyday user process template, the Self Serve Mode must be selected for the template.
Enable for Web App	Select this option if this process template should be available on EMS Web App.
Enable for Mobile	Select this option if this everyday user process template is to be available (in an appropriate format) on a mobile device browser.
Enable for Outlook	Enables the everyday user process template for use with the EMS for Outlook module.
Enable Integration to Microsoft Exchange	Enables the integration of templates with your organization's Exchange server (typically, when your organization does not use EMS for Outlook. Enabled only if your organization has purchased the optional Integration to Microsoft Exchange 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 user can choose a date and time that is convenient for all attendees and then send invitations through EMS Web App, which attendees receive and can manage through Outlook.

Additional Tabs for Booking Template Configuration

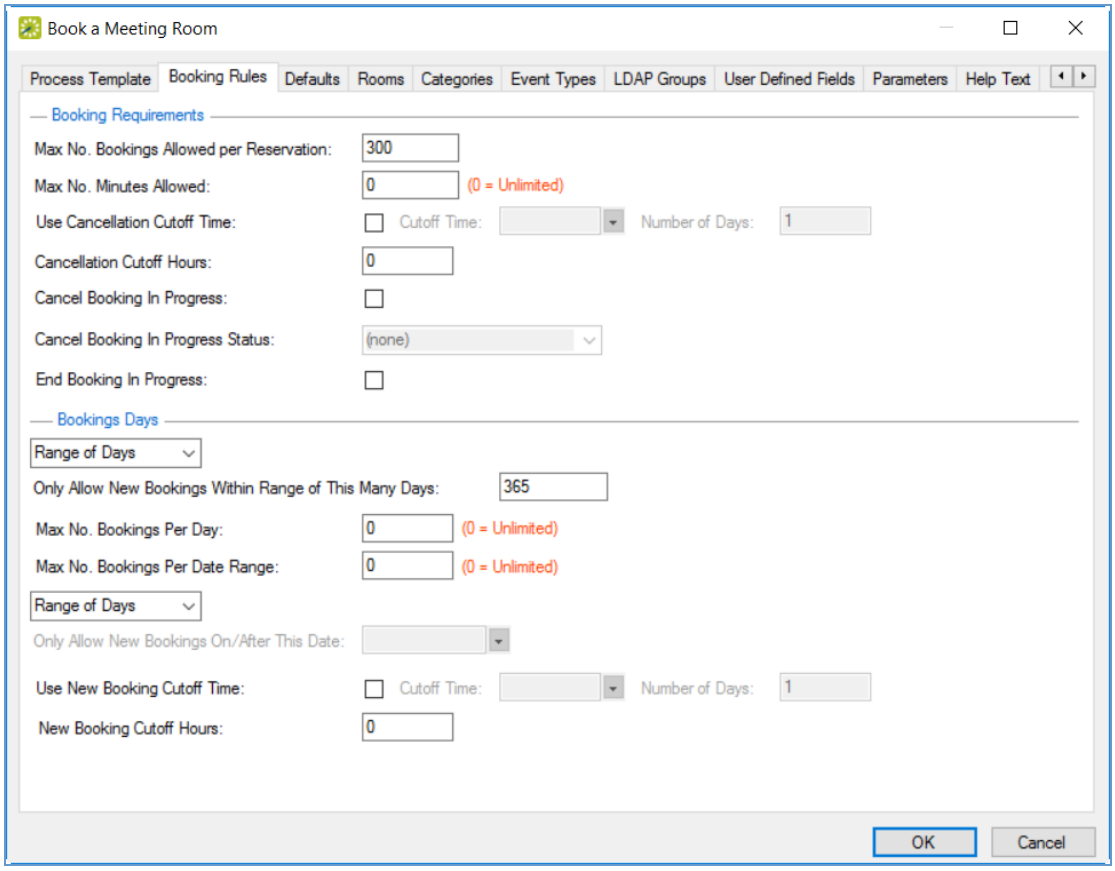
This section provides a conceptual overview of the additional tabs on the Booking Template Configuration page.

Booking Rules Tab

You can use the Booking Rules tab to control very specific timing on how users can book, cancel, or end events.

The Booking Rules tab contains two areas:

- Booking Requirements Area
- Booking Days Area



Booking Rules Tab

Booking Rules Tab: Booking Requirements Area

Field	Description
Max. No. Bookings Allowed Per Reservation	Maximum number of bookings that a new reservation can contain.
Max. No. Minutes Allowed	Maximum number of minutes for which a new reservation can be created (not enforced when a user edits a booking).
Use Cancellation Cutoff Time	Whether the booking has a cutoff when cancellations can no longer be made. **Cutoff Time** and **Number of Days** control how far in advance the cutoff is set. 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.
Cancellation Cutoff Hours	The number of hours before an event when cancellations can be made. 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. If using this setting, clear the Use Cancellation Cutoff Time field.
Cancel Booking in Progress	Allows users to cancel events in progress. If selected, the **Cancel Booking in Progress Status** option is enabled. Use this field to specify a status to display on this type of cancellation (configured separately). See Configure Statuses.
Cancel Booking in Progress Status	Sets the status for bookings that are canceled when in progress.
End Booking in Progress	Allows users to end in-progress bookings early, which makes the space available to other users.

Booking Rules Tab: Booking Days Area

You can use the Booking Days area to indicate how far into the future bookings can be made and how much lead time is required to make a booking.

Fields change depending on your initial **selections in Range of Days** and **Specific Date**. The second dropdown menu sets the lead time requirement and you must select a date in the **Only Allow New Bookings After This Date** field.

Field	Description
Specific Date	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.
	Only allow new bookings within Range of this Many Days—Set a date in this field if you want bookings to only be allowed after this date.
	Use New Booking Cutoff Time—Enter the cutoff time and number of days at which point you want to require the Everyday User to submit bookings by that time and number of days.
	New Booking Cutoff Hours—Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.
Range of Days	Selecting this option from the first dropdown means the user will only be allowed to make bookings within a range of days. You must also specify a value for **Only Allow New Bookings within Range of This Many Days**, and you must also indicate a cutoff time or cutoff hours as you did for cancellations
	Only allow new bookings within Range of this Many Days – Set a number in this field to allow bookings within the number of the days specified (e.g.: 365 would allow an everyday user to create bookings within 365 days).
	Max No. Bookings Per Day—Number of bookings allowed within 24-hour period.
	Max No. Bookings Per Date Range—Number of bookings allowed within Range of Days.
	New Booking Cutoff Hours—Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.

Defaults Tab

You can use this tab to set the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone to automatically populate the Room Requests page when users make reservations; users can edit them as needed.

Event Type and Building values are pre-configured.

See Also: Configure Event Types, Configure Buildings, and Set Default Start and End Times.

Video Conference Tab

You can use this tab to control how users can make video conferencing reservations. This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the everyday template tab.

For information on how to configure the information on this tab correctly so that assigned users make video conferencing reservations, see Video Conferencing.

Rooms Tab

This tab enables you to associate the everyday template with specific space. To begin, specify Building (all buildings, a specific building, an area, or a view) and Room Type search criteria. These are pre-configured.

See Also:

- Configuring Buildings
- Configuring Areas
- Configuring Public Views
- Configuring Rooms and Configuring Room Types

You can move one or more rooms (CTRL-click) from the Available list to the Request or Reserve panes for this template. This controls the space that users assigned to this everyday template can book.

- Reserve pane: rooms that can be reserved without approval (booked in the Reserve Status on the everyday template tab).
- Request pane: rooms that require approval (booked in the Request Status on the everyday template tab).

Categories Tab

This tab enables you to set the pre-configured categories of services that users assigned to the template can add to their bookings by moving them from the Available list to the Selected list. These are pre-configured. See Configuring Categories.

Note:
If your Administrator has configured an "Attendee" type category, and assigned it to the booking template, users can invite or remove attendees on the Services page.

Event Types Tab

This tab enables you to set which event types users of this template can choose from during the booking process by moving them from the Available list to the Selected list, or to the Available To All everyday process Templates list.

LDAP Groups Tab

You use this tab to assign Everyday User process templates to users based on LDAP Groups that are defined in your directory service, for example, Active Directory. Everyday user process templates that are

assigned via LDAP do not need to be explicitly assigned to user records. When users log in, they "inherit" the everyday user process templates based on the LDAP groups to which they belong. To assign the one or more LDAP group, select and move them from the Available list to the Selected list. See Also: LDAP Authentication.

User Defined Fields Tab

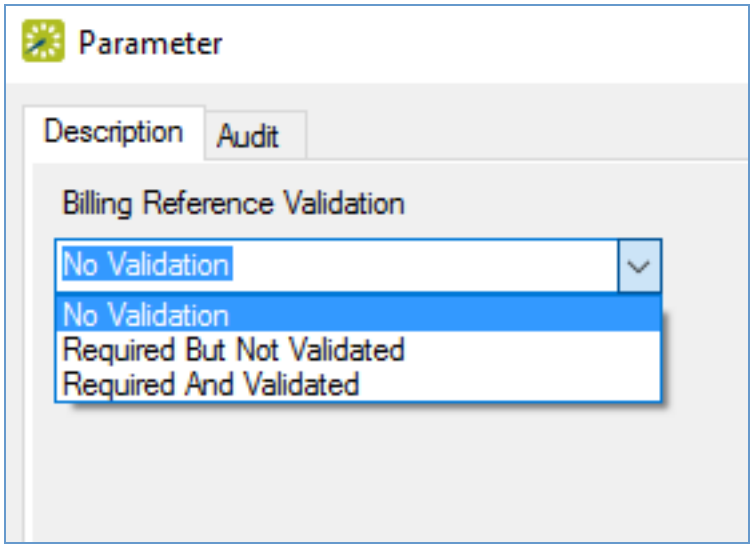
You can use this tab to control the behavior of your implementation's customized fields for this template by moving one or more from the Available pane to the Required or Optional panes. These fields are pre-configured. See Also: Configuring User Defined Fields (UDFs).

Parameters Tab

This tab enables you to control how this everyday user process template is affected by parameter settings.

- 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**.

> **Note:**
> The billing parameter, Billing Reference Validation, includes a special option that affects whether users are prompted to enter billing and PO information and whether they are validated.



Users will see the Billing Reference field during the booking process parameters are set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the

Admin decides whether to display the field, user entries will be validated based on the value in the "Billing Reference Validation" parameter set (above) on the template.

Billing Reference field options:

- Show (Prompt)
- Require
- Validate (Show and Require)
- Don't Show

Additionally, the Billing Reference Validation parameter will always determine whether it is optional, required, or required and validated.

See Also:

- Configuring Rooms
- Configuring Categories
- Configuring Field Behavior for Billing Reference and PO Numbers

Help Text Tab

This tab enables you to control the help text that displays to users when they are using this template. By default, help text items inherit their settings from the global Help Text list. (See Configuring Help Text.) You can use the list of help text items on the Help Text tab to override the settings for this particular template if needed.

- To edit the value for a help 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**.

Menu Text Translations Tab

This tab enables you to control how your EMS Web App translations appear to users of this template. You only need to provide information on this tab if a foreign language translation has been defined for everyday templates. See Configuring Language Translations. For each translation shown here, you can click in the **Text** field and enter the appropriate translation for the menu text (the menu text or link that an EMS Web App user sees when requesting a room using this everyday user process template).

Terms and Conditions Tab

You can use this tab to set your template to require that its users agree to special Terms and Conditions before submitting reservations. In the text area, you can create a Terms and Conditions message that presents when a user selects a room.

- Design (selected by default) means you use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on).

- HTML means you use HTML code to format the message (spacing, number of lines, capitalization, and so on) to format your Terms and Conditions.

CHAPTER 111: How Do I Allow Invitations on a Booking Template?

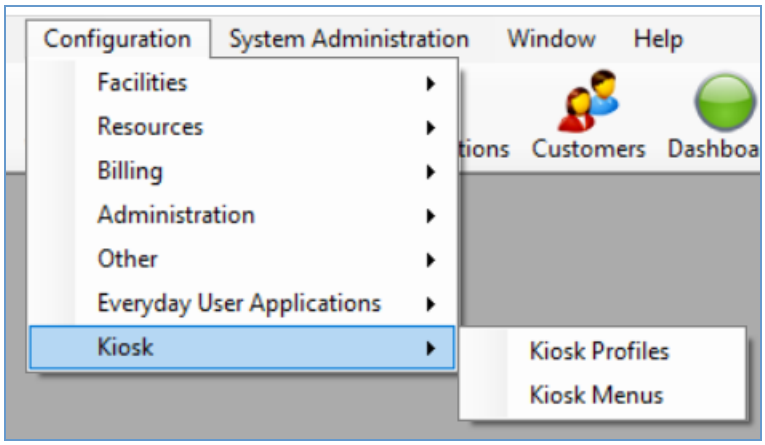
For information on allowing invitations on a booking template, see the following topics:

- Configure booking templates
- Learn about the Allow Invitations checkbox

CHAPTER 112: Configuration > Kiosk

The EMS Kiosk is a powerful yet easy-to-use digital room sign and interactive tool for reviewing room availability, booking space, searching for a meeting location and more. Mount the unit outside a room and/or make an EMS Kiosk available in a lobby or entryway.

You can access the Kiosk configuration settings under **Configuration** > **Kiosk**.



The following topics provide instructions on configuring Kiosk elements for EMS "Everyday User" applications:

- Configure Kiosk Profiles
- Configure Kiosk Menus

CHAPTER 113: Configure EMS Kiosk App Profiles

When you configure the EMS Kiosk App on a specific touch-screen device, a Kiosk profile controls the functionality that will be available on the device. You configure an EMS Kiosk profile through the EMS Desktop Client.

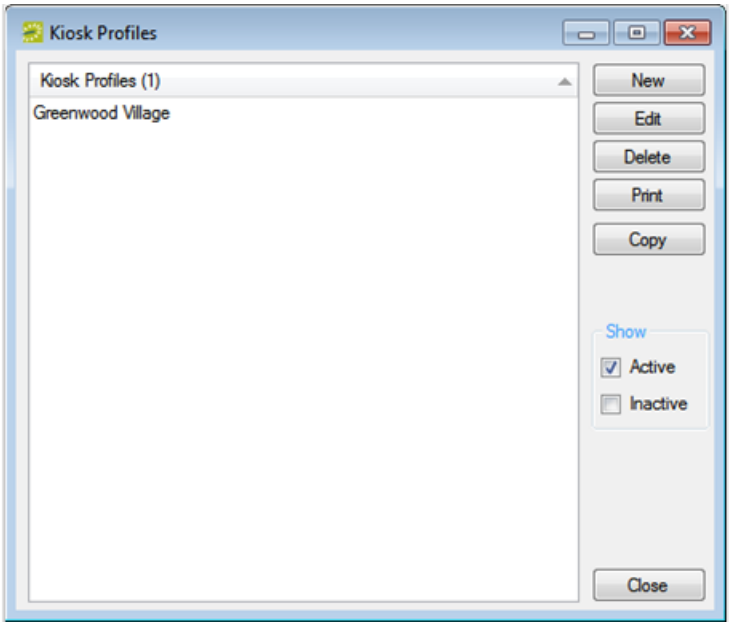
You can set parameters and default language translations and floor plans at the Global level (these set defaults for all Profiles) or for just one Kiosk Profile (on the tabs below). This topic guides you in configuring one Kiosk Profile.

To configure an EMS Kiosk Profile, you will:

- Navigate to the Kiosk Profiles area.
- Create a new EMS Kiosk Profile.
- Configure how Rooms, Menu Items, Translations, Images, and Help Text display on Kiosks that have this profile.
- Set parameters (as needed) for this profile.

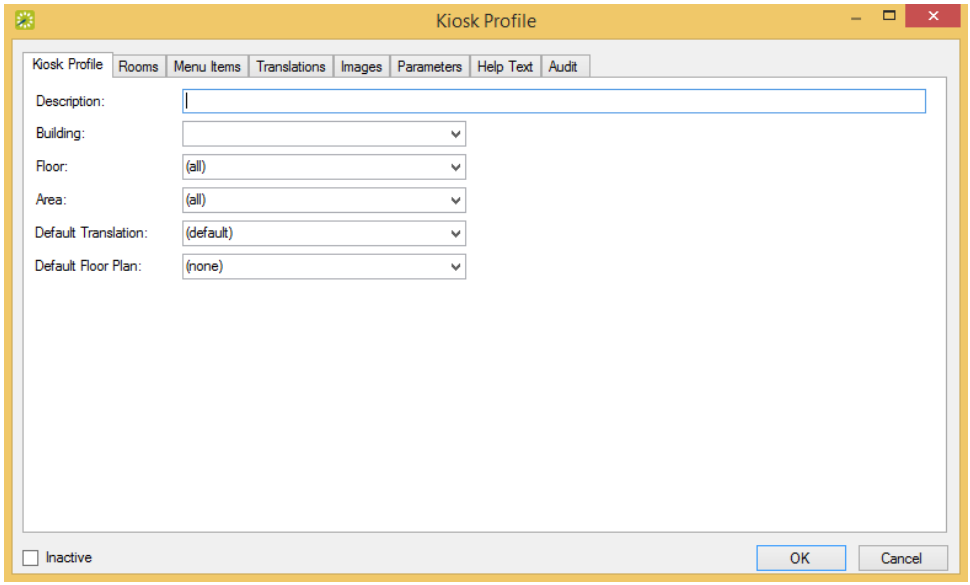
Navigate to the Kiosk Profiles Area

1. From the EMS Desktop Client menu bar, click **Configuration** > **Kiosk** > **Kiosk Profiles**. The Kiosk Profiles window opens, listing all active Kiosk Profiles.



Kiosk Profile Window

2. Click **New**. The Kiosk Profile dialog box opens. The **Kiosk Profile** tab is the active tab.



Kiosk Profile

3. Enter the information for the new profile on the **Kiosk Profile** tab.

Kiosk Profile Tab

Fields on the **Kiosk Profile** tab are described below.

Option	Description
Description	The name or description for the Kiosk profile (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 App 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 Help Text are displayed on a Kiosk page. If you leave this field set to "(default)", then this Kiosk Profile will inherit the language setting in EMS Kiosk global parameters (and if these are not specified, the default language is US English). In order to set a default language for this

Option	Description
	Kiosk Profile, you will need to first add one or more languages on the Translations tab; then you can select a language on this dropdown to be the language in which the Kiosk automatically displays. If you add multiple languages on the **Translations** tab for users to choose from, your selection in this field sets the default to display unless they choose another language. **Note:** If the language you want is not available in this dropdown field, then the translation must be defined globally for EMS Desktop Client (see Configure Language Translations). Global parameters can be accessed under **System Administration** > **Settings** > **System Parameters**. Additionally, in order to make alternate languages available on your kiosks, you must enable the Language Selection menu for EMS Kiosk App.
Default Floor Plan	Select the default floor plan that is to be displayed for the current day's events in the selected **Building** (above). **Note:** This is an add-on feature that is only available if floor plans have been configured using the optional EMS Floor Plans utility.
Inactive	Leave this option blank to keep the profile active. Select this option to inactivate the profile.

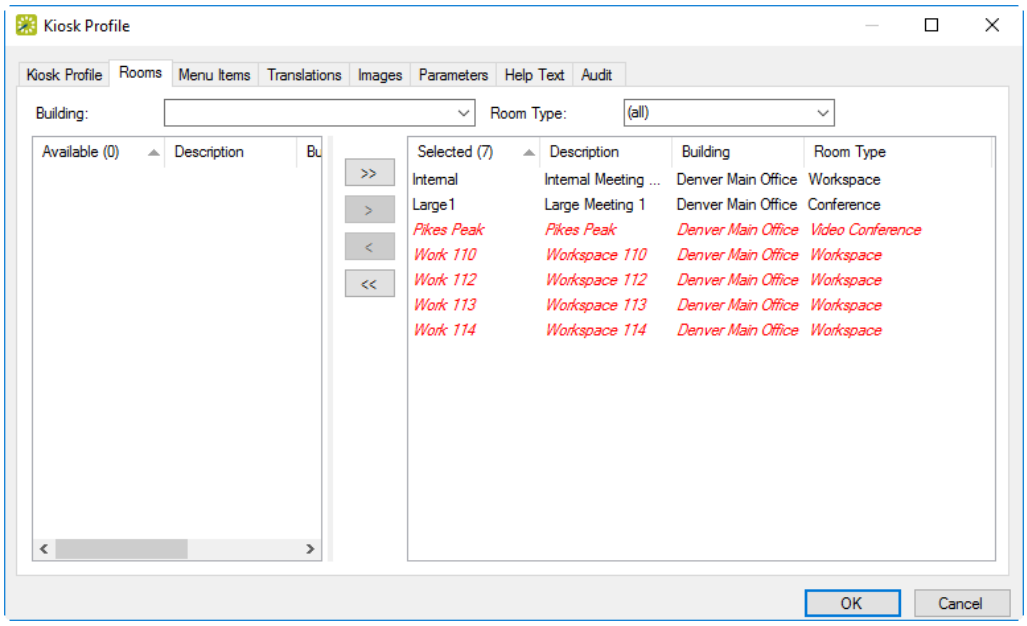
Continue with any other configuration tabs (below) for the profile as needed:

- Rooms Tab
- Menu Items Tab
- Translations Tab
- Images Tab
- Parameters Tab
- Help Text Tab

> **Note:**
> On any tabs in this configuration, you can click **OK** to save your changes and close the Kiosk Profile dialog box. Your newly configured profile will then be listed in the list of Kiosk Profiles.

Rooms Tab

Rooms selected in the **Rooms** tab will appear under Today's Events, and users can reserve them from the Make Reservations page.



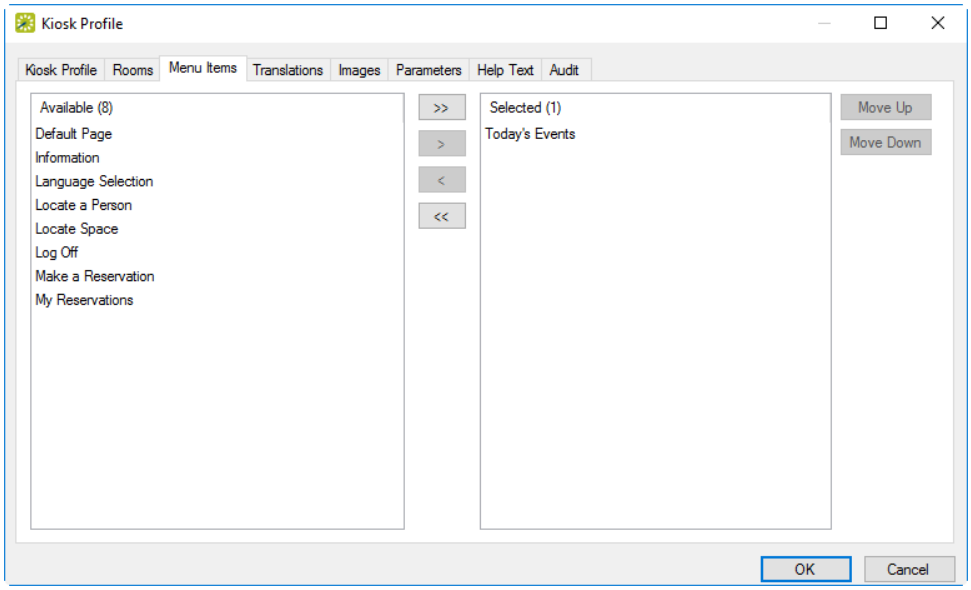
Rooms Tab

1. On the Building drop-down list, select the applicable building.
2. On the Room Type drop-down 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.

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 App. Menus are displayed as buttons at the top of EMS Kiosk App pages.

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.
2. Click the **Move** (**>**) button to move the selected items to the Selected list.
3. Click **OK**.



Menu Items Tab

Translations Tab

A translation is the language in which the menu items, menu text, and Help Text are displayed on a Kiosk page. If you select one or more languages here, then this Kiosk Profile will inherit the language setting in EMS Kiosk global parameters (and if these are not specified, the default language is US English). If you add multiple languages here for users to choose from, you can set a language as the default to display on the kiosk unless they choose another language on the Kiosk Profile Tab.

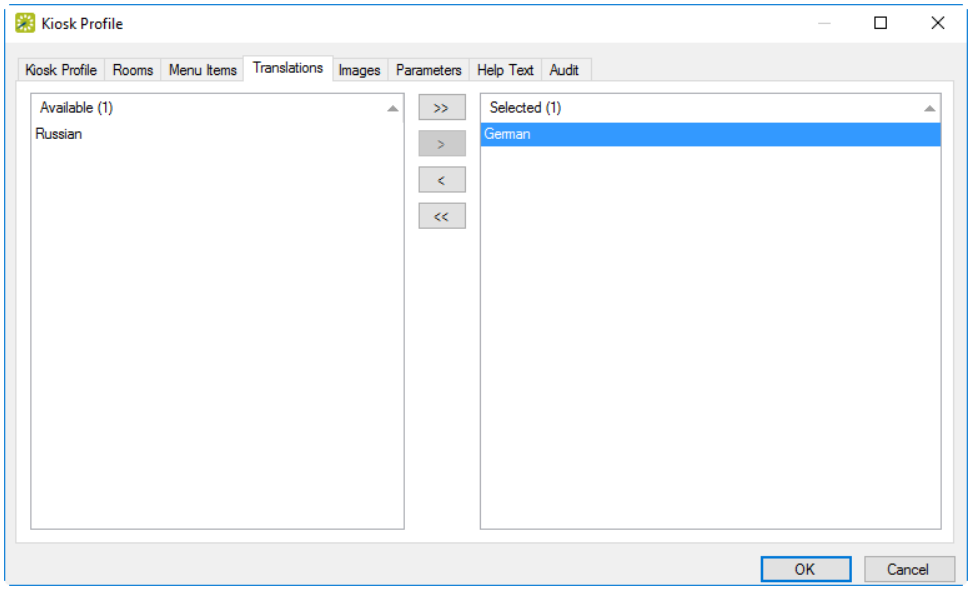
Note:

If the language you want is not available in this dropdown field, then the translation must be defined globally for EMS Desktop Client (see Configure Language Translations). Global parameters can be accessed under **System Administration** > **Settings** > **System Parameters**. Additionally, in order to make alternate languages available on your kiosks, you must enable the Language Selection menu for EMS Kiosk App.

Note:

The EMS Kiosk App time format, 12-hour vs. 24-hour, is tied to the default profile language or the language users select in the app using the **Change Language** button. For example, if the default language for your EMS Kiosk profile is Russian, or users select Russian on the EMS Kiosk App, the 24-hour format will be used. If the default/selected language is English, the 12-hour format will be used.

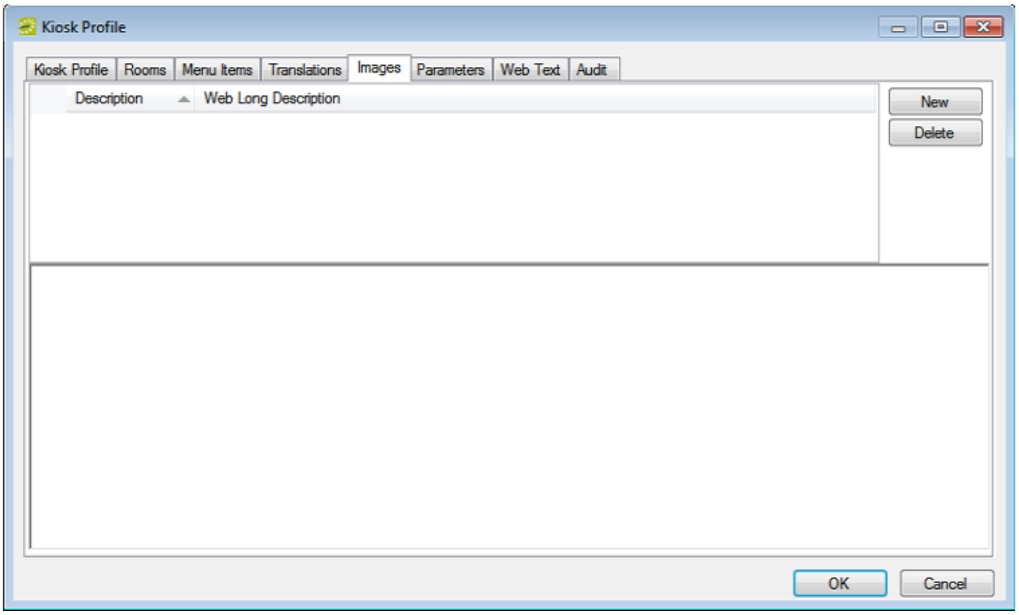
1. To add a translation to your Kiosk Profile, in the Available list, select the language (or CTRL-click to select the multiple languages to be available on the Kiosk).
2. Click the **Move** (**>**) button to move the selected items to the Selected list.
3. Click **OK**.



Translations Tab

Images Tab

Use the **Images** tab to select the images (map of area, image of building, and so on) that show in the Information area of EMS Kiosk.



Images Tab

1. Click **New** to open the Find Image dialog box, and then browse to and select the image to be displayed in the Images area of EMS Kiosk App. 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

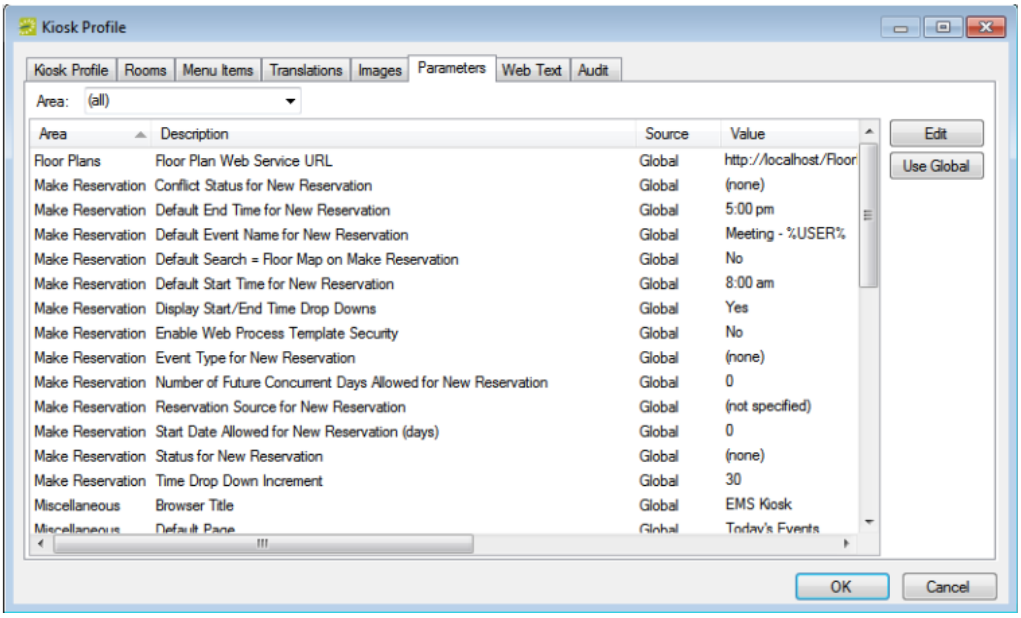
You can set *global* parameters to affect all Kiosk Profiles, or you can set parameters for a single Kiosk Profile. See Also: EMS Kiosk App Parameters.

Note:
Click the **Use Global** button to inherit settings from Global parameters.

The parameters on this tab are grouped based on the functional areas that they affect. You can click **Edit** to change the parameter settings as needed on this tab.

Important!

There are certain parameters that no longer impact the current version of the EMS Kiosk App (release in Fall of 2017). They will still be visible to Administrators because these parameters are being utilized by previous versions of the EMS Kiosk (Legacy). See the table below for more information regarding these parameters.



Parameters Tab

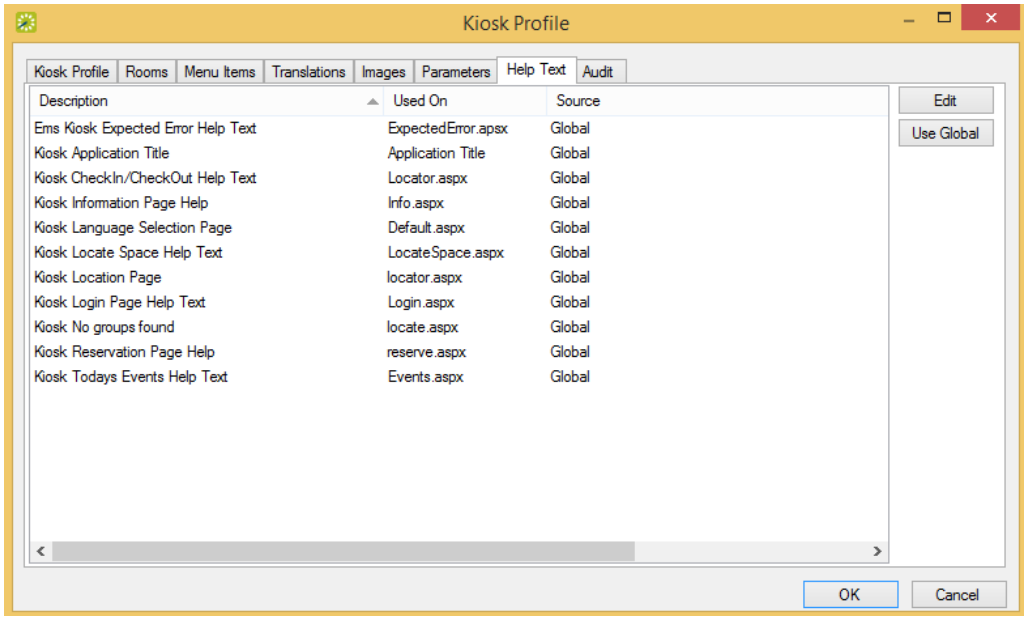
Parameters No Longer Used by Current Version of the EMS Kiosk App

Parameter Area	Description
Miscellaneous / Browser Title	The redesigned EMS Kiosk App no longer displays a browser title.
Miscellaneous / Display Cancel Button for Group Searches	This parameter is not used in the new design.
Security / Show 10 Key As Modal	In the redesigned EMS Kiosk App, the 10-key keyboard does not appear as a modal. Therefore, this parameter is ignored in the redesigned

Parameter Area	Description
	version.
Floor Plan / Floor Plan Web Service URL	The Floor Plan URL is now provided by the EMS Platform Services and does not have to be set separately in the EMS Kiosk App. This parameter will thus be ignored.
Log Off (Menu Items tab)	User logoff is handled differently in the redesigned EMS Kiosk App, which eliminates the need for a distinct 'Log Off' button. This menu item will thus be ignored.
Default Page (Menu Items tab)	The 'Default Page' is a way to configure the home screen. However, it is not a specific button that a user can press. Thus, this option will not apply to the redesigned EMS Kiosk App.

Help Text Tab

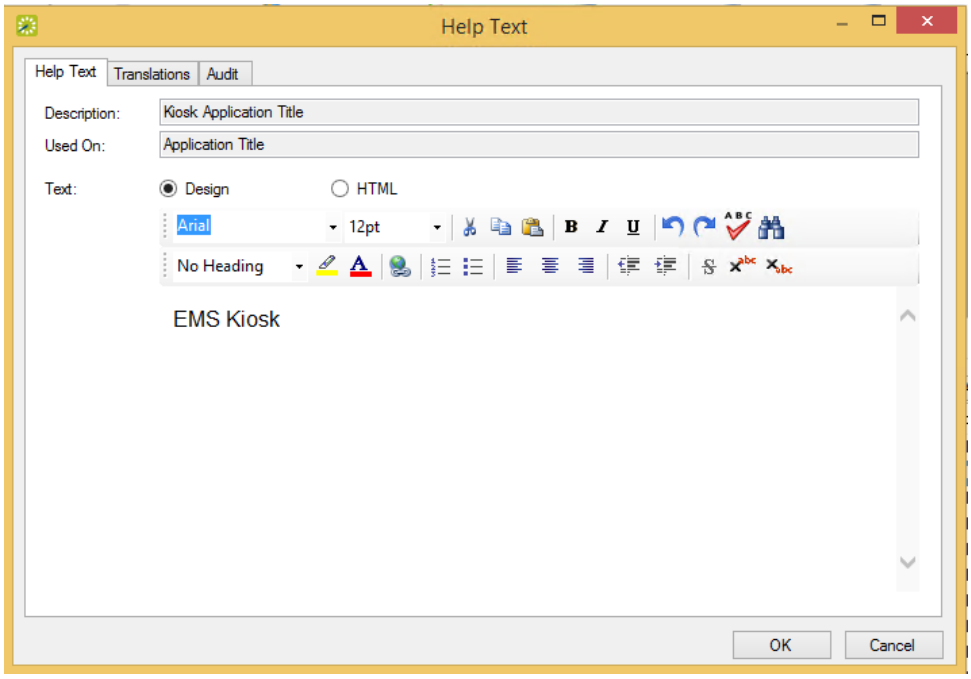
Help Text is custom help text or policies and procedures that are specific to your organization that is displayed on various pages in EMS Web App and EMS Kiosk. Help Text is defined at the global level under **Configurations** > **Everyday User Applications** > **Help Text**. (See Configure Help Text.) You use the **Help Text** tab to override the global setting for a help text and customize the help text for a specific Kiosk Profile.



Help Text Tab

To customize help text on the **Help Text** tab, complete these steps:

1. Select the Help Text that you are customizing, and then click **Edit**. The Help Text dialog box opens. The **Help Text** tab is the active tab. The tab contains options for entering and configuring the Help 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.



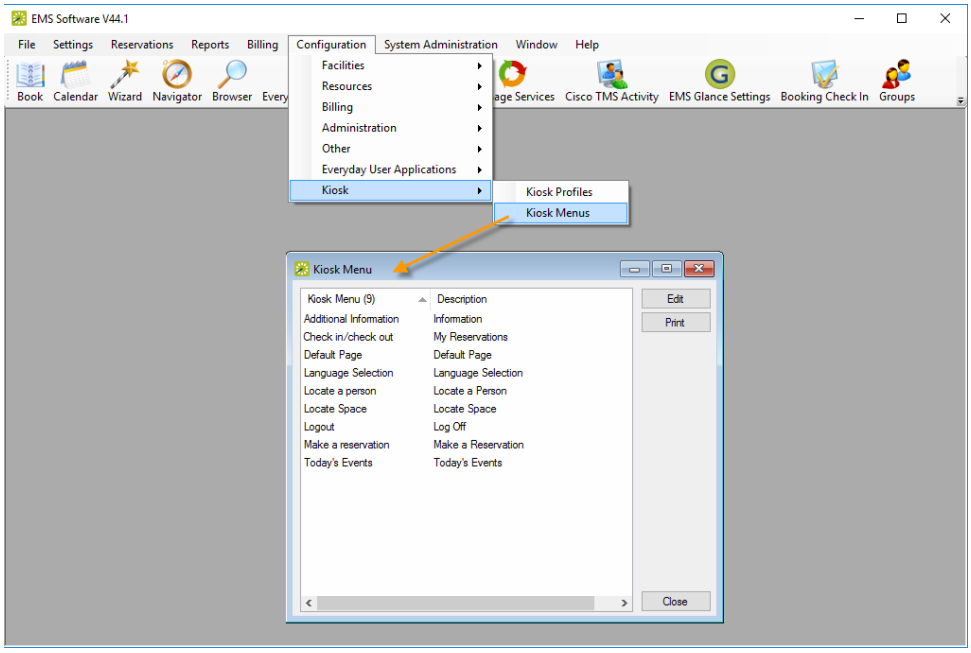
Selecting Design in the Help Text Tab

2. If Help Text translations have been defined for web templates or kiosk pages (see Configure Language Translations for Everyday User Applications), then open the **Translations** tab, and for each translation, click in the Text field, and enter the appropriate translation for the Help Text item.
3. Click **OK**. The Help Text dialog box closes. You return to the **Help Text** tab with the newly configured Help 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.

CHAPTER 114: Configure EMS Kiosk App Menus

EMS Kiosk menus are displayed as buttons at the top of EMS Kiosk pages. You can customize and rename EMS Kiosk menus through the EMS Desktop Client.

1. On the EMS Desktop Client menu bar, click **Configuration** > **Kiosk** > **Kiosk Menus**. The Kiosk Menus window opens. This window lists EMS Kiosk menus; the **Description** is the text that appears on the menu button at the top of EMS Kiosk pages.

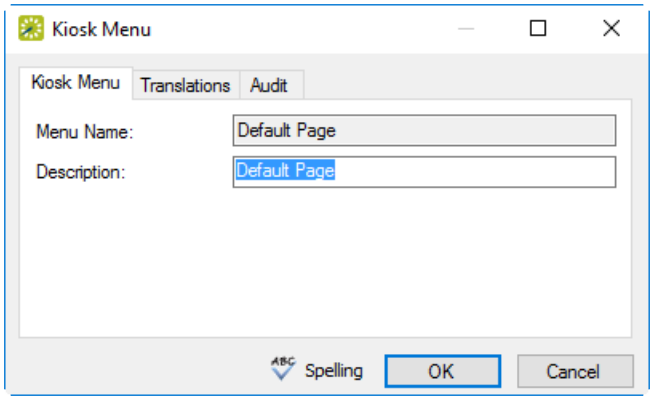


EMS Kiosk Menus Dialog Box

2. If translations have been defined for your implementation and you want to make them available on kiosks, enable the **Language Selection** option.

3. Select the menu and click **Edit**. The Kiosk Menu dialog box opens, showing the menu name and its current description. You cannot edit the menu name.

4. In the Description field, edit the description for the kiosk menu (maximum of 50 characters, including spaces).



Description in the EMS Kiosk App Menu

5. If translations have been defined for your implementation and you enabled the **Language Selection** option (in Step 1 above), open the **Translations** tab. For each translation, enter the appropriate description that is to be translated.

> **Note:**
> The EMS Kiosk App time format, 12-hour vs. 24-hour, is tied to the default profile language or the language users select in the app using the **Change Language** button. For example, if the default language for your EMS Kiosk profile is Russian, or users select Russian on the EMS Kiosk App, the 24-hour format will be used. If the default/selected language is English, the 12-hour format will be used.

6. Click **OK**. The Kiosk Menu dialog box closes, and you return to the Kiosk Menus window with the newly configured menu automatically selected.

CHAPTER 115: Configure Groups (Toolbar Icon)



Note:

Groups Are Often Re-Labeled "Employees" or "Customers"

Groups is an icon on the application toolbar. The label "Groups" is generic and is the default label delivered with EMS Desktop Client. The Groups label is often re-labeled "Employees" or "Customers." Groups can be associated with Billing and PO numbers, booking templates, and so on, and greatly affect what your end-users have access to during the booking process.

CHAPTER 116: Configure Groups

A group is a team of users for which reservations are made at your facilities. A group can be as granular as a single person, or it can represent an entire organization or department of people (for example, an Academic Affairs group). 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. If you want to first confirm that a group has not already been configured, you can search for the group.

This topic will provide information on the following:

- Search for a Group and/or Contact
- Configure Groups

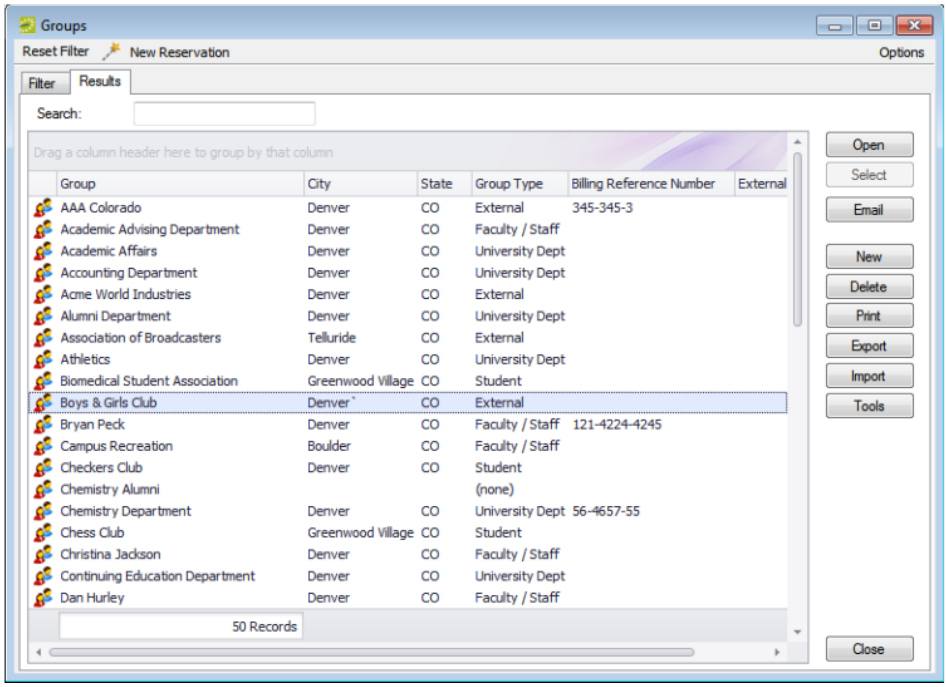
Note:

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.

Additionally, if your organization has licensed EMS Human Resources Toolkit, this affects how data is imported for your users, groups, and contacts; see the HR Toolkit Installation Guide.

Search for a Group and/or Contact

1. On the toolbar, click the Groups icon. The Groups dialog box 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.



Results Tab of the Groups Dialog Box

Note:
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.

Filter Tab Field Descriptions

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

Option	Description
	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.
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 Association of Broadcasters and Biomedical Student Association.

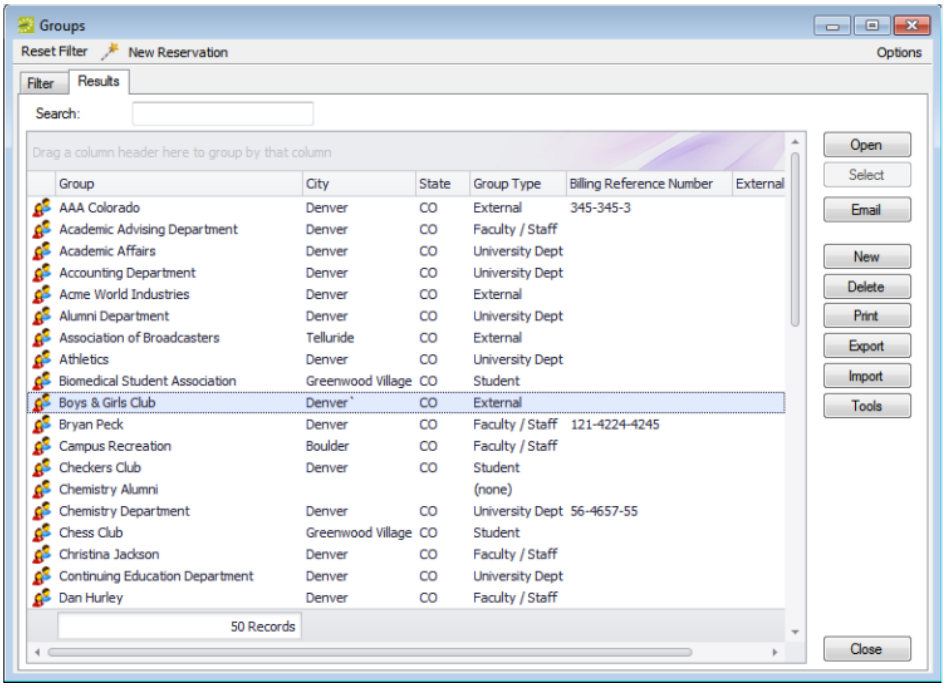
Configure Groups

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.

Note:

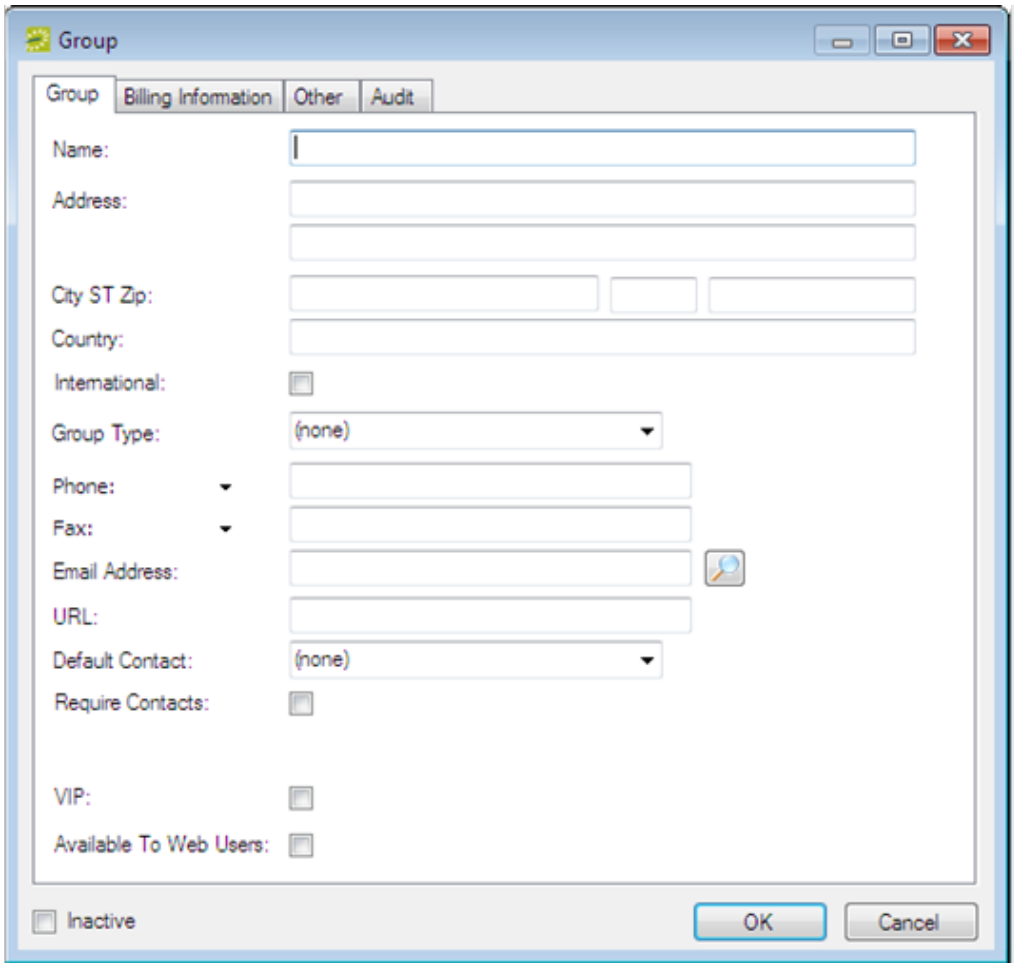
Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured.

1. On the toolbar, click the Groups icon. 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.



Results Tab of the Groups Dialog Box

2. Click **New**. The Group dialog box opens. The **Group** tab is the active tab.



Group Tab of the Group Dialog Box

3. Enter the summary information for the new group.

Note:
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.

Group Tab Field Descriptions

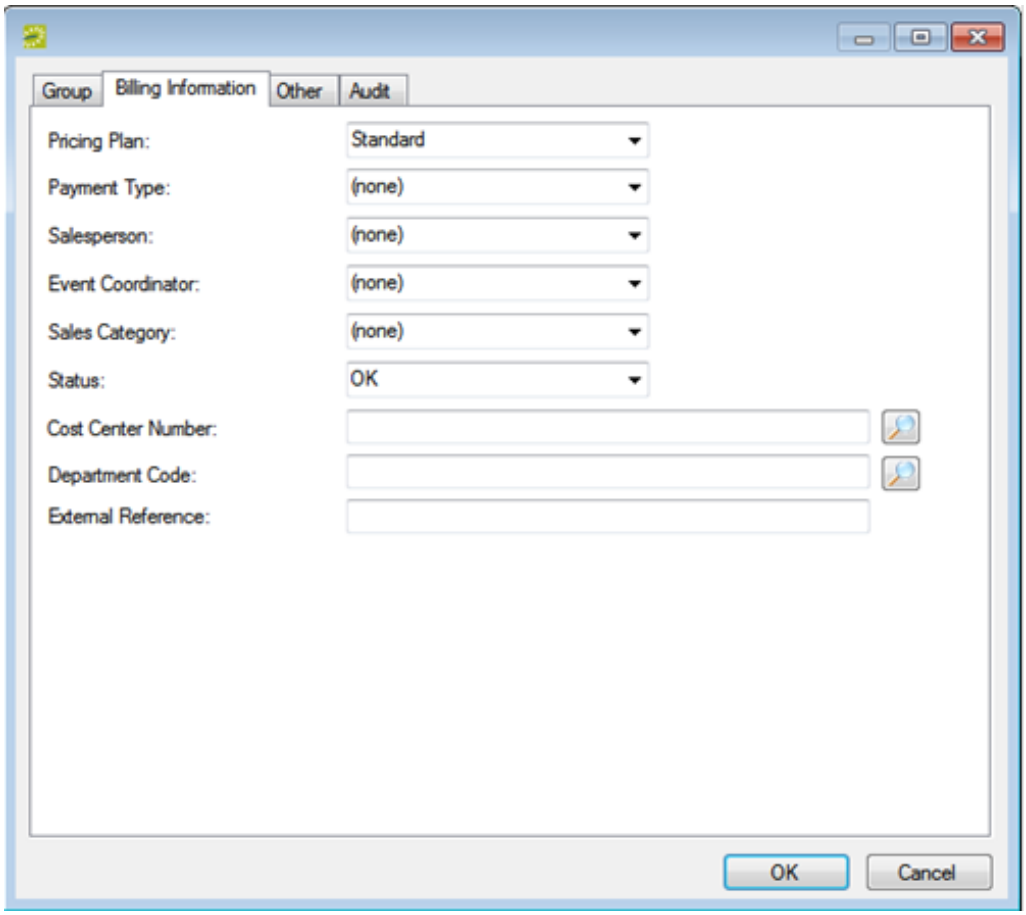
Field	Description
Name	Required field. The name of the group.

Field	Description
	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”.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a drop-down 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.

Field	Description
	Note: Everyday Users can link to this group's website on EMS Web App.
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 look up the group in EMS Web App.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

Note:
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.

4. Optional: Open the **Billing Information** tab and add the default billing information for the group. The values you specify here will be used as the default values when a new reservation is made for the group. An EMS user can change these values if needed.



Billing Information Tab of the Group Dialog Box

Concept: Entering Billing Info Here Assigns It To The Group

This means that whenever a member of this group books space, this billing info will be applied to the booking. Therefore, the best practice is to first define you Pricing Plans, Payment Types, and other billing info before defining it here for the group.

Billing Information Tab Field Descriptions

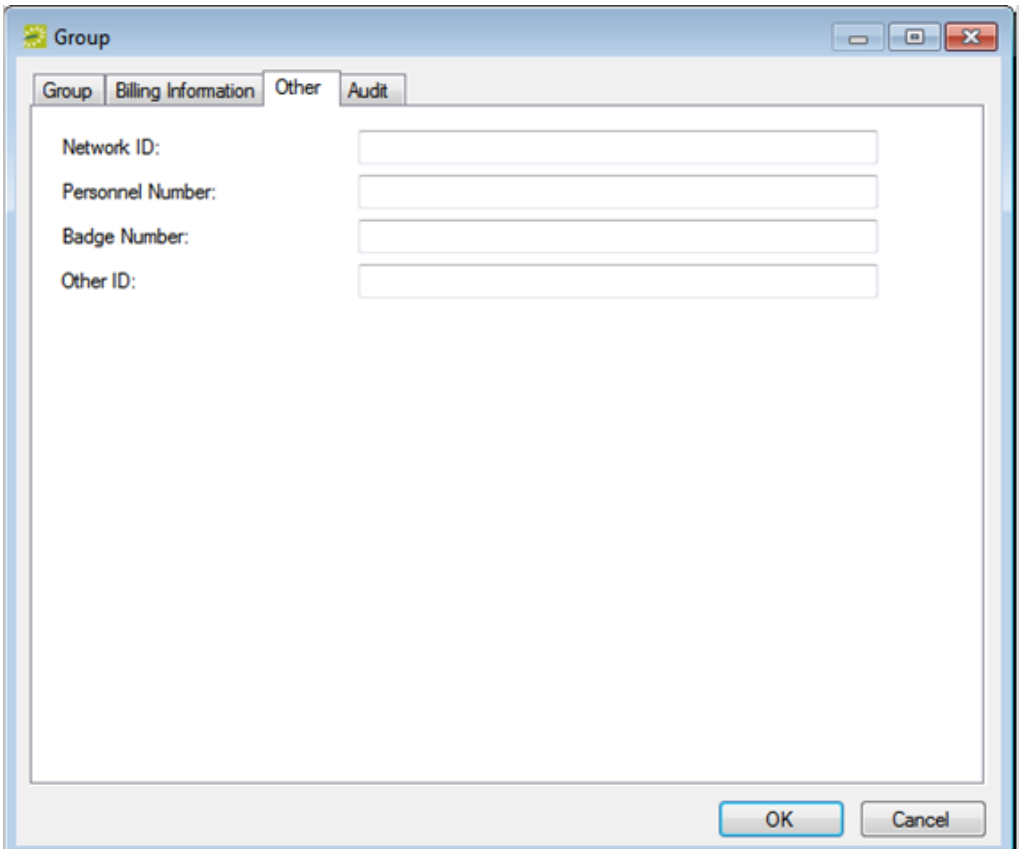
Option	Description
Pricing Plan	If the appropriate pricing plan is not available, you can configure it. See Configuring Pricing Plans.
Payment Type	If the appropriate payment type is not available, you can configure it. See Configuring Payment Types.
Salesperson	The salesperson for the event.

Option	Description
	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.
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.
Sales Category	If the appropriate sales category is not available, you can configure it. See Configuring Sales Categories.
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.
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.

Option	Description
	Note: To define a list of eligible billing references that are specific to the group, see Configuring Additional Information for a Group.
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.
External Reference	Links the group to an outside program, if needed.
Account	If the appropriate account is not available, you can configure it. See Configuring Accounts. **Note:** This field is displayed only if the EMS system parameter "Show Account Field on Group" is set to "Yes." See EMS System Parameters.

Note:
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.

5. Optional: Open the **Other** tab and add any other identifying information for the group as needed.

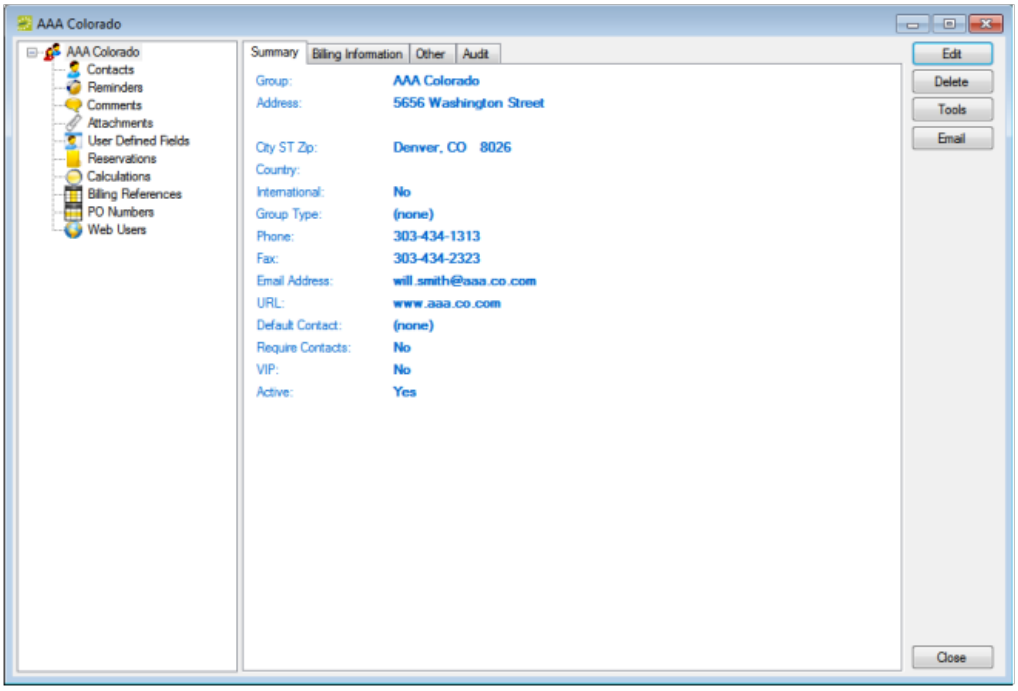


Other Tab of the Group Dialog Box

Other Tab Field Descriptions

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.

6. Click **OK**. The Group dialog box closes and a group-specific window opens with the newly configured group automatically selected. You can use the options on this window to carry out additional configuration for the group. See Configuring Additional Information for a Group.



Group-Specific Window Displaying the Newly Configured Group

CHAPTER 117: Configure 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.

This topic will provide information that will allow you to:

- Create an Everyday User from a Group
- Assign a Group to an Everyday User
- Assign Calculations to a Group
- Configure a List of Billing Reference Numbers
- Configure a List of PO Numbers

Create an Everyday User from a Group

An *Everyday User* is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. 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 an everyday user from the group. This user can then create and view reservations on behalf of a group or groups in EMS Web App. You can create only one everyday user from a group. When you create an everyday user, you can also specify one or more delegates for the everyday user. A delegate is an everyday user who can create and view reservations on behalf of another everyday user. See Also: Configure Everyday Users.

1. Open the Groups window and search for the group for which you are creating the everyday user.
2. On the Groups window, select the group, and then click **Tools** > **Create Everyday User**.

   A group-specific dialog box opens. The **Everyday User** tab is the active tab.

> **Note:**
> The **User Defined Fields** tab shows the prompts an everyday user must answer when requesting an account through EMS Web App, and it is not relevant to the procedure described below.

3. Enter the information for the new everyday user. You can make additional changes later.

Field	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that an everyday user must enter to log in to EMS Web App.
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 EMS Web App.)
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 everyday user to an outside program if needed.
Network ID	Optional field. the everyday user's network ID.
Email Opt Out	Select this option if the everyday user is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the everyday user: • Active—the everyday user can log in to EMS Web App. • Inactive—The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. • Pending—the everyday user cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security	This determines the everyday user's access to the system, such as

Field	Description
Template Required field	the menu items that the user can view and the tooltip information the user can view when 'rolling-over' an event in EMS Web App. **Note:** For detailed information about Everyday User security templates, see Configure Everyday User Security Templates.
Time Zone	Required field. Select the time zone for the user.

4. Open the **Everyday User Process Templates** tab and on the **Available** list, select one or more process templates (use CTRL-click to select multiples) to which you are assigning the user, and Move (>) them to the **Selected** list.

> **Note:**
> A "process template" defines the functions available to each type of everyday user in EMS Web App when they submit a request for a reservation. For detailed information about process templates, see Configure Everyday User Process Templates.

5. Open the **Groups** tab and do the following to specify the groups on whose behalf the everyday user can view and make reservations in EMS Web App:
   - To list all active groups in your system, click **Display**.
   - To search for specific groups, use the **Find** and **Group Type** fields and then click **Display**.
   - In the **Available** list, select one or more groups and move (>) them to the **Selected** list.
6. Open the **Delegates** tab, where you specify the delegates for the everyday user, and search for specific delegates and move (>) them to the **Selected** list.

> **Note:**
> The Spelling option enables you to spell-check any information that you manually entered for the everyday user.

7. Click **OK**.

The dialog box for creating an everyday user closes and a message opens indicating that the everyday user was created successfully.

8. Click **OK** .

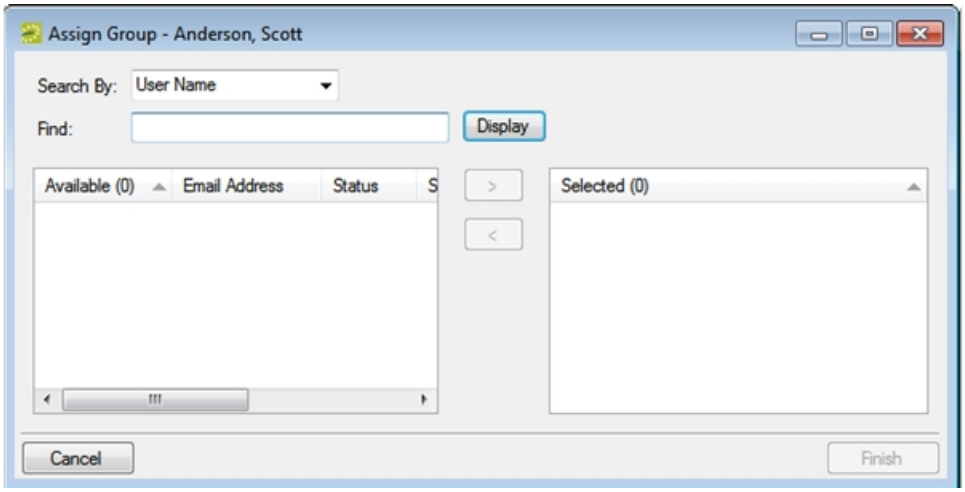
   The message closes and you return to the Groups window.

Assign a Group to an Everyday User

When you add a new group in your EMS database, you should also assign the group to an everyday user. This everyday user can then create and view reservations on behalf of the group in EMS Web App. You can assign a group to one or more everyday users.

1. Open the Groups window and search for the group to which you are assigning the everyday user.
2. On the Groups window, select the group, and then click **Tools** > **Assign to Everyday Users**.

   The Assign Group dialog box opens.



3. Do one of the following to select the everyday 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 everyday users. Select the everyday user, or CTRL-click to select multiple everyday users, and then Move (>) to the **Selected** list.
   - In the **Search By** drop-down list, select the option by which to search (Email Address or User Name) and then in the **Find** field, enter a search string, and then click **Display**. Select the everyday user (CTRL-click to select multiple users), and then Move (>) to the **Selected** list.
4. Click **Finish**. A message opens indicating that the group was assigned successfully.
5. Click **OK** .

   The message closes and you return to the Groups window.

Assign Calculations to a Group

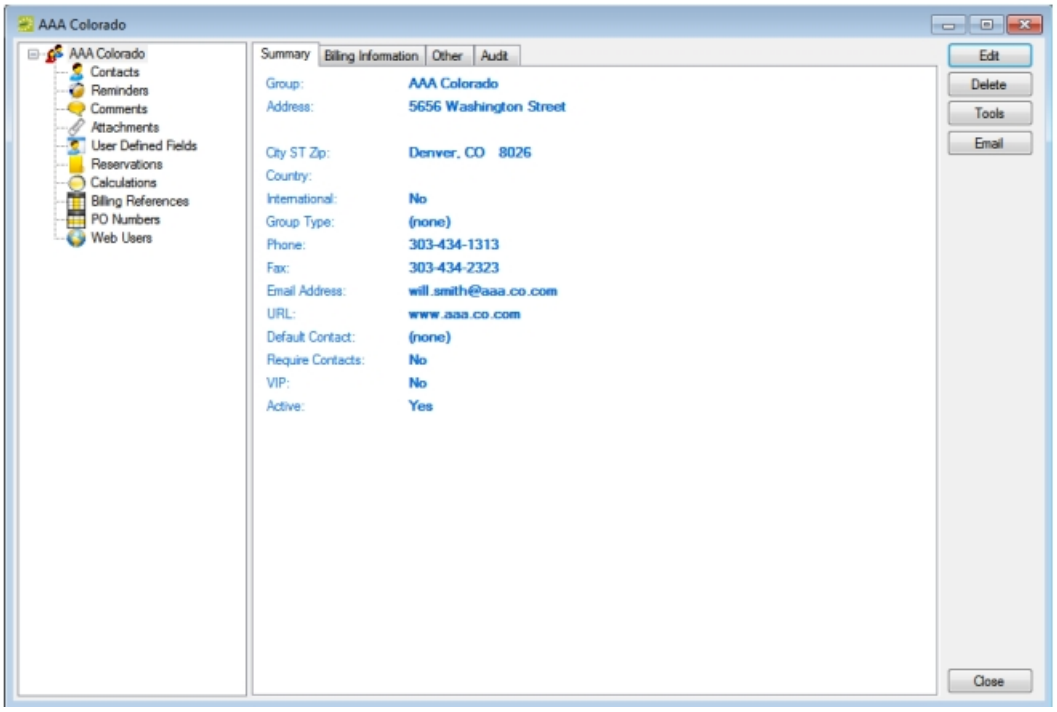
Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. When you configure a group, you can assign the calculations that are to always apply to the group.

1. Open the Groups window and search for the group to which you are assigning the calculations.

   See Search for a Group and/or Contact.

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.

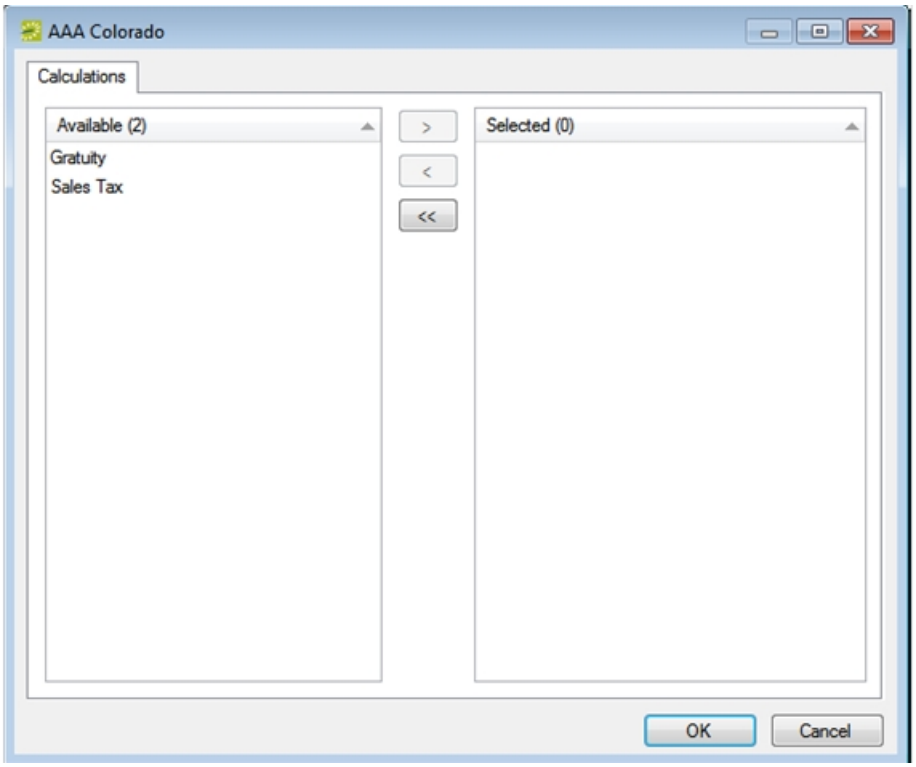


3. In the left pane of the group-specific window, select **Calculations**.

   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.



5. On the **Available** list, select the calculation (CTRL-click to select multiple calculations) that you want to always apply to this group, and then Move (>) to the **Selected** list.

> **Note:**
> If the appropriate calculation is not available, you can configure it. See Configure Calculations.

Remember, you can also assign calculations to a group type. (See Configure Group Types.) If you have already assigned calculations for this group's type, then these calculations are automatically applied to the group. The calculations show 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.

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.

2. On the Groups window, select the group, and then click **Open**.

A group-specific window opens showing the group as automatically selected.

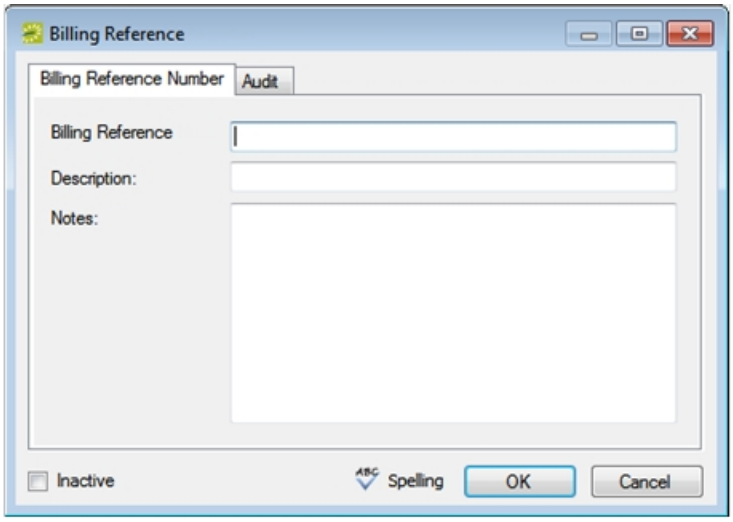
3. In the left pane of the group-specific window, select **Billing References**.

   A list of all currently active billing reference numbers for the group shows in the right pane of the group-specific window.

> **Note:**
> You can display all billing reference numbers regardless of status by clicking **Show Inactive**. Any inactive billing reference numbers show in italics in the right pane.

4. Click **New**.

   The Billing Reference dialog box opens.



5. 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.

Note:
You can click **Spelling** to spell-check the information for the PO number before you save it.

6. 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.

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.
2. On the Groups window, select the group, and then click **Open**.

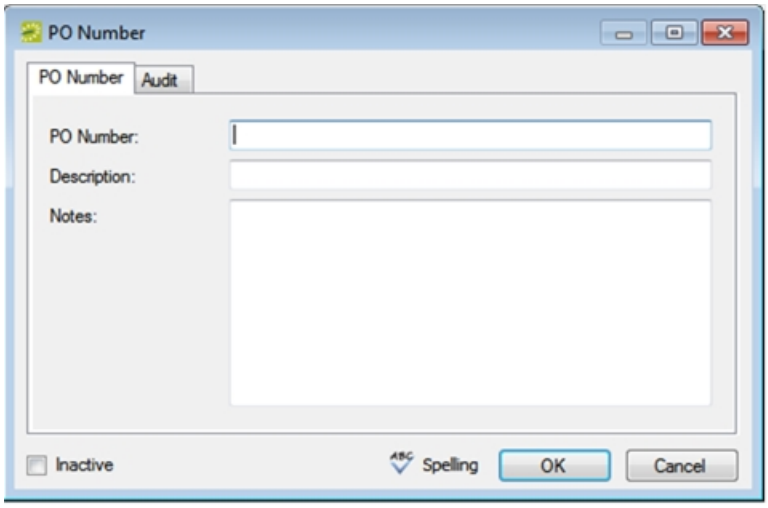
   A group-specific window open. The group is automatically selected in the window.
3. In the left pane of the group-specific window, select **PO Numbers**.

   A list of all currently active PO numbers for the group shows in the right pane.

Note:
You can display all PO numbers regardless of status by clicking **Show Inactive**. Inactive PO numbers show in italics.

4. Click **New**.

   The PO Number dialog box opens.



5. 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.

Note:
You can click **Spelling** to spell-check the information for the PO number before you save it.

6. Continue with any other optional configuration for the group as needed; otherwise, click **OK** to close the dialog box and return to the group-specific window.

CHAPTER 118: Edit 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 Everyday Users on the group-specific window.

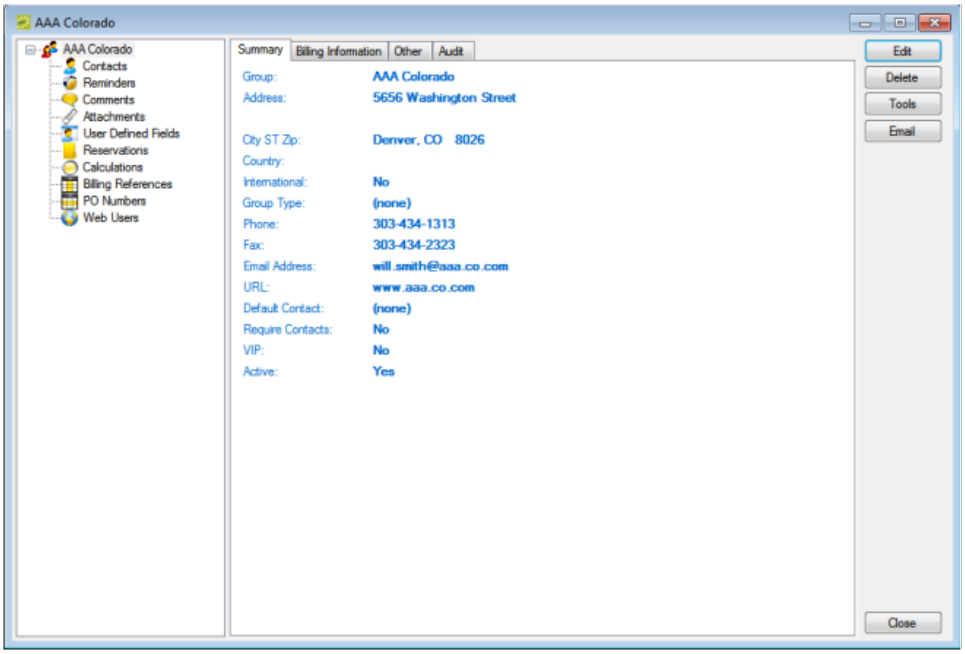
When you select a configuration item (contacts, reminders, and so on) for editing in the group-specific window, the right pane for the window is an EMS browser window. See The EMS Browser Window.

This topic will provide instructions on editing the following group information:

- Edit Summary, Billing, and/or Other Group Information
- Edit the Contacts for a Group
- Edit the Calculations for a Group
- Edit the Billing Reference Numbers for a Group
- Edit the PO Numbers for a Group
- Edit Everyday Users for a Group

Edit Group Information

1. Open the Groups window and search for the group for which you are editing the information. See Search for a group and/or contact.
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.



Group-specific Window

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 Configure Groups.

Summary Information

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 Zip Country	The street or mailing address for the group.

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 group. **Note:** The Phone and Fax fields have a drop-down 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:** Everyday Users can link to this group's website on EMS Web App.
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.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

Billing Information

Option	Description
Pricing Plan	If the appropriate pricing plan is not available, you can configure it. See Configure Pricing Plans.
Account	If the appropriate account is not available, you can configure it. See Configure Accounts.
Payment Type	If the appropriate payment type is not available, you can configure it. See Configure Payment Types.
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 modify an existing user account, or create a new user account as needed. See Configure Users.
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 modify an existing user account, or create a new user account as needed. See Configure Users.
Sales Category	If the appropriate sales category is not available, you can configure it. See Configure Sales Categories.
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

Option	Description
	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 Edit System Parameters.
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 Configure Additional Information for a Group.
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 Configure Additional Information for a Group.
External Reference	Links the group to an outside program, if needed.

Other Information

Option	Description
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.

Option	Description
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

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.

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 Configure Contacts Manually.

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 group. **Note:** The Phone and Fax fields have a drop-down 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 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.

Field	Description
	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.

4. Click OK. The Contact dialog box closes. You return to the group-specific window with Contacts still selected.

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 Configure Calculations.
   - 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.

Note:
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 Configure Group Types), or you must edit the group type for the group. See Edit summary, billing, and/or other group information.

3. After you edit the information, click OK. The Calculations dialog box closes. You return to the group-specific window with Calculations still selected.

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.
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.

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.

Edit Everyday Users for a Group

When you edit the Everyday Users for a group, you can select additional Everyday Users for the group, or you can remove Everyday Users for the group. If you need to edit the Everyday User itself or the delegates for a Everyday User, you must do so in the Everyday User configuration area. (See Configure Everyday Users.)

1. In the left pane of the group-specific window, select Everyday Users. The Everyday Users dialog box opens.

2. Do one or both of the following:

   - To add a new Everyday Users for the group:

   - Leave the Find field blank, and then click Display to open a list of all currently active Everyday Users. Select the Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.

   - In the Search By drop-down 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 Everyday User, or CTRL-click to select multiple Everyday Users, and then click

the Move button (>) to move the selected users to the Selected list.

> **Note:**
> 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@dea.com but not dbobbett@dea.com.

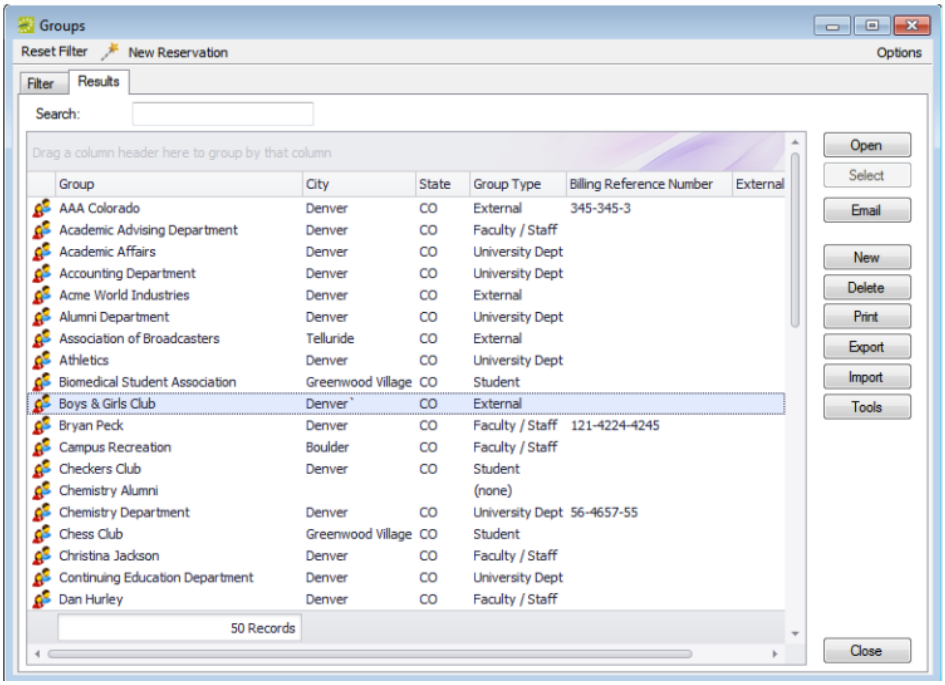
- To remove an Everyday User from a group, in the Selected field, select the user, or CTRL-click to select the multiple Everyday Users that you are removing from the group, and then click the Remove button (<) to move the selected Everyday Users to the Available list.

3. After you edit the information, click OK. The Everyday User dialog box closes. You return to the group-specific window with Everyday Users still selected.

CHAPTER 119: Import Groups

You can import groups into your EMS database from a tab-delimited text file. (See Also: Group Import File Specifications.)

1. On the toolbar, click the Groups icon. The Groups window opens.



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.

CHAPTER 120: Configure 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.

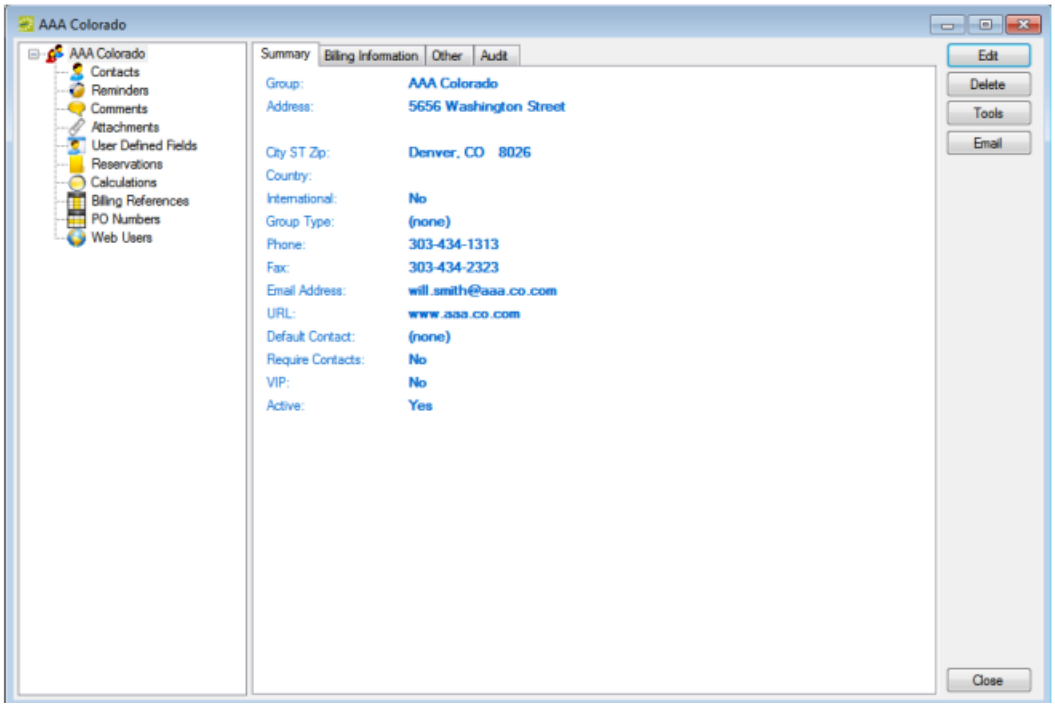
> **Note:**
> You can also configure and edit a contact "on the fly" during the reservation process. See the EMS User's Guide for details.

This topic will include the following information:

- Configure Contacts
- Manually Configure Contacts
- Configure a Contact from a Group
- Create an Everyday User from a Contact

Configure Contacts

1. Open the Groups window and search for the group for which you are configuring the contact. See Search for a Group and/or Contact.
2. Select the group, and then click Open. A group-specific window open. The group is automatically selected in the window.



Group-specific Window

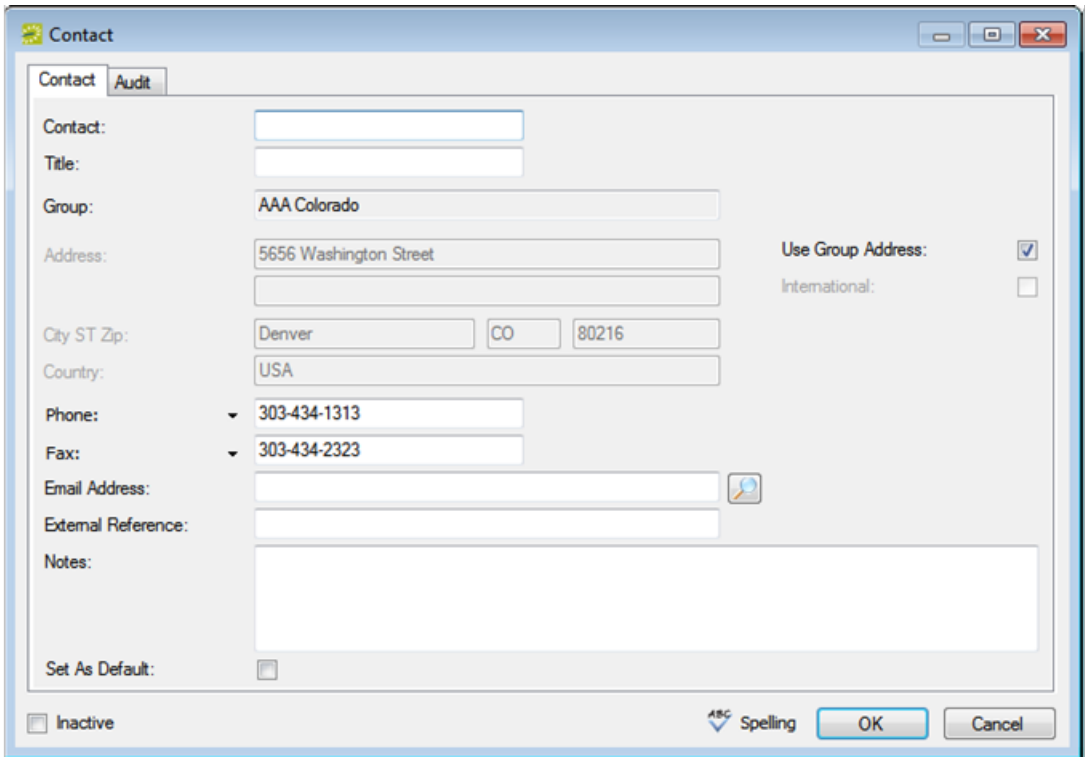
3. In the left pane of the group-specific window, select Contacts. A list of all currently active contacts for the group is displayed in the right pane of the group-specific window.

> **Note:**
> 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 either manually configure a contact or configure a contact from a group.

Manually Configure Contacts

1. Click New. The Contact dialog box opens.



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.

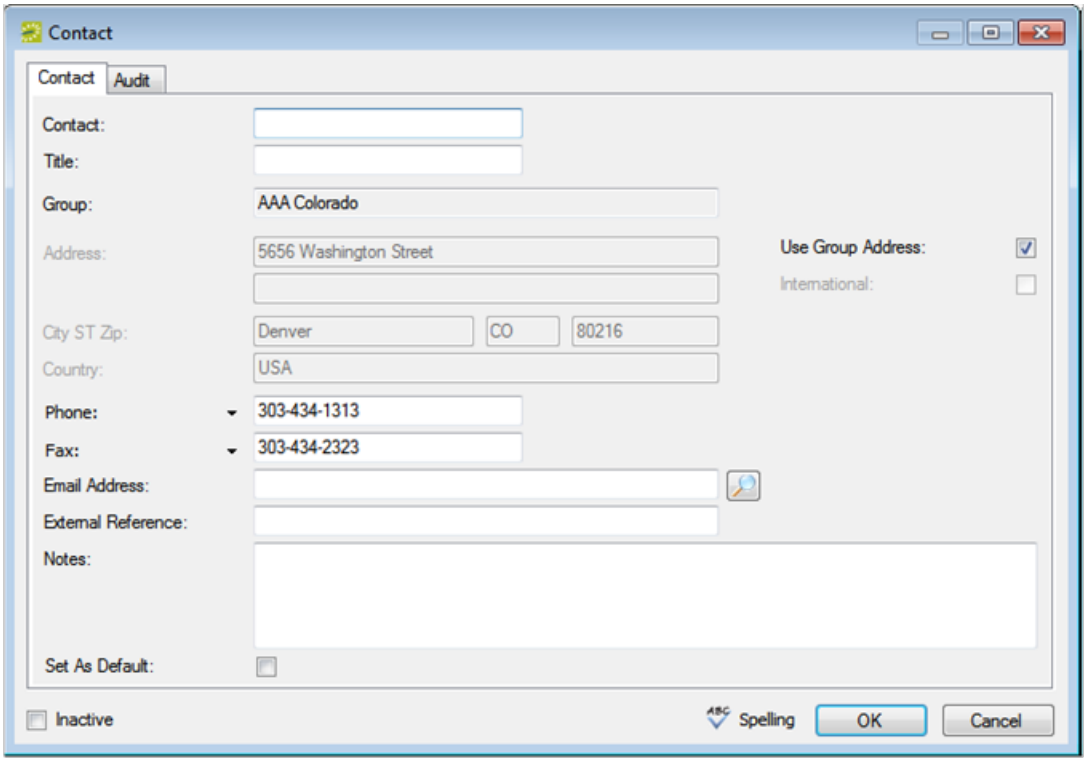
Field	Description
Phone Fax	The phone number and fax number for the contact. By default, they are set to the phone number and fax number for the group, but you can always edit these values. **Note:** The Phone and Fax fields have a drop-down list available from which you can select a different value (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.

Field	Description
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 an Everyday User from the contact.
4. Click OK. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

Configure a Contact from a Group

1. Navigate to **Tools** > **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 Search for a Group and/or Contact.) 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.)



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.
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 drop-down 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.

Field	Description
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 Edit the Contacts for a Group.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

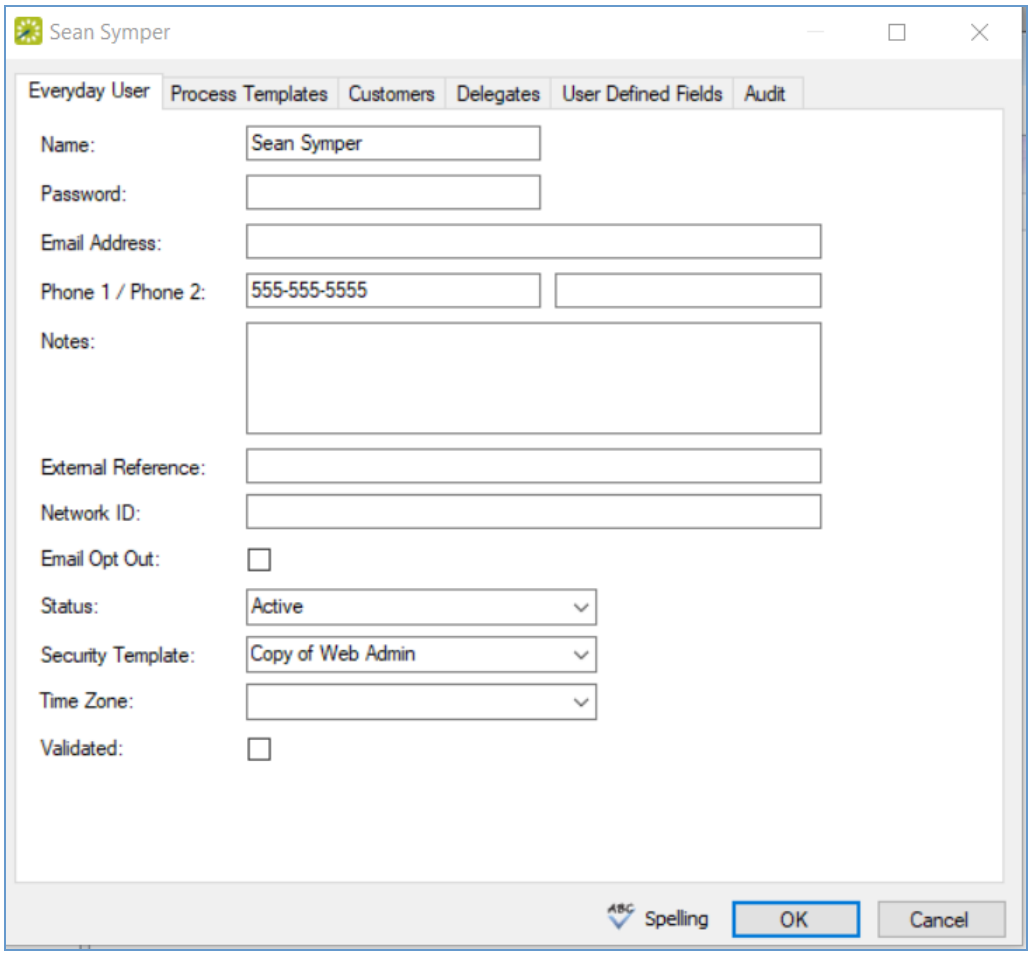
4. Optionally, do one or both of the following:
   - Click Spelling to spell check the information for the contact before you save it.
   - Create an Everyday User from the contact.
5. Click OK. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

Create an Everyday User from a Contact

An Everyday User is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. When you add a contact to a group in your EMS database, you might also need to create an Everyday User from the contact. This Everyday User can then create and view reservations on behalf of the contact in EMS Web App. You can create only one Everyday User from a contact. When you create an Everyday User, you can also specify one or more delegates for the Everyday User. A delegate is an Everyday User who can create and view reservations on behalf of another Everyday User.

1. If needed, open the group that contains the contact in the group's specific window. See Configure Contacts.
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 Everyday User.
4. Click Tools > Create Everyday User from Contact. A contact-specific dialog box opens. The Everyday User tab is the active tab.

The User Defined Fields tab displays the questions that an Everyday User was required to answer when the user requested to create an account through EMS Web App and it is not relevant to the procedure that is described below.



Contact-Specific Dialog Box, Everyday User tab

5. Enter the information for the new Everyday User.

Note:

Ideally, you should enter all the necessary information for your Everyday User before you save the Everyday User; however, at any time if you need to access your Everyday User, on the EMS menu bar, click Configuration > Everyday User Applications > Everyday Users.

Field	Description
Name	Automatically populated after you select the contact.
Password	The password that an Everyday User must enter to log in to EMS Web App.
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 EMS Web App.)
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 Everyday User to an outside program if needed.
Network ID	Optional field. The Everyday User's network ID.
Email Opt Out	Select this option if the Everyday User is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the Everyday User: • Active—The Everyday User can log in to EMS Web App. • Inactive—The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. • Pending—The Everyday User cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the Everyday 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 EMS Web App. **Note:** For detailed information about Everyday User security templates, see Configure Everyday User Process Templates.

Field	Description
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the Everyday User 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.

Note:
An Everyday User Process template defines the functions that are available to each type of Everyday User in EMS Web App when the user is submitting a request for a reservation. For detailed information about Everyday User Process templates, see Configure Everyday User Process Templates.

7. Open the Groups tab and do one of the following to specify the groups on whose behalf the Everyday User can view and make reservations in EMS Web App.
   - 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.

Note:
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 AAAColorado, but not Colorado AAA.

8. Open the Delegates tab, and on the Search by drop-down list, do one of the following to specify the delegates for the Everyday User:
   - Leave the Find field blank, and then click Display to open a list of all currently available Everyday Users. Select an Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.
   - On the Search By drop-down 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 an Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.

Note:
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@dea.com* but not *dbobbett@dea.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 an Everyday User closes and a message opens indicating that the Everyday User was created successfully.
11. Click OK to close the message and return to the group-specific window.

CHAPTER 121: System Administration > 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.

You can access the System Administration settings under **System Administration** > **Settings**.

The following topics provide information about the settings found in System Administration:

- Edit System Parameters
- Import Registration Information
- Configure the Confirmation Email Subject Line
- Reservation Wizard Required Fields
- Configure Email Settings
- Set Global Email Preference to SMTP and My Personal Email Preference to Outlook

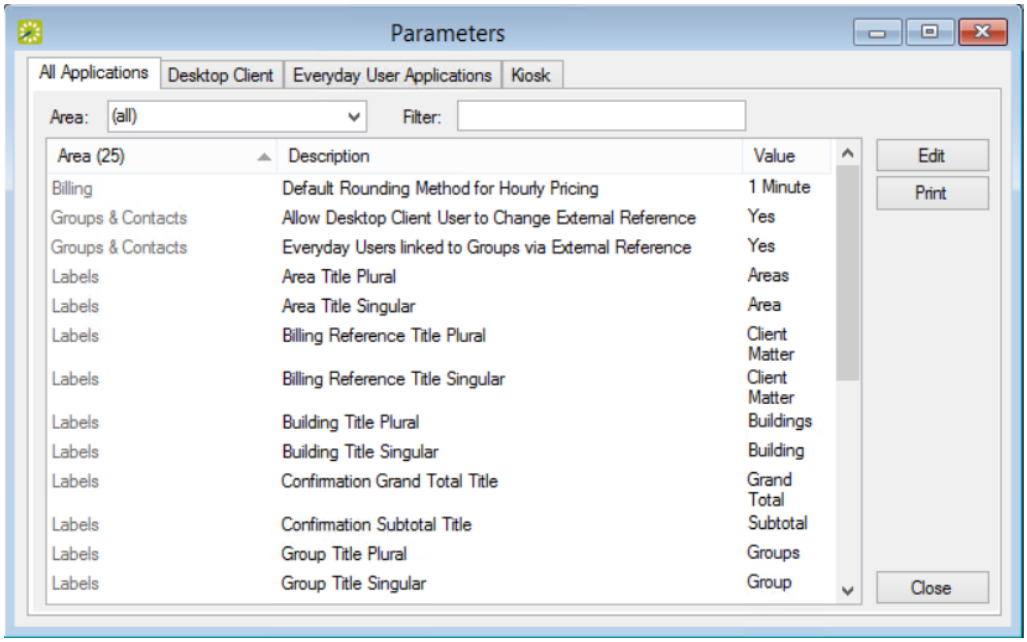
See Also: Configure Help Text.

CHAPTER 122: Edit System Parameters

System parameters are global settings that affect all your EMS users, your EMS Web App users, or your EMS Kiosk users. The parameters are grouped first by system (All Applications, EMS Desktop Client, EMS Web App, 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 when you are configuring your EMS Desktop Client, EMS Web App, or EMS Kiosk implementations.

See Also: System Parameters.

1. On the EMS menu bar, click **System Administration** > **Settings** > **Parameters**. The Parameters window opens, listing all the current settings for parameters that affect all EMS users (All Applications tab), EMS Desktop Client users, all EMS Web App (and EMS Mobile App) users (Everyday User Applications tab), and all EMS Kiosk users (Kiosk tab). The All Applications tab is the active tab.



All Applications Tab

2. Open the tab that contains the parameter that you are editing. To change field labels as they appear to your end-users, filter by "Labels" in the Area field.

> **Note:**
> You can 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 (characters must be in exact order but are not case-sensitive). For example, a search string of Security will result in both Security Status for a User and Default Security Template for a User.

3. Select the parameter that you are editing, and click Edit. The Parameter dialog box opens, showing information you can edit for the parameter.

> **Note:**
> Each type of parameter might have special options that impact Everyday Users; this affects EMS Web App and EMS Mobile App.

4. Edit the parameter as needed, and click OK. The Parameter dialog box closes. You return to the Parameters window with the edited parameter automatically selected.
5. Confirm in the Value column that you have correctly edited the value for the parameter.
6. Click Close.
   - If you edited EMS Desktop Client parameters, you might have to log out and then log back in to EMS Desktop Client for your changes to take effect.
   - If you edited Everyday User Applications parameters, a message opens indicating that you must clear the EMS Web App cache for the changes to take affect. Click OK to close the message, and then clear the EMS Web App cache by logging in to EMS Web App, clicking Admin > Admin Functions, and then clicking Clear Cache.
   - If you edited EMS Kiosk parameters, a message opens indicating that EMS Kiosk parameters have changed, and that you must clear the EMS Kiosk cache for the changes to take affect. Click OK to close the message, and then clear the EMS Kiosk cache by opening the EMS Kiosk config.aspx page.

CHAPTER 123: Import Registration Information

Note:

EMS Cloud Services Customers

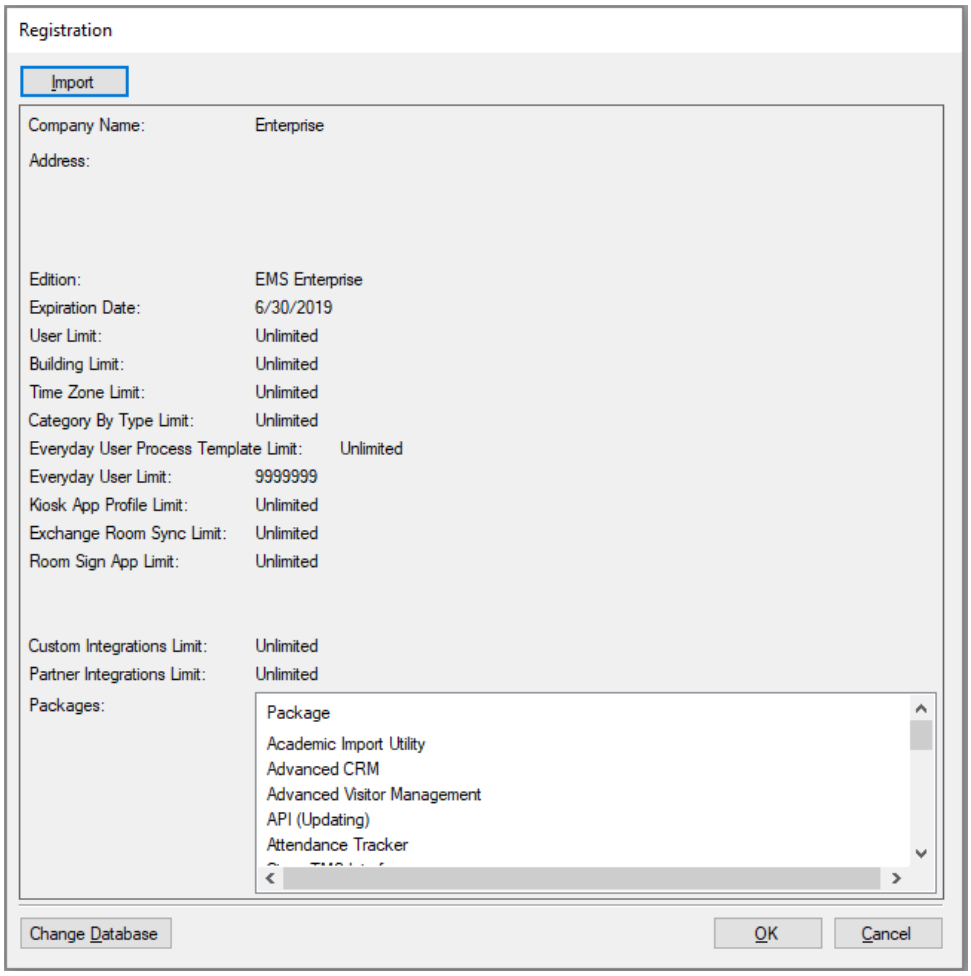
The installation and updating information in this topic does not apply to EMS Cloud Services customers. For more information regarding the installation and updating of EMS software with Cloud Services, please refer to the .

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 EMS_Sales@accruent.com or 800-288-7893 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.

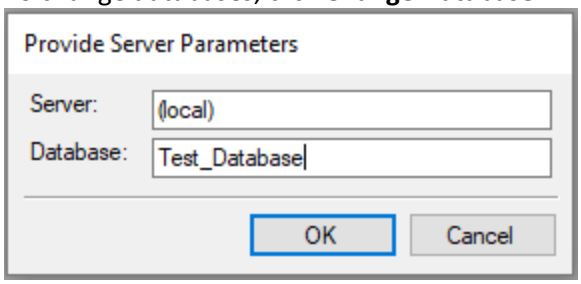
To import registration information, follow these steps:

1. On the EMS menu bar, click **System Administration** > **Settings** > **Registration** to open the Registration dialog box.
   This dialog box displays the registration information contained in the license file: your organization's name and address, the EMS edition (Workplace, Enterprise, 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, EMS Web App).
   - If the registration information is correct, continue to Step 2.
   - If the information is incorrect, contact EMS_Sales@accruent.com to have a corrected license file sent to you.



Registration Dialog Box

2. To import your registration information, click **Import**, and in the Open File dialog box, browse to and select the license file (License.lic) that you are importing and click **Open**. The License file is imported.
3. If you need to change the database that your EMS application is using, go to Step 4; otherwise, click **OK**. The Registration dialog box closes. Your EMS application is now registered and is ready for use.
4. To change databases, click **Change Database**. The Provide Server Parameters dialog box opens.



Provide Server Parameters dialog box

5. 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.

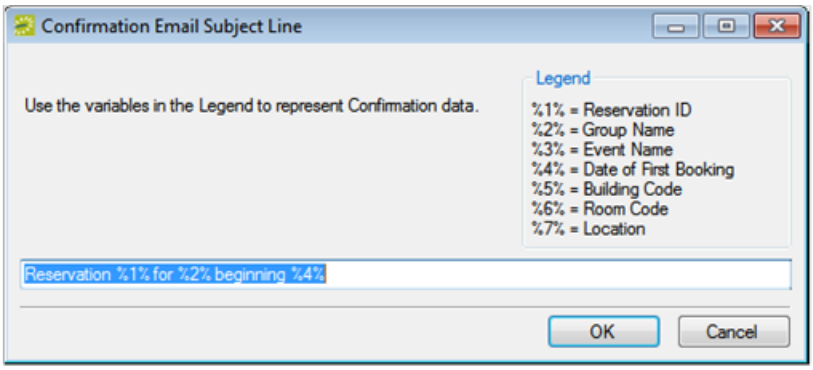
CHAPTER 124: Configure the Confirmation Email Subject Line

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 3/15/2018
- Confirmation for your event in Smith Hall on 3/22/2018

To configure the confirmation email subject line, follow these steps:

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.



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.

   Concept: Variables Pull in Selected Data
   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**.

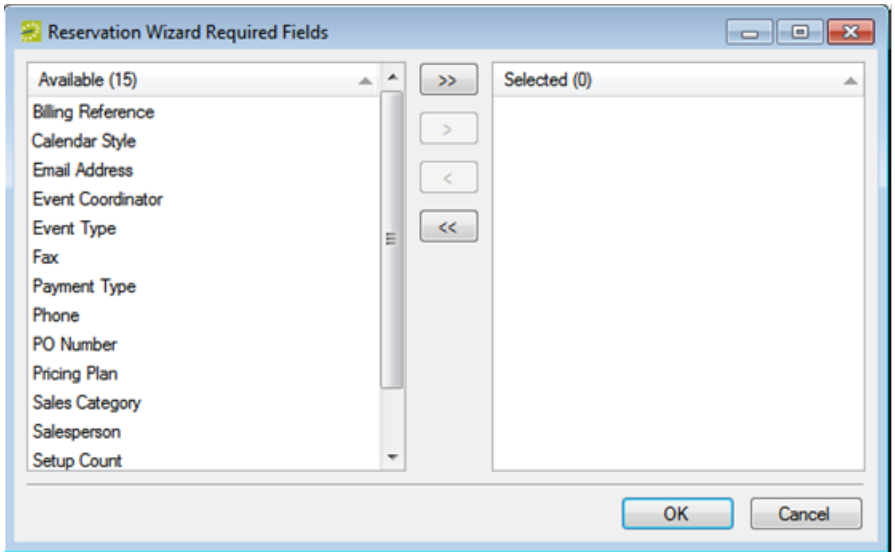
CHAPTER 125: Reservation Wizard Required Fields

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.

Configure Required Fields in the Reservation Wizard

To configure required fields in the Reservation Wizard, follow these steps:

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.



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**.

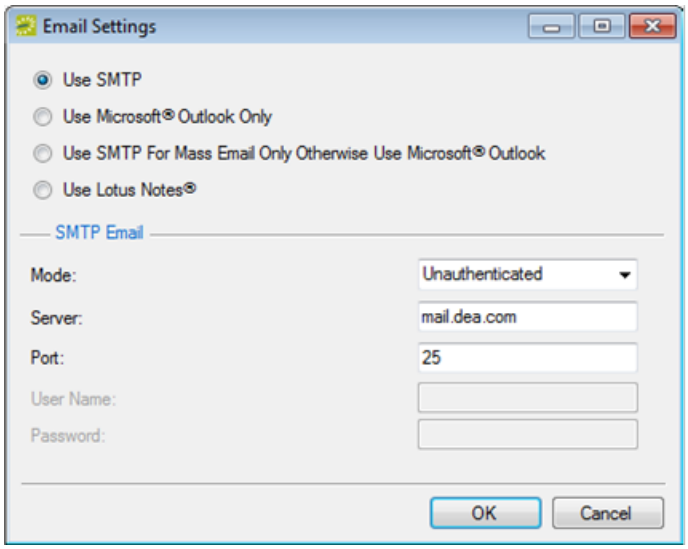
CHAPTER 126: Configure Email Settings

The system administration email settings determine how your EMS implementation interacts with your organization's email standard. After installation of your EMS system, you must configure these settings.

To configure email settings, follow these steps:

1. On the EMS menu bar, click **System Administration** > **Settings** > **Email Settings**.

   The Email Settings dialog box opens.

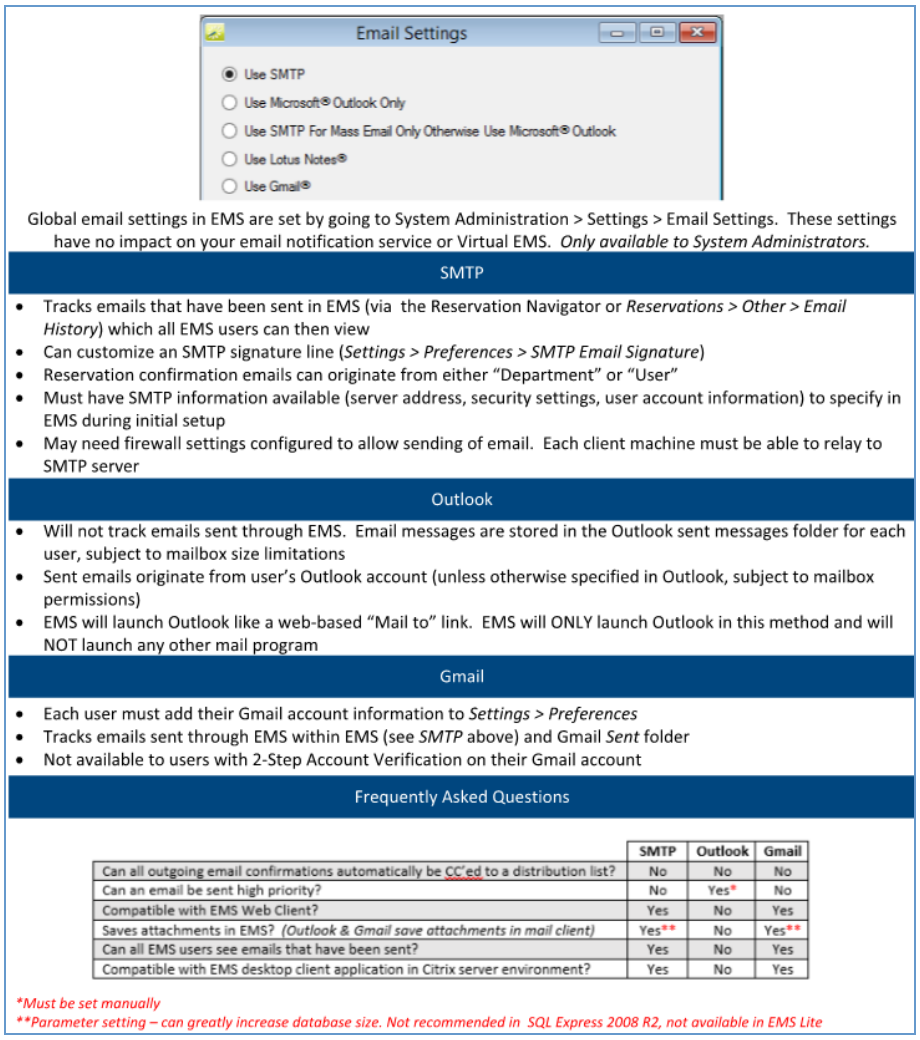


   Email Settings Dialog Box

2. Use one of the following methods to configure email:

   - Leave **Use SMTP** selected, and then enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.
   - Select **Use Microsoft Outlook Only**.
   - Select **Use 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.)



Global email settings in EMS are set by going to System Administration > Settings > Email Settings. These settings have no impact on your email notification service or Virtual EMS. *Only available to System Administrators.*

SMTP

- Tracks emails that have been sent in EMS (via the Reservation Navigator or *Reservations > Other > Email History*) which all EMS users can then view
- Can customize an SMTP signature line (*Settings > Preferences > SMTP Email Signature*)
- Reservation confirmation emails can originate from either "Department" or "User"
- Must have SMTP information available (server address, security settings, user account information) to specify in EMS during initial setup
- May need firewall settings configured to allow sending of email. Each client machine must be able to relay to SMTP server

Outlook

- Will not track emails sent through EMS. Email messages are stored in the Outlook sent messages folder for each user, subject to mailbox size limitations
- Sent emails originate from user's Outlook account (unless otherwise specified in Outlook, subject to mailbox permissions)
- EMS will launch Outlook like a web-based "Mail to" link. EMS will ONLY launch Outlook in this method and will NOT launch any other mail program

Gmail

- Each user must add their Gmail account information to *Settings > Preferences*
- Tracks emails sent through EMS within EMS (see *SMTP* above) and Gmail *Sent* folder
- Not available to users with 2-Step Account Verification on their Gmail account

Frequently Asked Questions

	SMTP	Outlook	Gmail
Can all outgoing email confirmations automatically be CC'ed to a distribution list?	No	No	No
Can an email be sent high priority?	No	Yes*	No
Compatible with EMS Web Client?	Yes	No	Yes
Saves attachments in EMS? *(Outlook & Gmail save attachments in mail client)*	Yes**	No	Yes**
Can all EMS users see emails that have been sent?	Yes	No	Yes
Compatible with EMS desktop client application in Citrix server environment?	Yes	No	Yes

**Must be set manually*
***Parameter setting – can greatly increase database size. Not recommended in SQL Express 2008 R2, not available in EMS Lite*

3. Click **OK**.

CHAPTER 127: Set the Global Email Preference to SMTP and My Personal Email Preference to Outlook

Set the Global Email Preference to SMTP

To set the global email preference to SMTP, follow these steps:

1. Log in to EMS Desktop Client as an Administrator.
2. Select **System Administration** > **Settings** > **Email Settings**.
3. Select **Use SMTP**.
4. Enter your SMTP information.

Set Your Personal Email Preference to Outlook

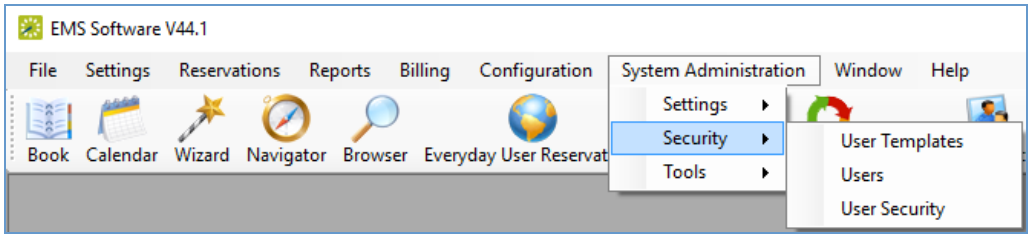
To set your personal email preference to Outlook, follow these steps:

1. Select **Settings** > **Preferences**.
2. De-select **Use Global Email Settings**.
3. Select **Use Microsoft Outlook**.

CHAPTER 128: System Administration > 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.

You can access the security settings under **System Administration** > **Security**. The Security menu enables you to control security (what users have access to) through user templates (and processes, users, and user secruity.



Security Menu

The following topics provide information about the security configuration features found in System Administration:

- Overview of User Processes
- Configure Users
- Configure User Templates
- Configure Academic User Templates
- Configure User Security for Multiple User Accounts

Plan Your Security Configuration

You can fine-tune security by configuring actions users should be allowed to take, information they can see, and rooms and buildings they can book. We recommend you configure security for EMS in the following phases:

- Configure Booking Templates (for instructions, see Configure Everyday User Templates)
- Configure User Templates (and associate them with User Processes)
- Configure Users (using User Templates as needed)

Concept: You can grant User Access to Categories, Processes, Buildings, Rooms, Statuses, and Queries by Group with User Templates

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 entirely from "scratch," or you can copy an existing user template, and then make the necessary edits to configure another template.

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CHAPTER 129: 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.

Note:
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.

Process	Permission Granted
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 Everyday User Template LDAP Groups	Shows the LDAP Groups tab in the Everyday User Process Template settings window. **Important!** 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.

Process	Permission Granted
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.

Process	Permission Granted
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.
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.

Everyday User Processes (Administrator and Guest Request)

Process	Permission Granted
Define and Edit Language Translations	Define and edit language translations in EMS Web App.
Define and Edit Web Menus	Define and edit web menus, including the creation and modification of links from EMS Web Appto other web pages.
Define and Edit Everyday User Process Templates	Define users' access to process templates that are used in EMS Web App.
Define and Edit Everyday User Security Templates	Define users' access to security templates that are used in EMS Web App.
Define and Edit Help Text	Define and edit help text, page labels, and so on.
Define and Edit Everyday Users	Define and edit the users who have access to EMS Web App.
Web Reservations	Run the Web Reservations Browser, which displays reservations entered into your EMS database through EMS Web App.

Hoteling Processes

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.
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
- EMS Campus Planning Interface Processes
- CPI Configuration Processes
- CPI Course Processes

- CPI Inquiry Processes
- CPI 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 Academic Planning.
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.
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.

EMS Campus Planning Interface Processes

Process	Permission Granted
Web Administrator	Grants access to the administrative functions after the user is logged in to the EMS Campus Planning Interface client.

CPI Configuration Processes

Process	Permission Granted
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.

CPI 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.

Process	Permission Granted
Edit Course Credit Hours	User can edit the specified course detail during Define & Edit mode or Dual mode.
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.

Process	Permission Granted
Preassign Scenarios	The user can create and run Pre-assignment 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.

CPI 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.

CPI Report Processes

Report Name	Permission Granted
< > Report	User can run and print the indicated report.

CHAPTER 130: Configure Users

Users are the people who log in to EMS Desktop Client whether they are making reservations or just using the system in a read-only capacity. When your EMS Desktop Client application is first installed, it is installed with a default user admin account with “admin” for both the User ID and password. As EMS recommends, for security reasons, after you log in to EMS Desktop Client 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.

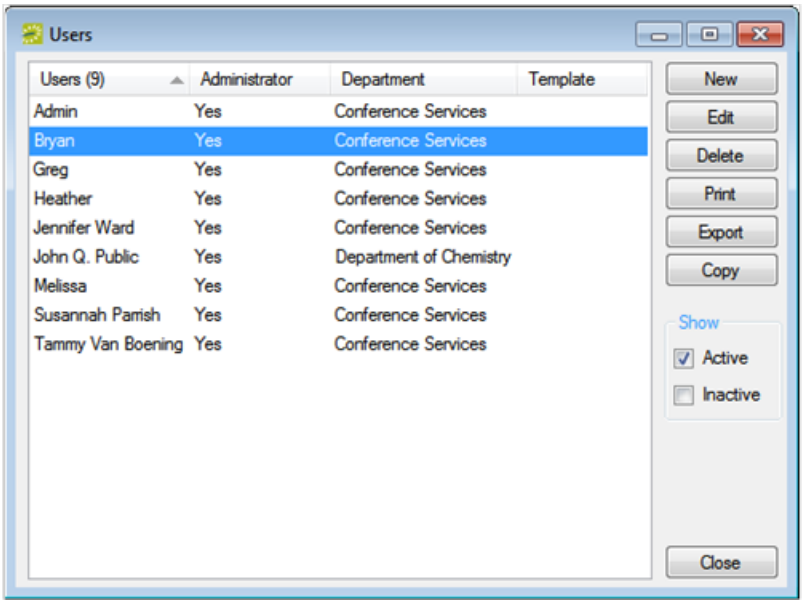
Note:
Instead of configuring user accounts individually, you can configure a template and then assign it all users you want to have the same security settings. **See Also:** Configure User Templates and Configure Academic User Templates.

This topic will provide information on the following:

- Configure an EMS Desktop Client User
- Set EMS Desktop Client User Event Security
- Set EMS Desktop Client User Categories
- Set EMS Desktop Client User Processes
- Configure EMS Desktop Client User Building Rights
- Specify EMS Desktop Client User Room Access
- Set User Status Options
- Set User Queries Option
- Set User Academic Security (EMS Campus Only)
- Set User Processes (EMS Campus Only)
- Export a List of User Accounts

Configure an EMS Desktop Client User

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.



Users Window

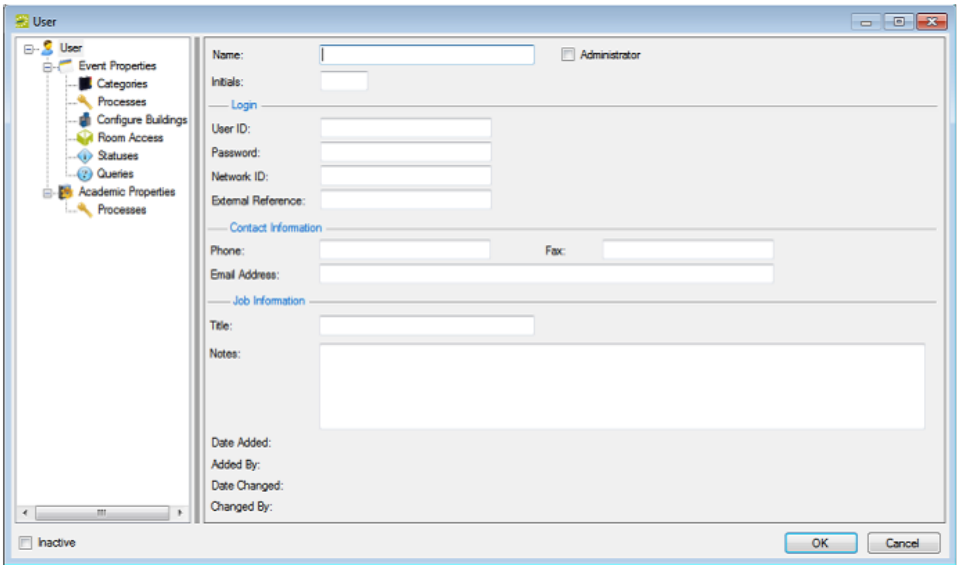
Note:

You can see all user accounts, regardless of status: under Show, click **Inactive**.

Note:

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.



User Dialog Box

3. Enter basic information for the new user in this dialog box and use the menu options to the left to define the user's access for each of the following: categories, processes, building configuration, room access, statuses and queries, and for EMS Campus, academic properties and processes (see the additional procedures in this topic).

User Fields

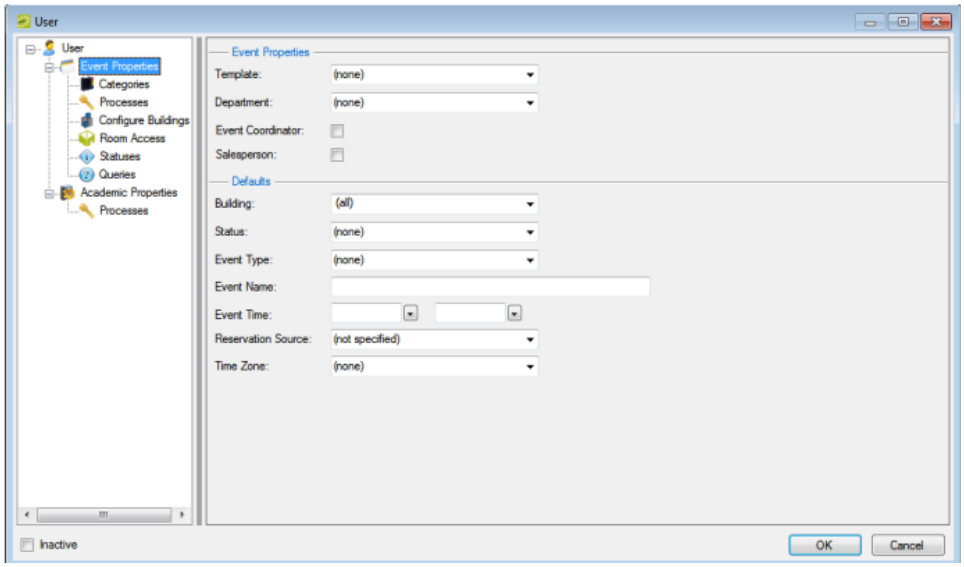
Field	Description
Name	First and last name for the user.
Administrator	Select this option if the user is to be an EMS Administrator. **Note:** If you select this option, then only Event Properties remains displayed on the User dialog box as an EMS administrative user has access to all EMS functions (categories, 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 Section	
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 Desktop Client 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.

Field	Description
	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.
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.

4. Click **OK**. The User dialog box closes. You return to the Users window with the newly configured user automatically selected.

Set EMS Desktop Client User Event Security

1. If needed, open the User dialog box. (**See Also:** Configure a User Account.)
2. Select Event Properties. The User dialog box is refreshed with options for the event security settings for the user.



User Dialog Box, Event Properties

3. Specify the event security settings for the user.

Event Properties Field

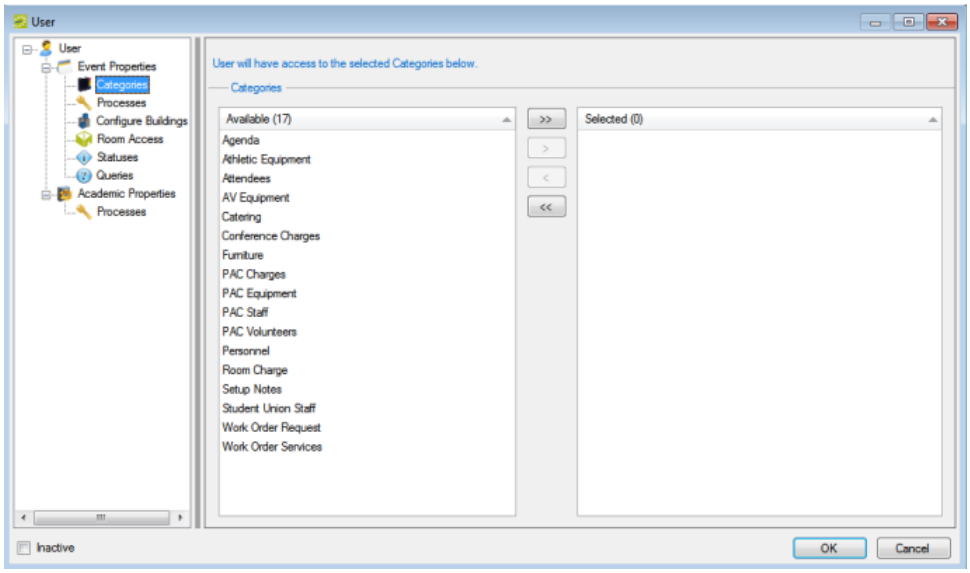
Field	Description
Event Properties Section	
Template	If you select a template, then only the Event Properties options remain available. The categories, processes, buildings, rooms, statuses, and queries are automatically assigned to the user based on the selected template. **See Also:** Configuring User Templates.
Defaults Section	
	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.

Set EMS Desktop Client User Categories

You specify the categories that a user can add to a booking or edit for a booking on the Categories tab.

1. From the User Dialog Box, select **Categories**. The User dialog box is refreshed with a list of all the active categories that you can select for the user.



User Dialog Box, Categories

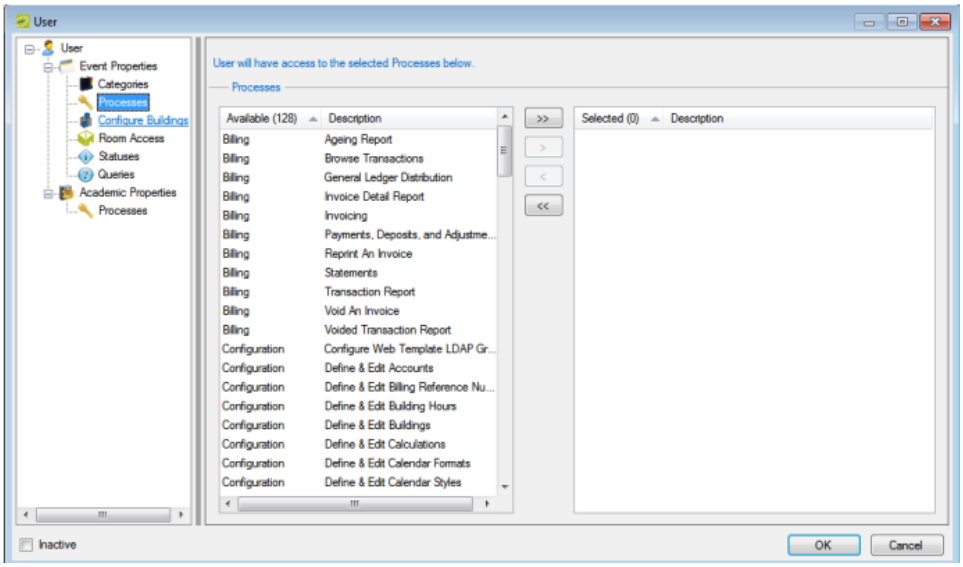
2. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

> **Note:**
> To add these categories to a booking, a user needs access to the Edit Booking Details process.

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.

Set EMS Desktop Client User Processes

1. From the User dialog box, select **Processes**. The User dialog box is refreshed with a list of all the processes that you can select for the user.



User Dialog Box, Processes

2. 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.

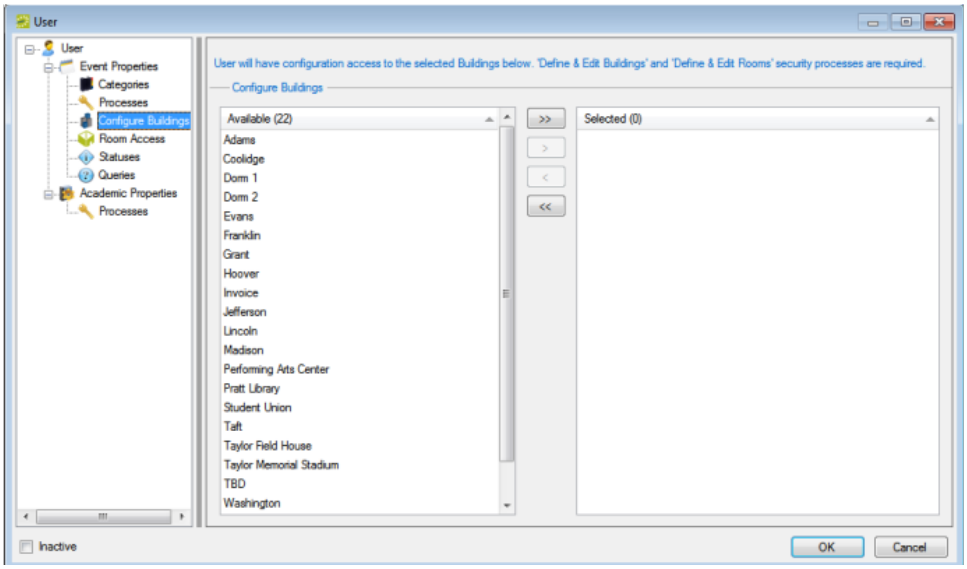
> **Note:**
> For an explanation of each process, **See Also:** Overview of User Processes.

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.

Configure EMS Desktop Client User Building Rights

You specify the building configuration rights for a user on the **Buildings** tab.

1. From the User dialog box, select **Configure Buildings**. The User dialog box is refreshed with a list of all the buildings that you can select for the user.



User Dialog Box, Buildings

2. 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.

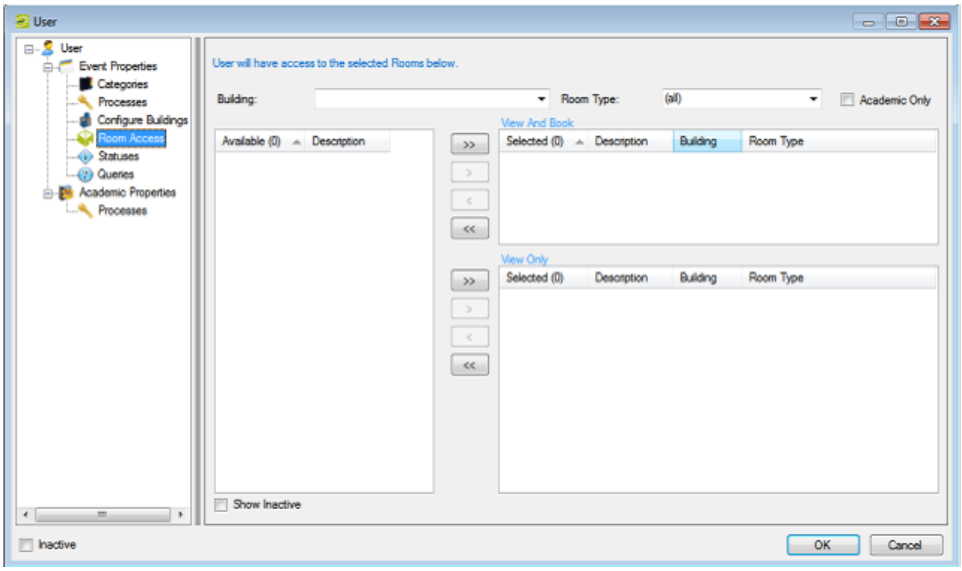
> **Note:**
> Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings.

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.

Specify EMS Desktop Client User Room Access

You specify the rooms to which a user has access on the Room Access tab.

1. From the User dialog box, select **Room Access**. The User dialog box is refreshed a options for searching for the rooms to add to the user account.



User Dialog Box, Room Access

2. Search for the rooms to which the user is to have access by doing one or both of the following and the Available list will update with a list of rooms that meet your search criteria:
   - On the Building drop-down list, select (all) buildings, a specific building, an area, or a view.
   - On the Room Type drop-down list, leave the default value of (all), or select a specific room type.
3. 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.

> **Note:**
> 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.

> **Note:**
> 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.

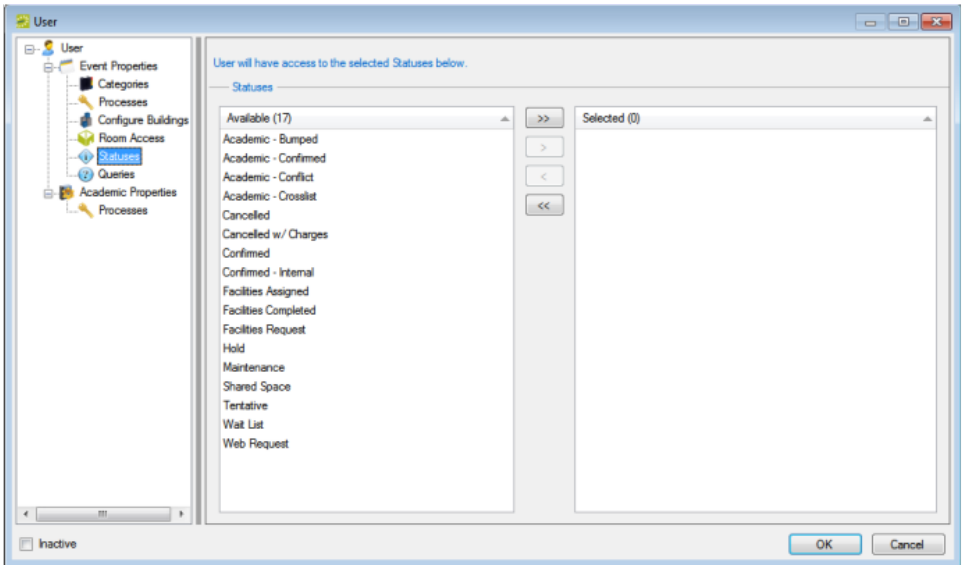
- View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

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.

Set User Status Options

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. From the User dialog box, select **Statuses**. The User dialog box is refreshed with a list of all the active event statuses that you can select for the user.



User Dialog Box, Statuses

2. 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.

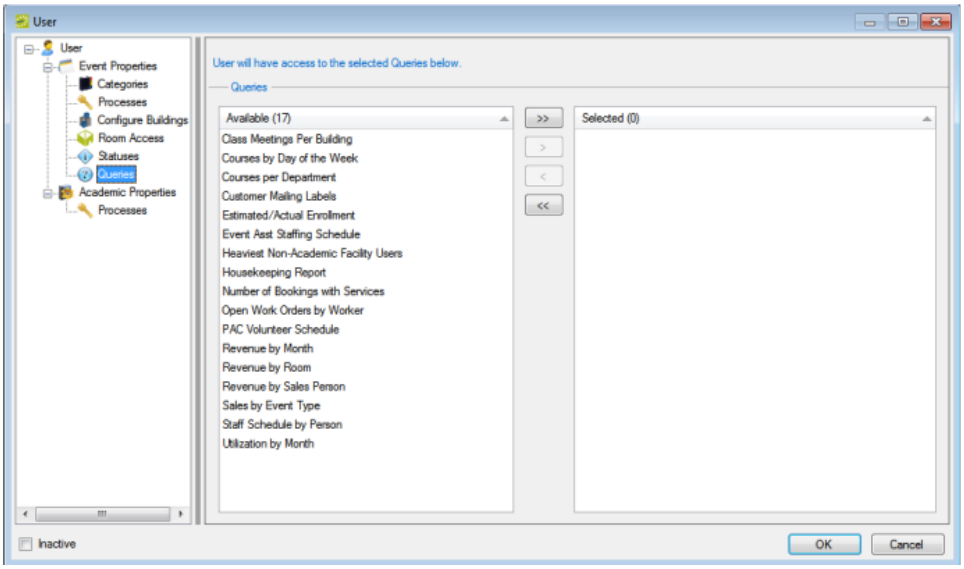
3. Continue with any other configuration for the user as needed; otherwise, click **OK** to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

Set User Queries Option

You specify the queries that a user can run on the **Queries** tab.

> **Note:**
> You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. From the User dialog box, select **Queries**. The User dialog box is refreshed with a list of all the defined queries that you can select for the user account.



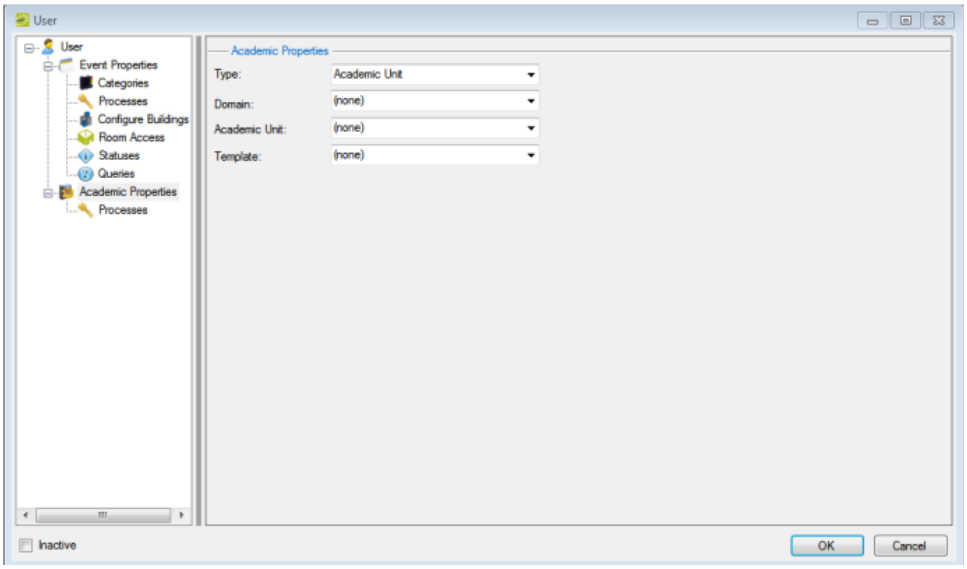
User Dialog Box, Queries

2. 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.

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.

Set User Academic Security (EMS Campus Only)

1. From the User dialog box, select **Academic Properties**. The User dialog box is refreshed with options for the academic security settings for the user.



User Dialog Box, Academic Properties (EMS Academic Planning Only)

2. Specify the academic security settings for the user.

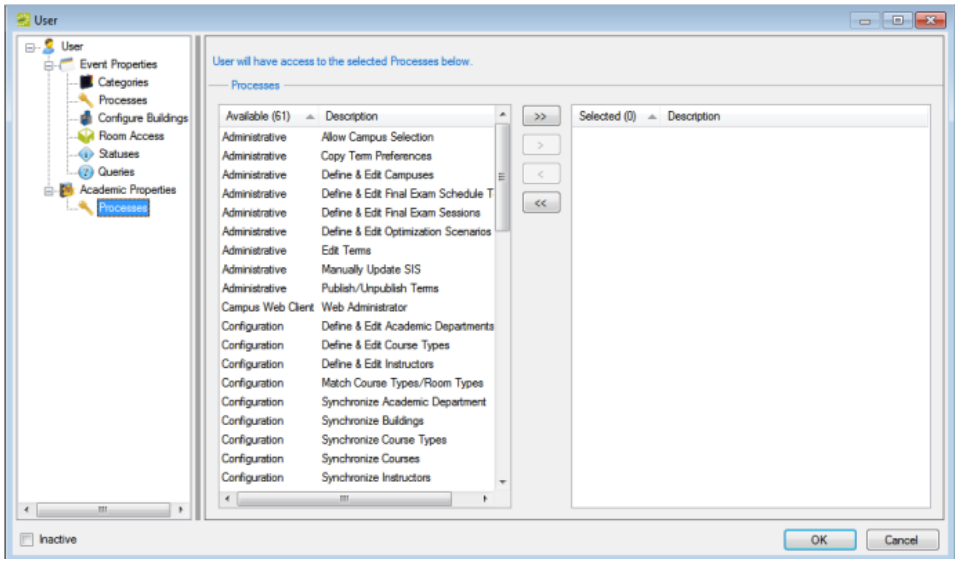
Academic Security Fields

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 Also:**Configuring Academic User Templates.

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.

Set User Processes (EMS Campus Only)

1. From the User dialog box, 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.



User Dialog Box, Academic Processes (EMS Academic Planning Only)

2. 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.

> **Note:**
> For an explanation of each process, **See Also:** Academic Scheduling Process.

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.

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, file type is *.xls.
3. You can change the file name, and save the file in a location of your choosing.

CHAPTER 131: Configure 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. **See Also:** Learn more about how EMS classifies different types of users.

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.

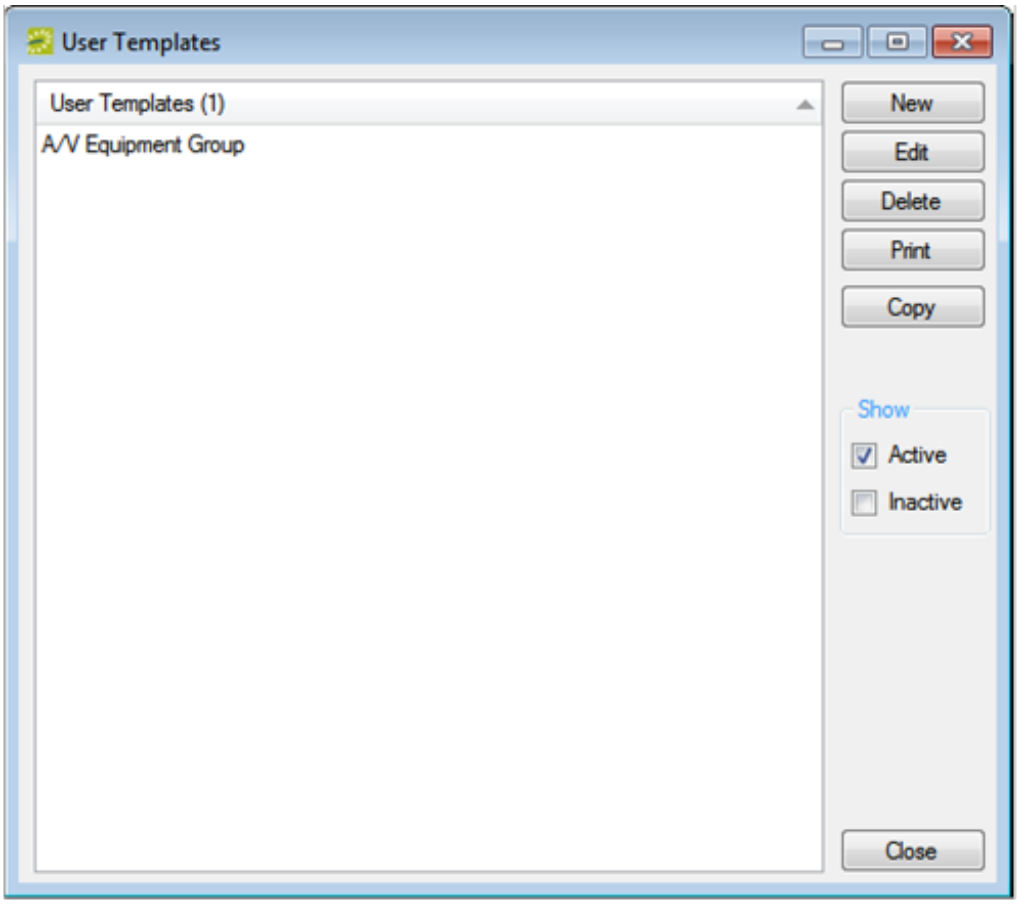
If the users you are configuring are also EMS Academic Planning users, then you must also define academic user templates for these users. **See Also:** Configure Academic User Templates.

This topic provides information on the following:

- Configure a User Template
- Specifying Categories
- Configure Processes
- Configure Buildings
- Specify Room Access
- Specify Statuses
- Specify Queries

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 currently configured in your EMS database and that have a status of Active.

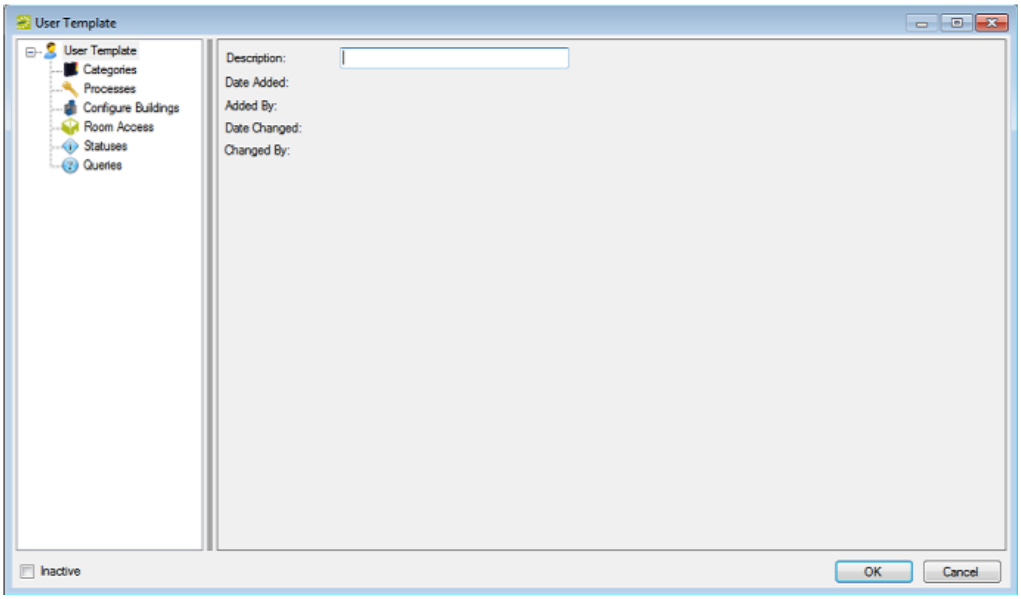


User Template Window

Note:
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.



User Template Dialog Box

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

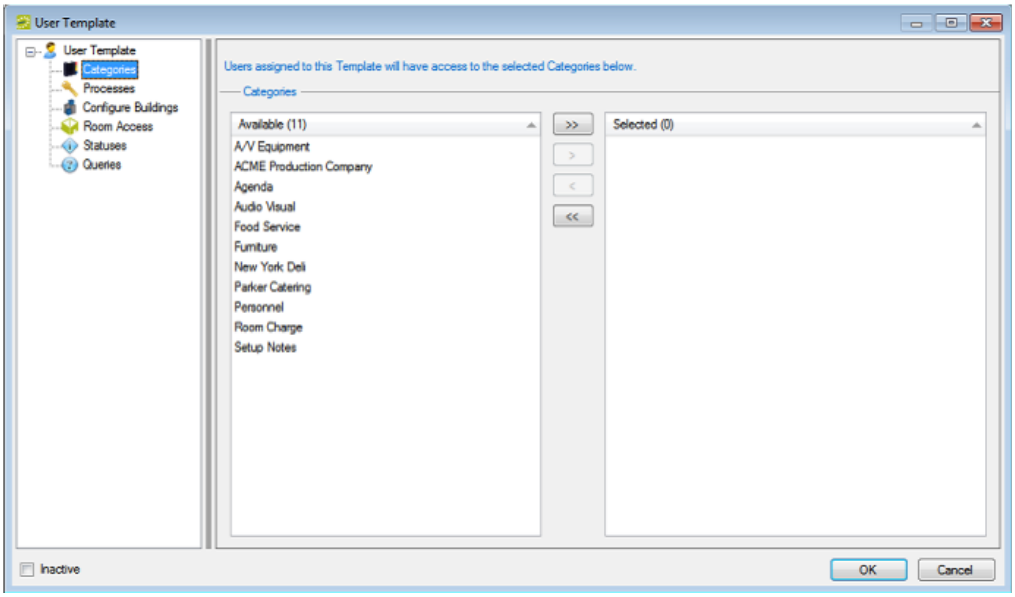
> **Note:**
> The name or description can be a maximum of 50 characters, including spaces.

4. Defining the user access for each of the following: categories, processes, building configuration, room access, statuses, and queries.
5. Click **OK**. The User Template dialog box closes. You return to the User Templates window with the newly configured template automatically selected.

Specifying 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.
2. Select **Categories**. The User Template dialog box is refreshed with a list of all the active categories you can select for the user template.



User Template Dialog Box

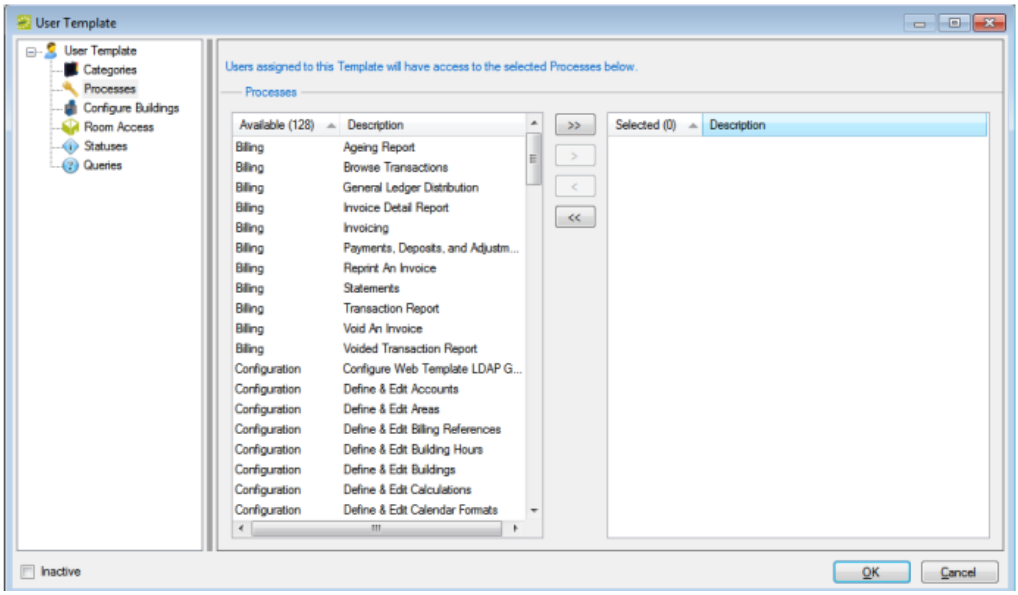
3. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

> **Note:**
> 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.

Configure Processes

1. From the User Template dialog box, select **Processes**. The User Template dialog box is refreshed with a list of all the processes that you can select for the user template.



User Template Dialog Box

2. 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.

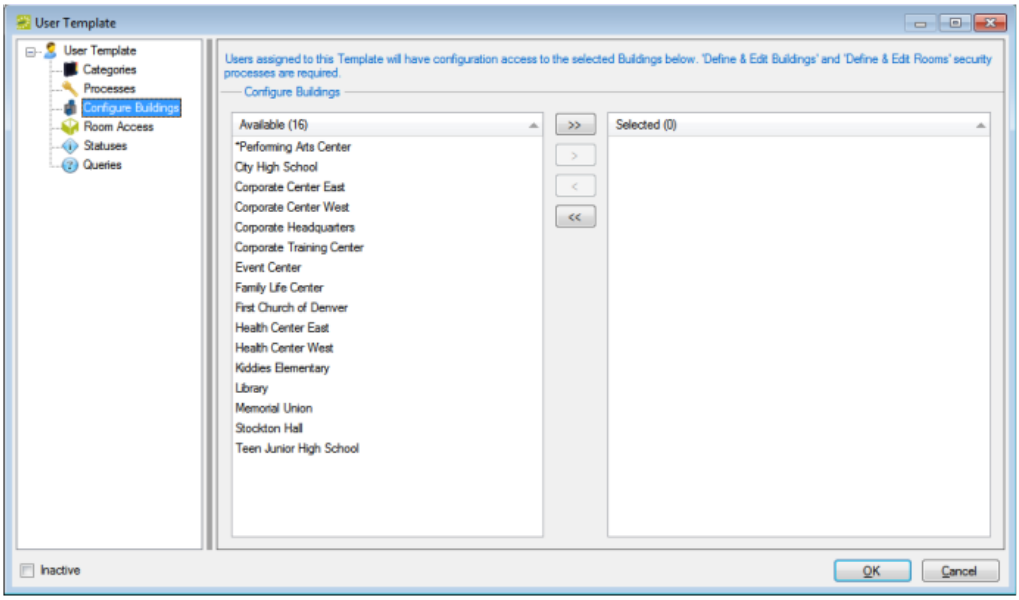
> **Note:**
> For an explanation of each process, see also Overview of User Processes

3. 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. From the User Template dialog box, select **Buildings**. The User Template dialog box is refreshed with a list of all the buildings you can select for the user template.



User Template Dialog Box

2. 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.

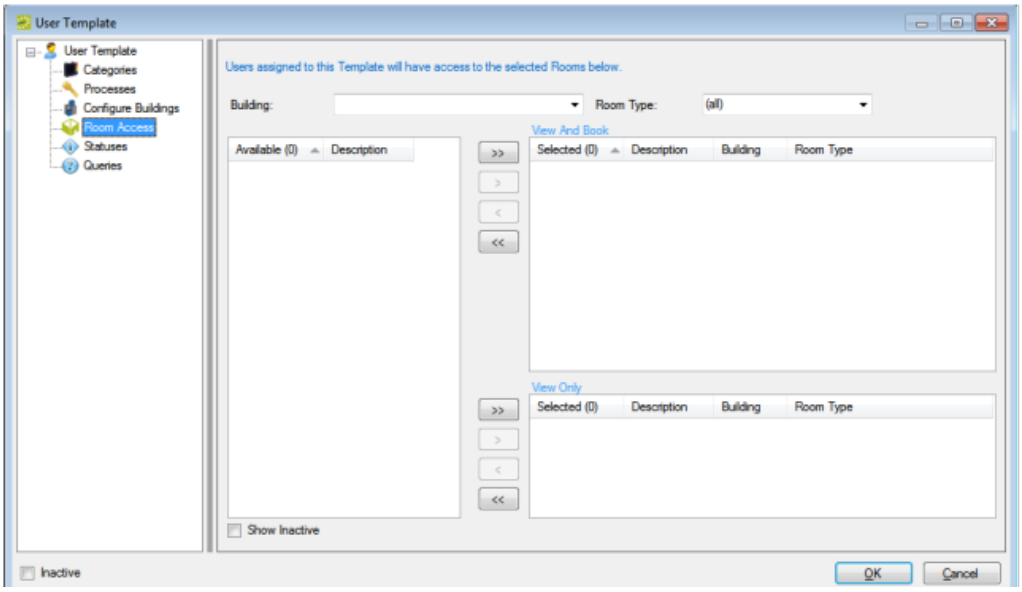
Note:
Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings and/or rooms.

3. 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.

Specify Room Access

You specify the room access for a user who is assigned to this template on the **Room Access** tab.

1. From the User Template dialog box, select **Room Access**. The User Template dialog box is refreshed a options for searching for the rooms to add to the user template.



User Template Dialog Box

2. Search for the rooms to which to add to the user template by doing one or both of the following and the Available list will update with a list of rooms that meet your search criteria:
   - On the Building drop-down list, select (all) buildings, or select a specific building.
   - On the Room Type drop-down list, leave the default value of (all), or select a specific room type.
3. 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.

> **Note:**
> 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.

> **Note:**
> 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;

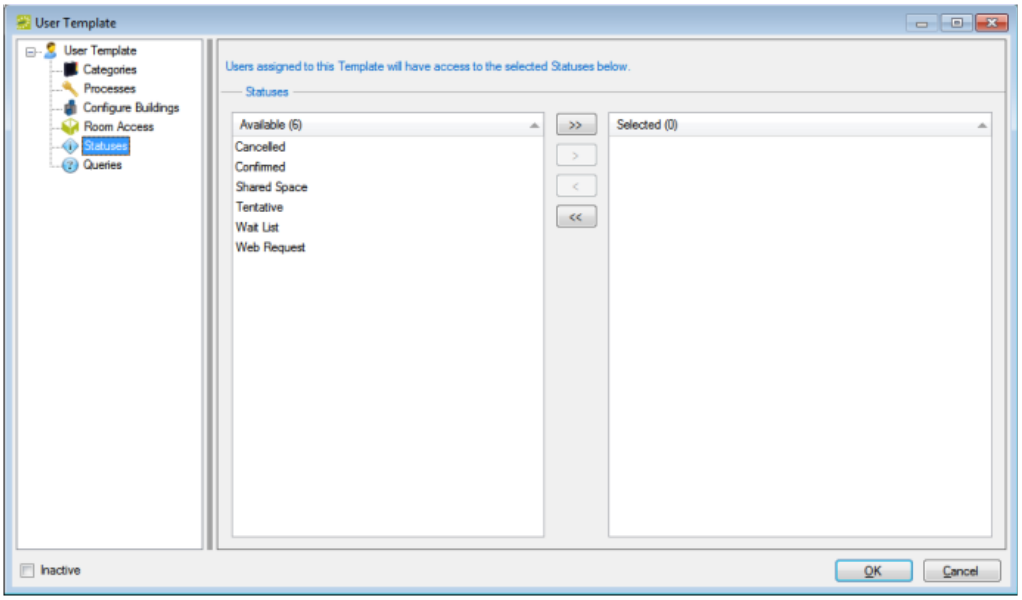
however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

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.

Specify 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. From the User Template dialog box, select **Statuses**. The User Template dialog box is refreshed with a list of all the active event statuses you can select for the user template.



User Template Dialog Box

2. 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.
3. 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.

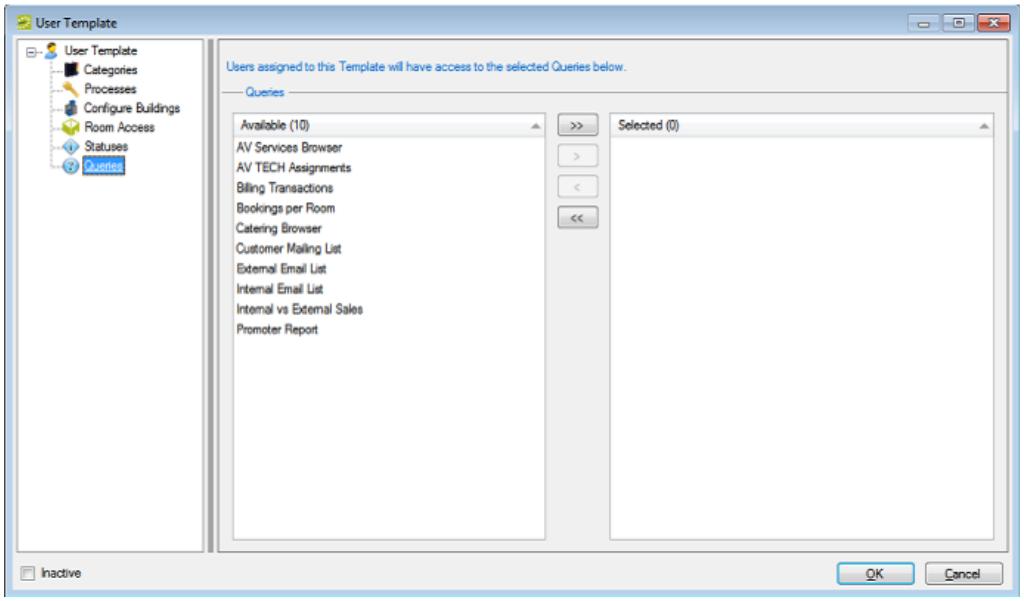
Specify Queries

You specify the queries that a user who is assigned to this template can run on the **Queries** tab.

Note:

You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. From the User Template dialog box, select **Queries**. The User Template dialog box is refreshed with a list of all the defined queries you can select for the user template.



User Template Dialog Box

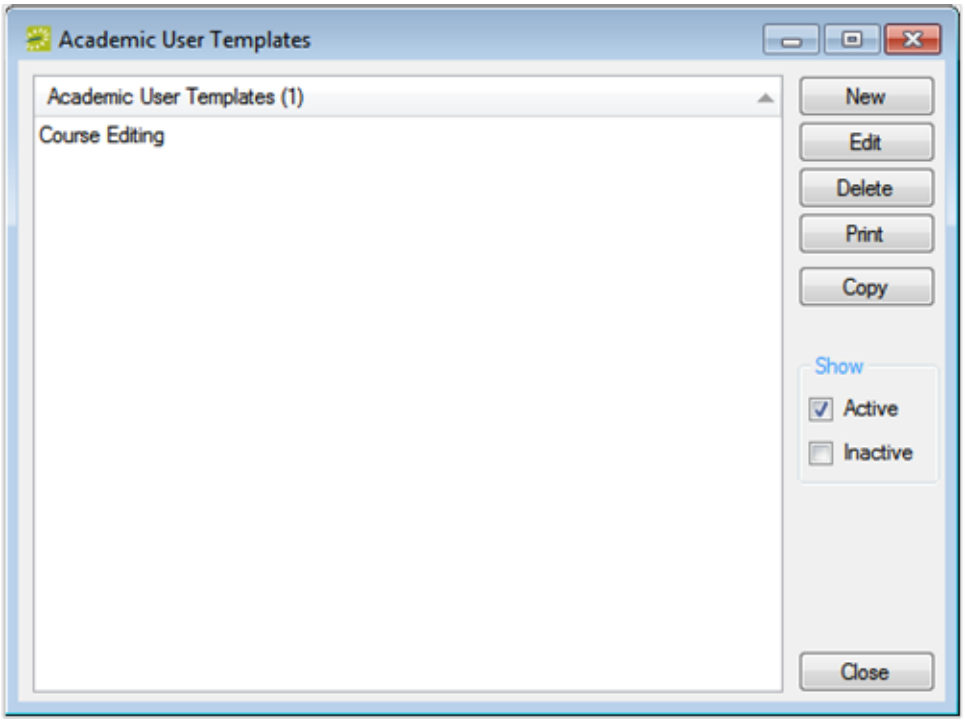
2. On the Available list, select the query or CTRL-click to select the multiple queries to which a user is to have access, and then click the Move button (>) to move the selected queries to the Selected list.
3. Continue with any other configuration for the template as needed; otherwise, click **OK** 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.

CHAPTER 132: Configure Academic User Templates

If the EMS users who are to have the same security settings are also EMS Academic Planning 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 Academic Planning 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.

1. On the EMS menu bar, click **System Administration** > **Security** > **Academic User Templates**.

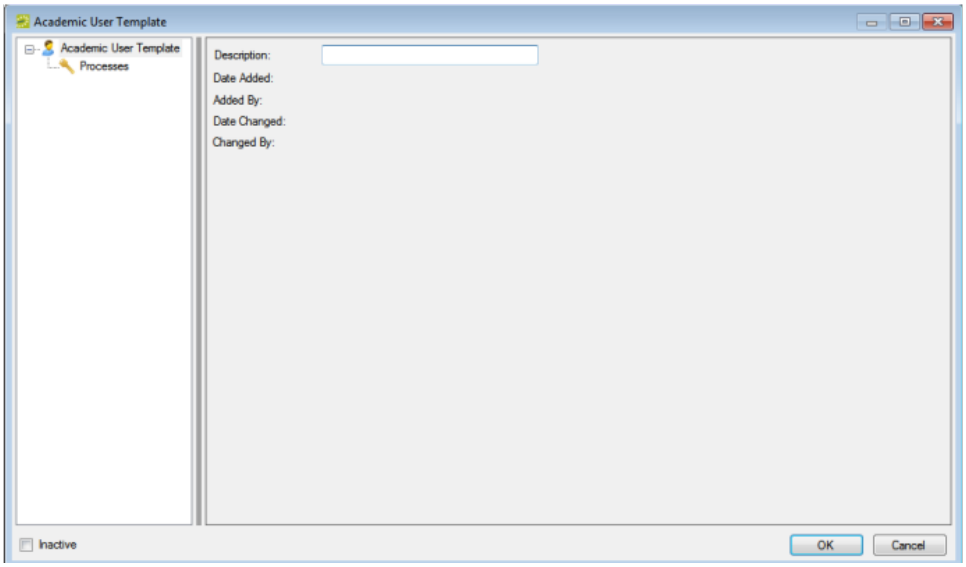
   The Academic User Templates window opens. This window lists all the academic user templates that are currently configured in your EMS database and that have a status of **Active**.



Academic User Templates Window

> **Note:**
> 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.



Academic User Template dialog box

3. In the Description field, enter a name or description for the new academic user template.

> **Note:**
> 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.

> **Note:**
> For an explanation of each process, see Overview of Academic User Processes.

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.

CHAPTER 133: Configure 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.

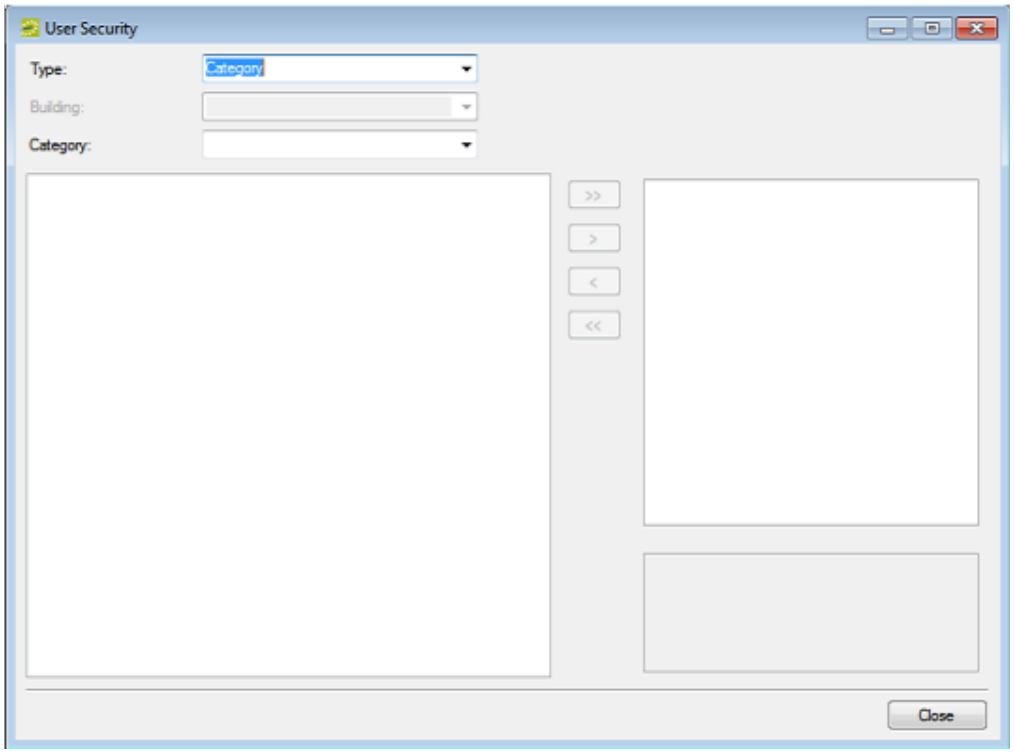
This topic will provide information that will allow you to:

- Configure User Security for Multiple User Accounts
- Configure Mass User Security for a Category
- Configure Mass User Security for a Process
- Configure Mass User Security for a Room
- Configure Mass User Security for a Status

> **Note:**
> 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 Guide for detailed information.

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.

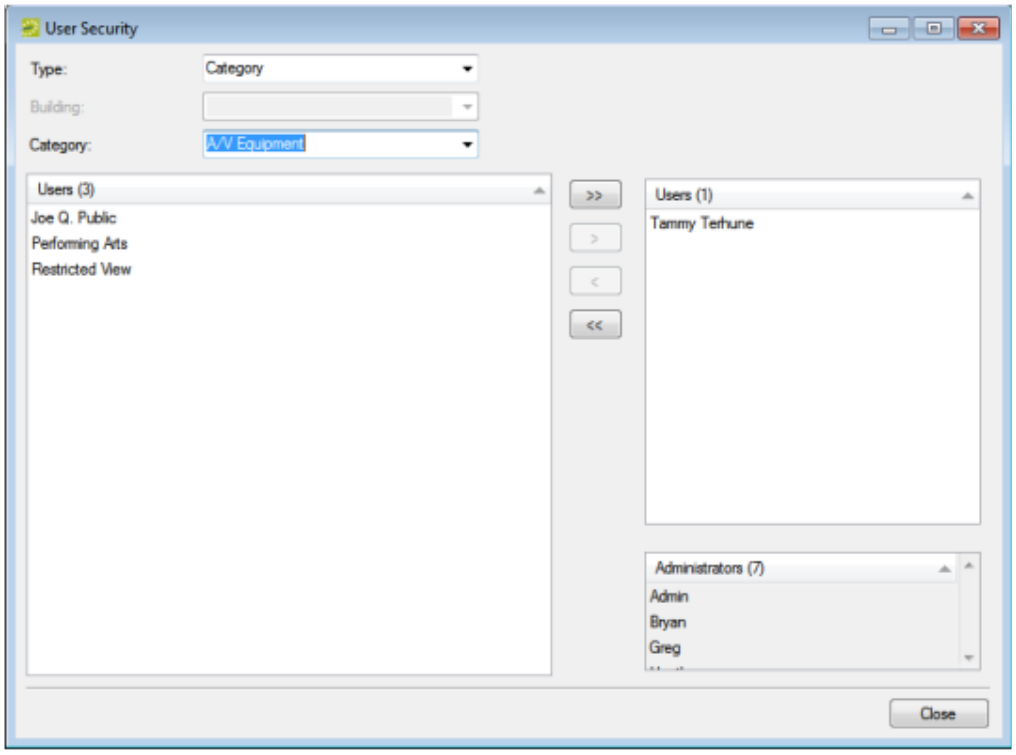


User Security Dialog Box

2. On the Type drop-down list, select the item for which you are configuring user security — Category, Process, Room, or Status.

Configure Mass User Security for a Category

1. On the Category drop-down 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.)

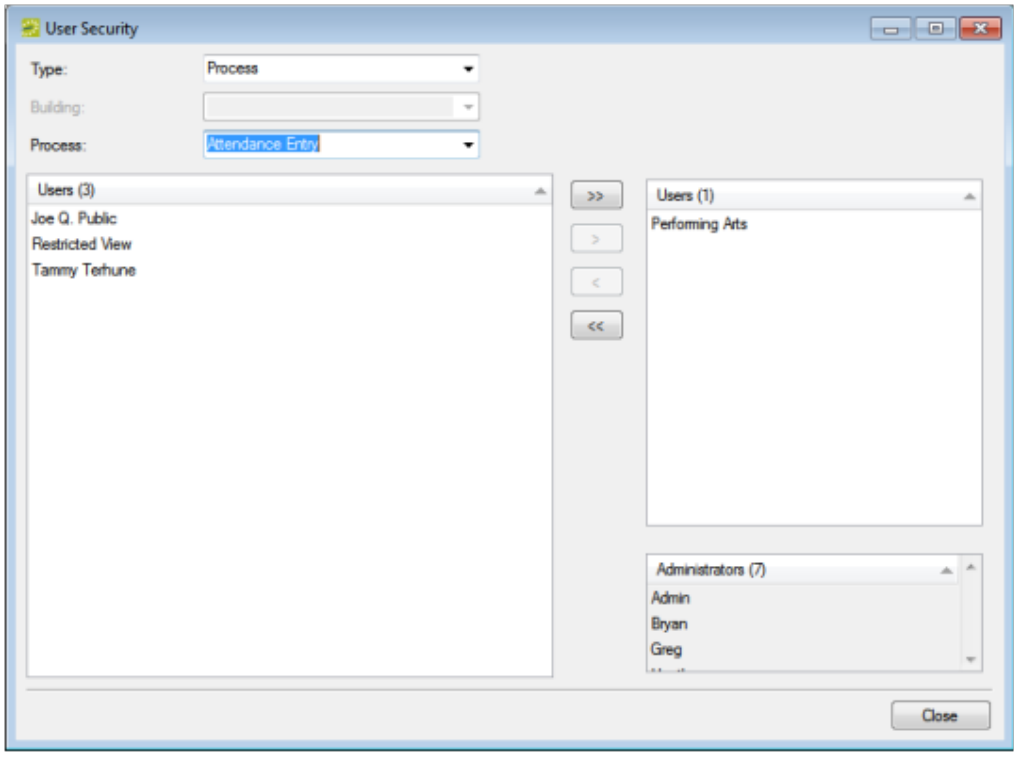


User Security Dialog Box, Categories

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.

Configure Mass User Security for a Process

1. On the Process drop-down 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.)

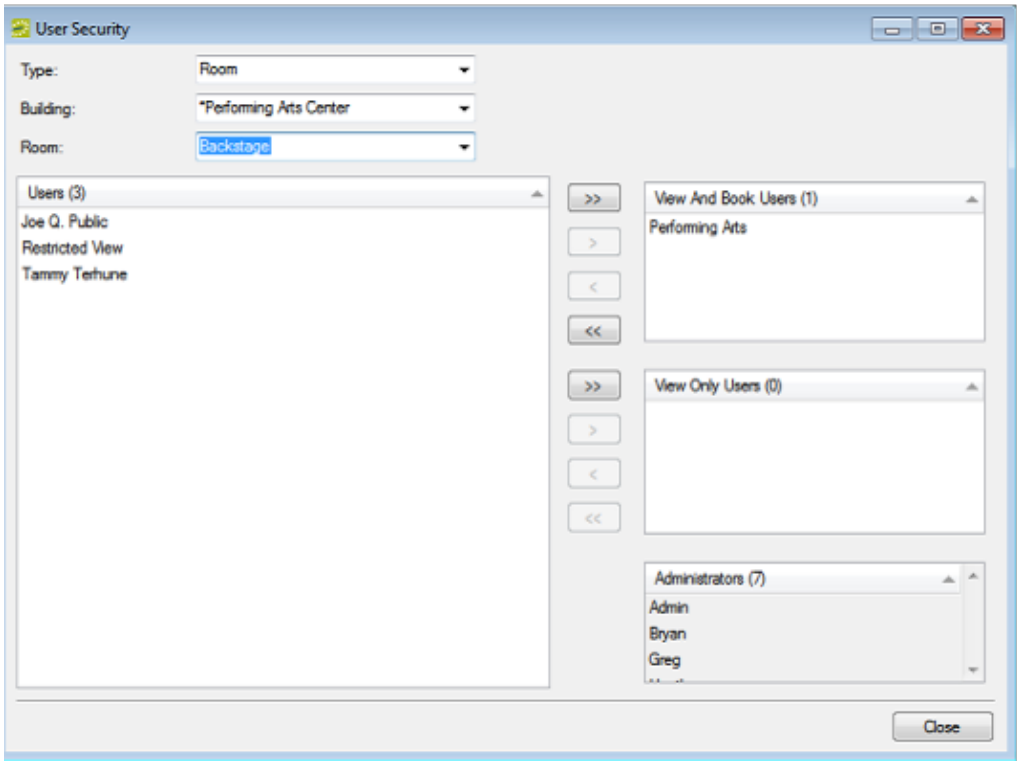


User Security Dialog Box, Processes

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.

Configure Mass User Security for a Room

1. On the Building drop-down list, select a building, and then on the Room drop-down 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.)



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.

> **Note:**
> 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.

> **Note:**
> 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.

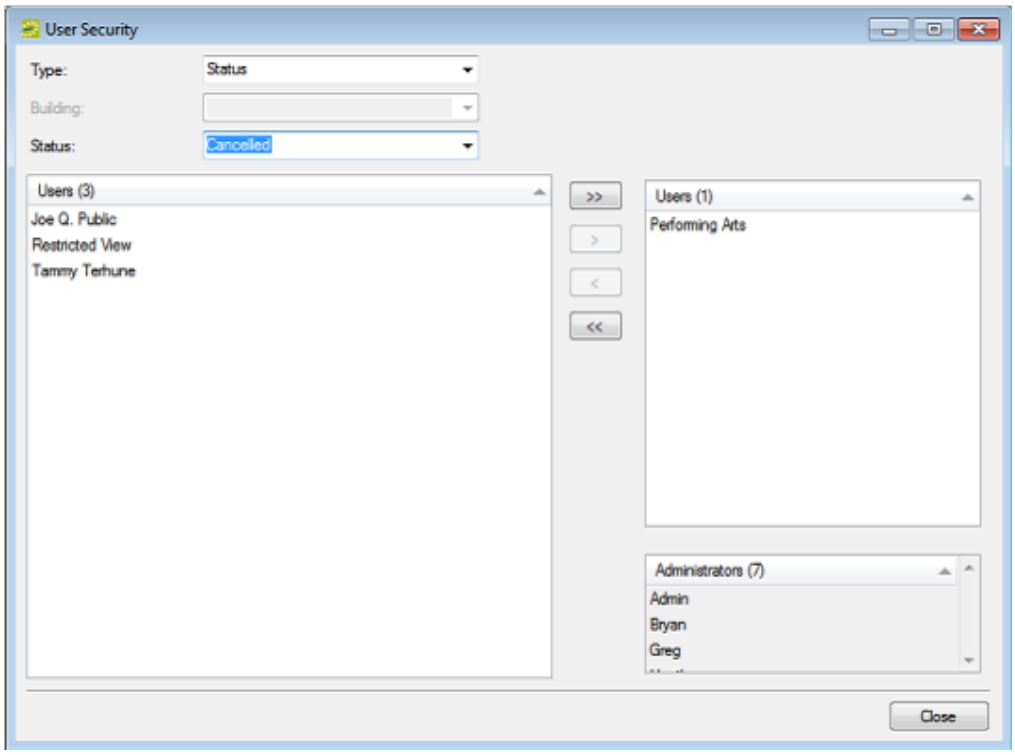
- View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room;

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.

Configure Mass User Security for a Status

1. On the Status drop-down 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.)



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.

CHAPTER 134: System Administration > Tools

You have several tools at your disposal in EMS Desktop Client to assist you in your administrative duties. These include a tool to update various group attributes, such as the pricing plans or account name. You can also manage saved reports, view logged-in users, and if necessary, log these users off your EMS system, email logged-in users, and delete old data in your EMS database.

You can access these system administration tools under **System Administration** > **Tools**.

The following topics provide information about the tools found in System Administration:

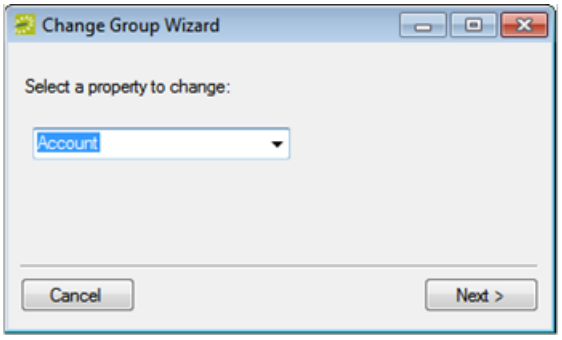
- Change Group Wizard
- Change Reservation Wizard
- Room Administration Wizard
- Manage Saved Reports
- Override Existing Bookings Utility
- Import Reservation Utility
- View and Email Logged-In Users
- Delete Old Data
- Currency Configuration Wizard
- Booking Move/Change Status Wizard
- Video Display Interface
- Migrate Data

CHAPTER 135: 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.

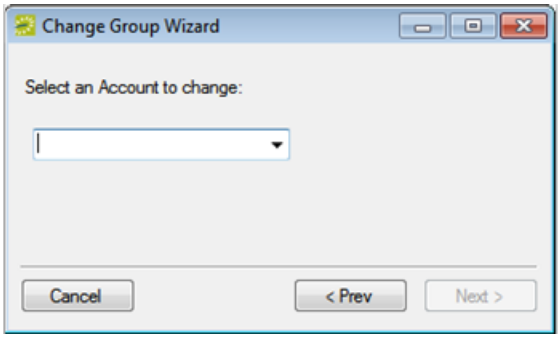
The following procedure is written from the perspective of changing an account, but by analogy, you can follow this procedure to change any of the allowed properties for your group records. To update group attributes using the Change Group Wizard, follow these steps:

1. On the EMS menu bar, click **System Administration** > **Tools** > **Change Group Wizard**. The Change Group Wizard opens.



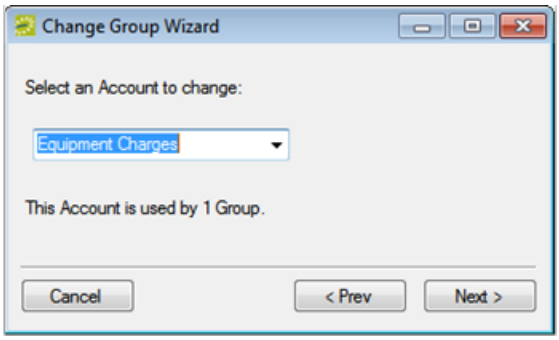
Change Group Wizard

2. Select Account (the property to change), and then click Next. You are prompted to select an account to change.



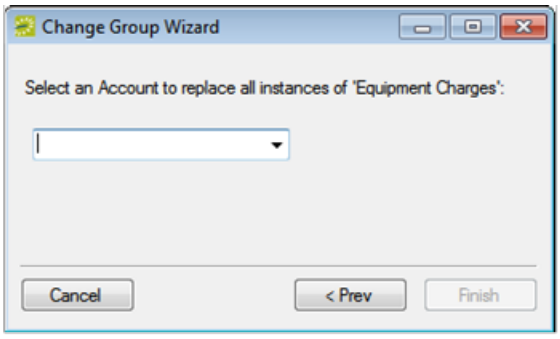
Change Group Wizard

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.



Change Group Wizard

4. Click **Next**. The Change Group Wizard prompts you to select an account to replace all instances of Equipment Charges.



Change Group Wizard

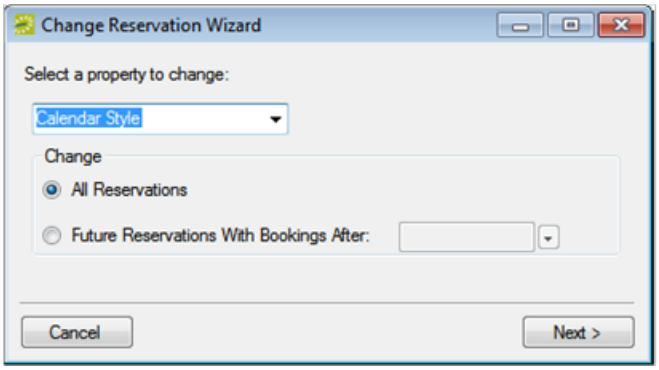
5. Select the appropriate account, for example, Denver A/V, and then click Finish.
6. A Property Changed message opens, indicating that the property was changed, and the number of groups that were affected.
7. Click OK to close the message and the Change Group Wizard.

CHAPTER 136: 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 Everyday User.

> **Note:**
> 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.

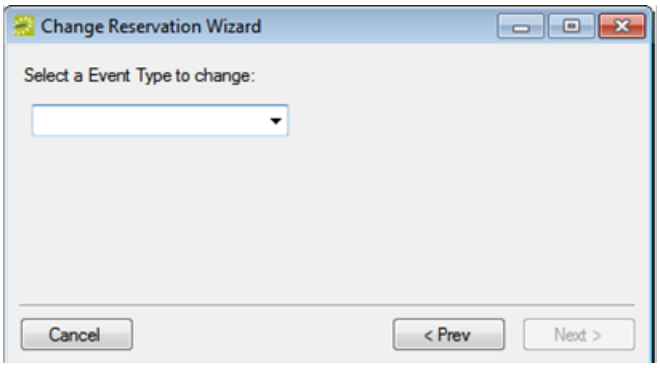


Change Reservation Wizard

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.

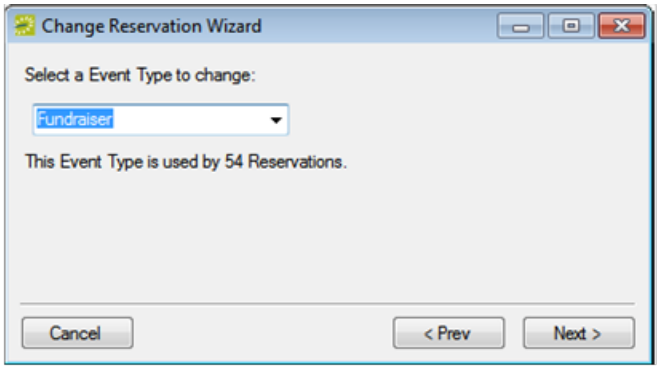
> **Note:**
> The date must be greater than or equal to the current day's date.

3. Click Next. The Change Reservation Wizard prompts you to select an event type to change.



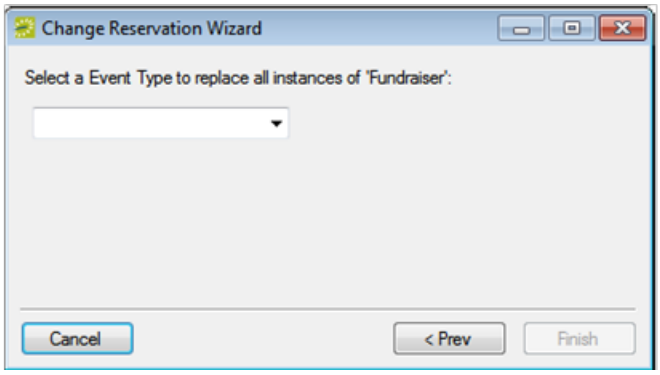
Selecting an Event in the Change Reservation Wizard

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.



Change Reservation Wizard

5. Click Next. The Change Reservation Wizard prompts you to select an event type to replace all instances of “Fundraiser.”



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.

CHAPTER 137: Room Administration Wizard

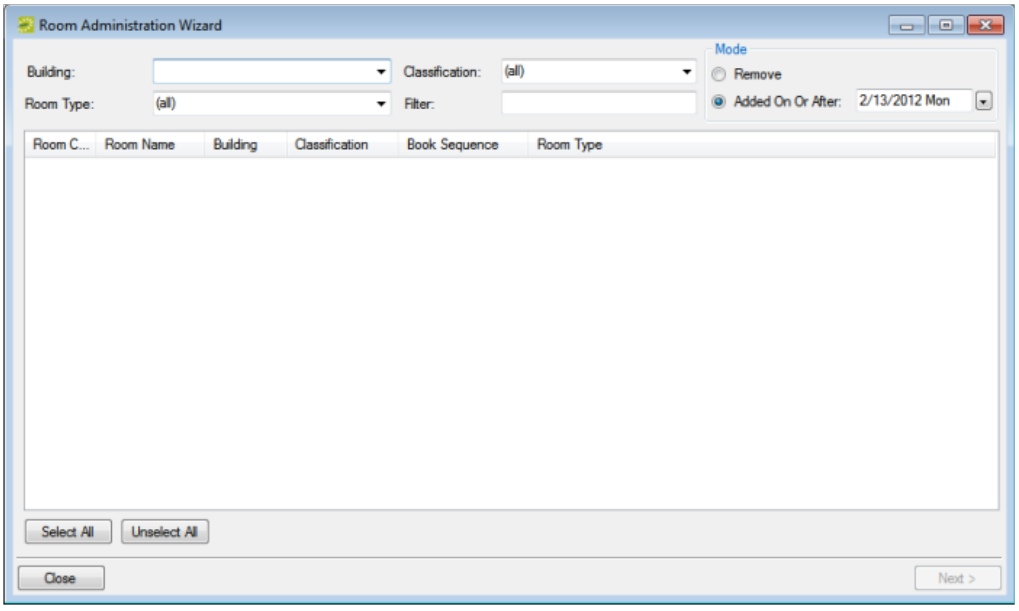
You use the Room Administration Wizard to identify new rooms that have been configured in your EMS database and add these rooms to or delete these rooms from public views, notification rules, group notification rules, users, user templates, Everyday User process templates, and if applicable, kiosk profiles. (If you are using the Room Administration Wizard in EMS Academic Planning, then you can add specific rooms to or delete specific rooms from domains and/or academic units.)

This topic will provide information that will allow you to do the following:

- Use the Room Administration Wizard
- Use the Room Administration Wizard to Add Rooms
- Use the Room Administration Wizard to Delete Rooms

Use the Room Administration Wizard

1. On the EMS menu bar, click **System Administration** > **Tools** > **Room Administration Wizard**. The Room Administration Wizard opens.



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".

> **Note:**
> The default value for the date is the current day's date.

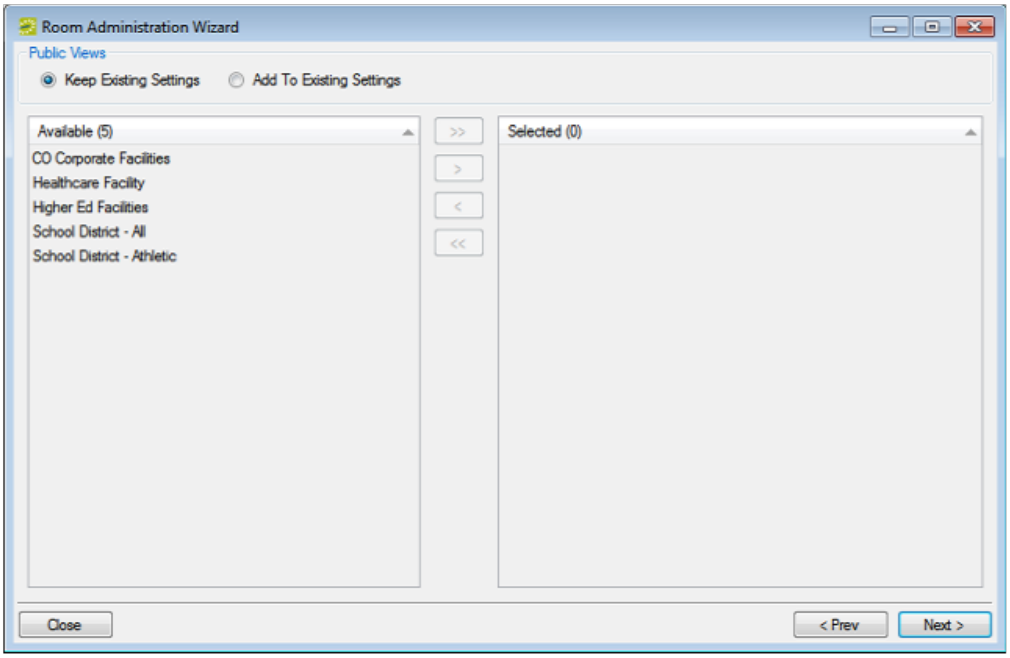
- If you are using the wizard to delete rooms from a view, rule, or so on, select Remove, and then continue to "To use the Room Administration Wizard to delete rooms".

Use the Room Administration Wizard to Add Rooms

1. On the Building drop-down 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. As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.
   - On the Classification drop-down list, leave the default value of (all), or select a specific room classification.
   - On the Room Type drop-down list, leave the default value of (all), or select a specific room type.
3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

> **Note:**
> 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 Meeting 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.



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, Everyday User Process Templates, and if applicable, Kiosk Profiles.
   - For Users, User Templates, and Everyday User 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.

     Note:
     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.

     Note:
     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”.

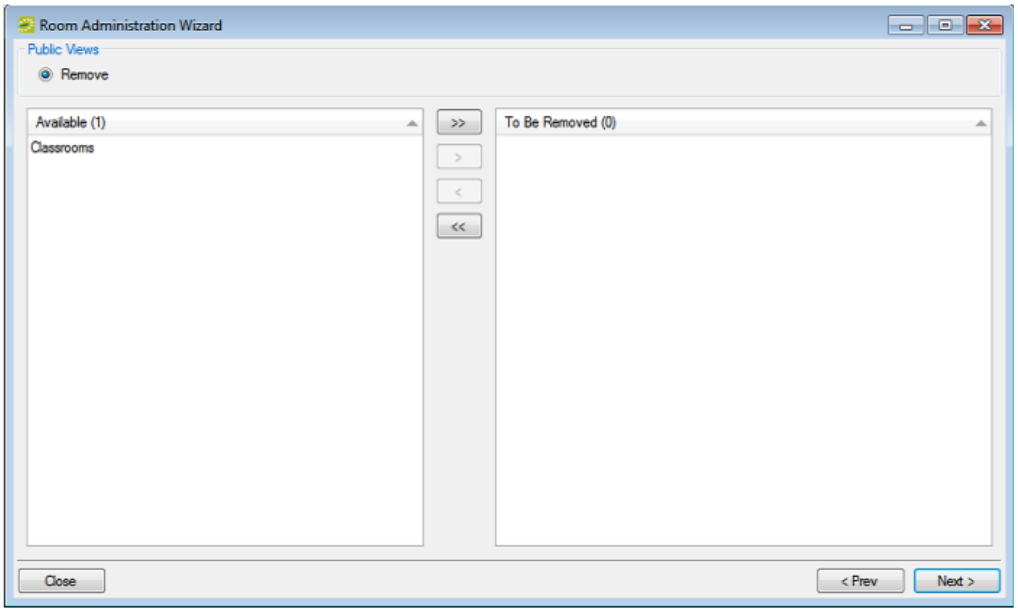
   - View Only—A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.
   - For Everyday User 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 Everyday User Process Template tab) into the Reserve pane.
   - Move rooms that require approval (that is, booked into the Request Status on the Everyday User Process 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 appears 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.

Use the Room Administration Wizard to Delete Rooms

1. On the Building drop-down 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. As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.
   - On the Classification drop-down list, leave the default value of (all), or select a specific room classification.
   - On the Room Type drop-down list, leave the default value of (all), or select a specific room type.
3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

> **Note:**
> 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 Meeting 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.



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, Everyday User 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 appears 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.

CHAPTER 138: Manage Saved Reports

A **saved report** is a report for which the filter settings have been saved, or saved, so that you do not have to adjust the filter settings every time you run the report. A saved 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 Saved Reports tool to edit or delete a saved report.

To learn more about creating Save Reports, see Working with Saved Reports. To learn more about creating Automated Reports from Saved Reports with EMS, see Creating Automated Reports.

1. On the EMS menu bar, click **System Administration** > **Tools** > **Manage Saved Reports**. The Saved Report Setups window opens. By default, this window lists the saved reports of all types that are configured in your EMS database.

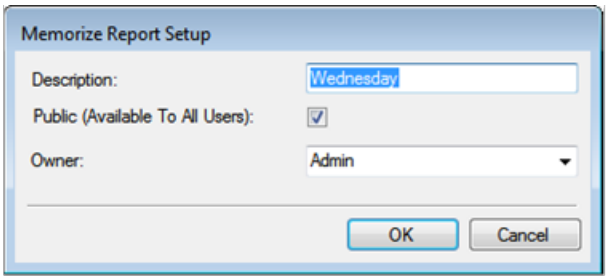
2. Optionally, from the **Report Type** drop-down list, select a report type to filter the list of reports that are displayed.

3. Select a saved report and then continue to one of the following:

   - Edit a saved report.
   - Delete a saved report.

Edit a Saved Report

1. Click **Edit**. A Save Report Setup dialog box opens, populated with the information for the selected report.



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 save Report Setup dialog box closes and you return to the save Report Setups window with the newly edited report automatically selected.

Delete a Saved Report

1. Click **Delete**. A message opens asking you if you are sure that you want to delete the selected saved report.
2. Click **Yes**. The message closes. The report is deleted.

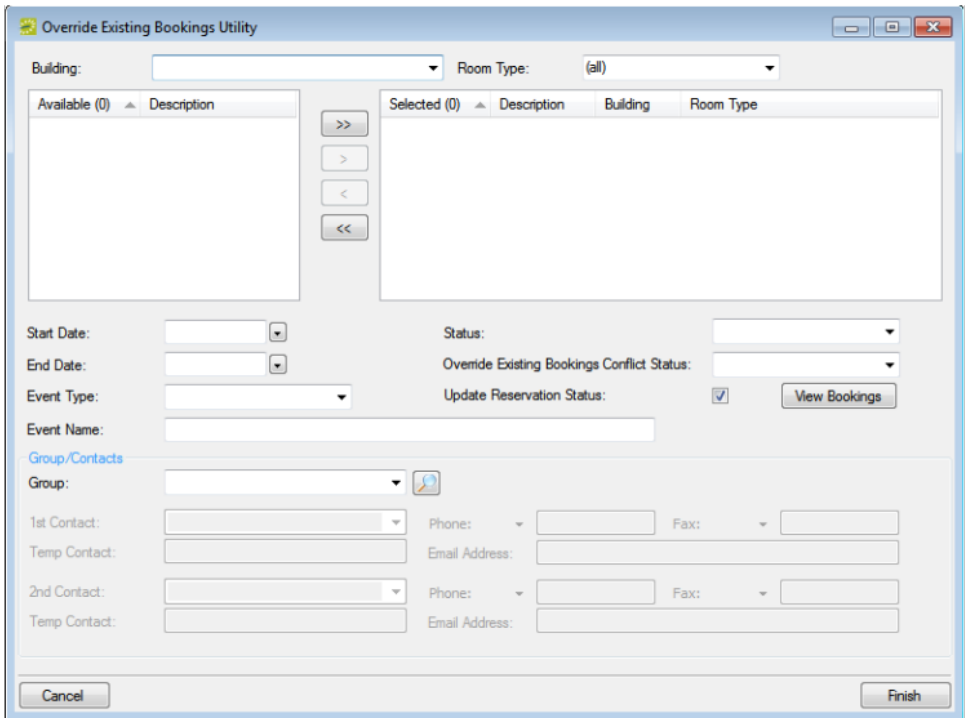
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CHAPTER 139: Override Existing Bookings Utility

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 override existing bookings using the utility, follow these steps:

1. On the EMS menu bar, click **System Administration** > **Tools** > **Override Existing Bookings Utility**. The Override Existing Bookings Utility window opens.



Override Existing Bookings Utility window

2. Do the following to search for the rooms that contain the bookings that you are bumping. A list of all the rooms configured for the selected building, area, or view and that are of the indicated Room Type will display on the Available list.
   - On the Building drop-down list, select a specific building, area, or view.
   - On the Room Type drop-down list, leave the Room Type set to the default value of (all), or select a specific room type.

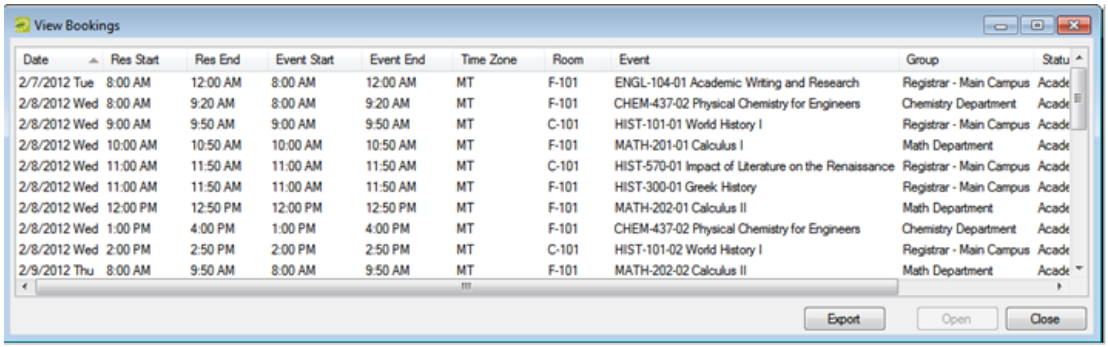
3. Select the room, or CTRL-click to select the multiple rooms that contain the bookings that you are bumping, and then click the Move button (>) to move the selected rooms to the Selected list.

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.

> **Note:**
> 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.



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.

> **Note:**
> If the appropriate event type is not available, you can configure it. **See Also:** Configure Event Types. If the appropriate status is not available, you can configure it. **See Also:** Configure Statuses. You can select a group from the Group drop-down list, or you can search for a group. If the appropriate group is not available, you can configure it. **See Also:** Configure Groups.

8. Select **Override Existing Bookings Conflict Status** (the status to which the bumped bookings are changed).

> **Note:**
> If the appropriate status is not available, you can configure it. **See Also:** Configure Statuses. If you select a status with a Cancel type, a Cancel Status dialog box opens. You must enter a cancel reason and indicate who canceled 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 appears 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.

CHAPTER 140: Import Reservations Utility

This utility enables you to import existing reservations into your EMS database from a tab-delimited text file. (**See Also:** Reservation Import File Specifications for the import file specifications.) Importing reservations is a two-step process.

1. Configure the reservation import. See also: Best Practices for Importing Reservations.
2. After you configure the import, you must import the reservations. You an can also delete an import session.

This topic will include information on the following:

- Best Practices for Using the Reservation Import Utility
- Configure the Reservation Import
- Import Reservations Into a Session
- Delete a Reservation Import

See Also: Reservation Import File Specifications

Best Practices for Using the Reservation Import Utility

The practices below are recommended for preparing existing reservations for import into EMS.

To view the fields you are importing in order, navigate to EMS **System Administration** > **Tools** > **Import Reservation Utility**. Use **Print** > **Import Format** to view the fields in order.

Reservation Import Utility Fields

FIELD	DESCRIPTION
Date	This can be in MM/DD/YYYY format if you are in the United States. If your computer is using DD/MM/YYY format, your file should match that format.
Start Time	This must be HHMM (e.g., 0800). Excel will try removing the leading zero, so you can format the column as Text, or as More Number Formats > Custom and enter "HHMM" as the custom format.
End Time	This must be HHMM (e.g., 1700).
Building	This is EMS Building Code, not description.
Room	This is the EMS Room Code.

FIELD	DESCRIPTION
Event Name	255 character max.
Group	Host, Customer, Employee if you have relabeled it in your organization.
1st Contact	
Setup Count	
Reservation Grouping	This number behaves similarly to an EMS reservation number: you should use the same number for each booking that should be grouped together. You can start with 1 and work upwards from there; all lines with a "1" will go under one reservation, so if you have a three day meeting, "1" would appear on the first three lines, then start with #2 for the next reservation.
Billing Reference	Billing reference can be left blank if not required.

Additional Best Practices

- Your import file must be tab-delimited. The easiest way to generate the file is by using Excel and then copying and pasting into Notepad, and saving that file.
- Make sure the Group, 1st Contact, and Billing Reference are the same for all bookings within any single reservation. (For example, Taylor cannot be the contact for Monday while Chris is the contact for Tuesday)
- Group Name will be matched based on the first one found in your database. If you have two groups called "Pat Lee", EMS will pick the first one and assign it to all matching reservations.
- Values for 1st Contact will create contacts in EMS as temporary contacts.
- Everyday User and Everyday User Process Templates will not be assigned to imported reservations.
- If you choose to map Everyday Users to your imported reservations, you should also make sure the Everyday User you assigned is set to "Active" security status. If an Everyday User logs on for the first time and they already have reservations created, they will be moved from "Activate on Logon" status to "Pending" status and you will need to manually activate their account. You can prevent this by making their account "Active" in advance.
- Be sure not to copy any header rows when you import. Your first row in Notepad should have tabs between, instead of spaces.
- Selecting the checkbox to "Skip Notifications" causes all imported bookings to bypass the checks for any EMS Notification Rules. The utility has been successfully used for importing tens of thousands of records at a time, but if you are processing notification rules, large batches could take a very long time to complete.

- The Import Utility only allows you to specify the Start Date. If your start time is greater than your end time, EMS will assume your end date is one day later. You cannot import a single booking longer than 24 hours.
- All times should be local to the time zone of the building you're booking. For example, 0800 for New York, and 0800 for London would create 8:00 am bookings in the respective buildings.
- Once you start loading your import file, if you see "Unassigned" rooms or groups/people, that means the data in your import file did not find an exact match. You can manually fix rooms and groups individually, but if you notice that there are way too many to cleanup individually, you might be better off deleting the import session, then fixing your import file, and then creating a new session. If you create manual mappings, they will be remembered for future import sessions.
- After launching an import, you might see a failure message. The import might have been completed, so after waiting a while, check to see before re-launching the import.
- If you are importing video conference reservations, you will need to one more step for them to have associated reservation numbers: after the import, for these reservations use the "Move Bookings" option to move them to a primary reservation number. That reservation should then be marked as "Videoconference" in EMS, and a host site designated.
- Setup and Teardown time are not included in the import. If you need the room blocked including setup/teardown time, you can set your start time and end time to reflect the entire duration for which you want to block the room, or you can modify the bookings post-import.

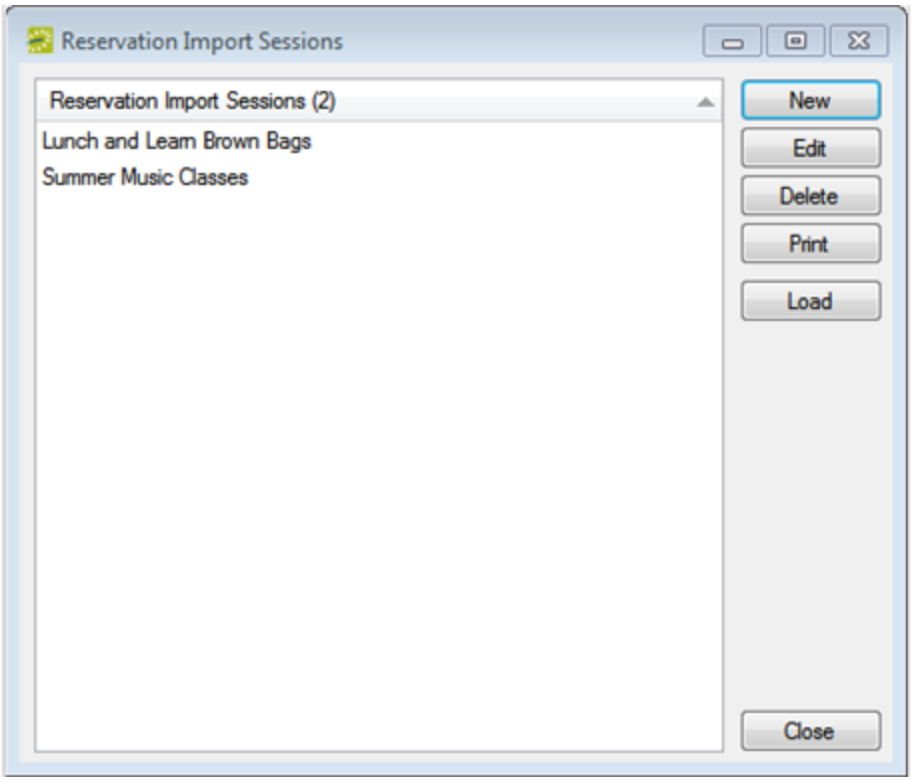
Configure the Reservation Import



Note:

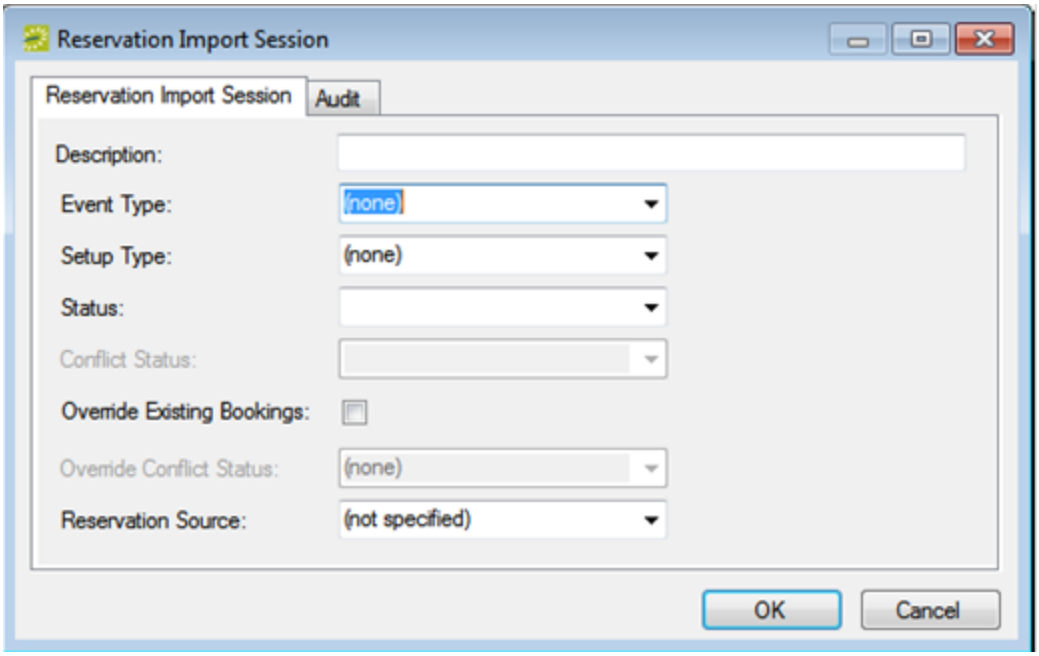
This section describes the steps for configuring a new reservation import. If you simply need to load an existing import, then after opening the Reservation Import Sessions window, skip to the following section, Import Reservations Into a Session.

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.



Reservation Import Sessions Window

2. Click New. The Reservation Import Session dialog box opens.



3. Enter the information for the new import session. See also: Best Practices for Importing Reservations.

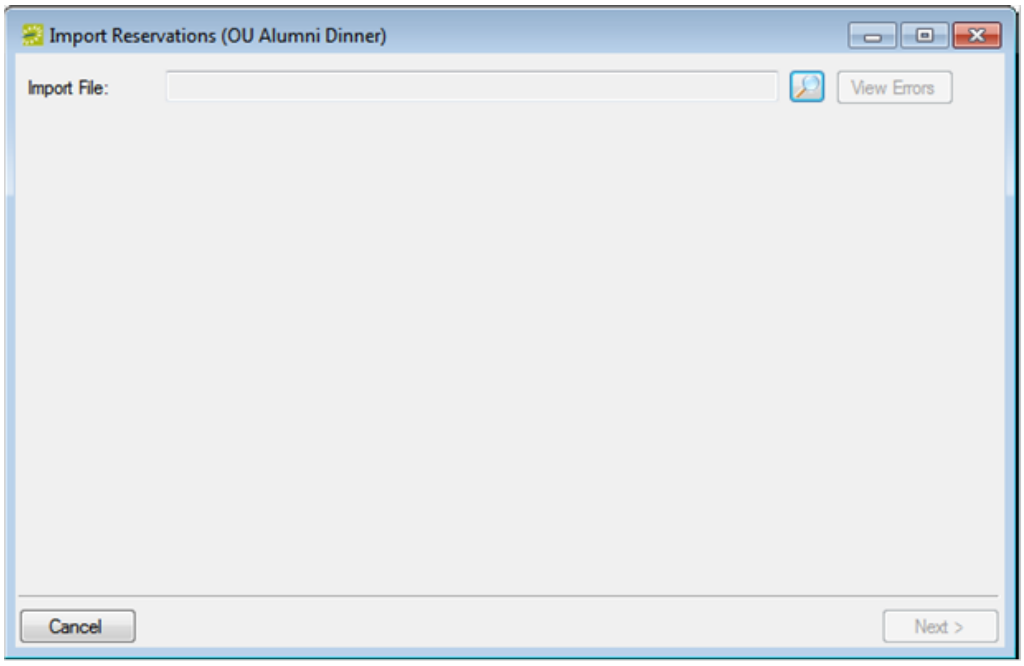
Option	Description
Conflict Status	Available only if you select a status with a type of Book Space. This status is applied only if the status that you selected results in the imported bookings being in conflict with existing bookings. **Note:** If the appropriate status is not available, you can configure it. See Configure Statuses.
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.
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 Configure Statuses.
Override Existing Bookings	Select this option if the imported bookings are to override existing bookings.
Reservation Source	Select a source if applicable.

Option	Description
	Note: If the appropriate reservation source is not available, you can configure it. See Configure Reservation Sources.
Setup Type	Select the setup type for the imported reservations. **Note:** If the appropriate setup type is not available, you can configure it. See Configure Setup Types.
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 Configure Statuses.

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.

Import Reservations Into a Session

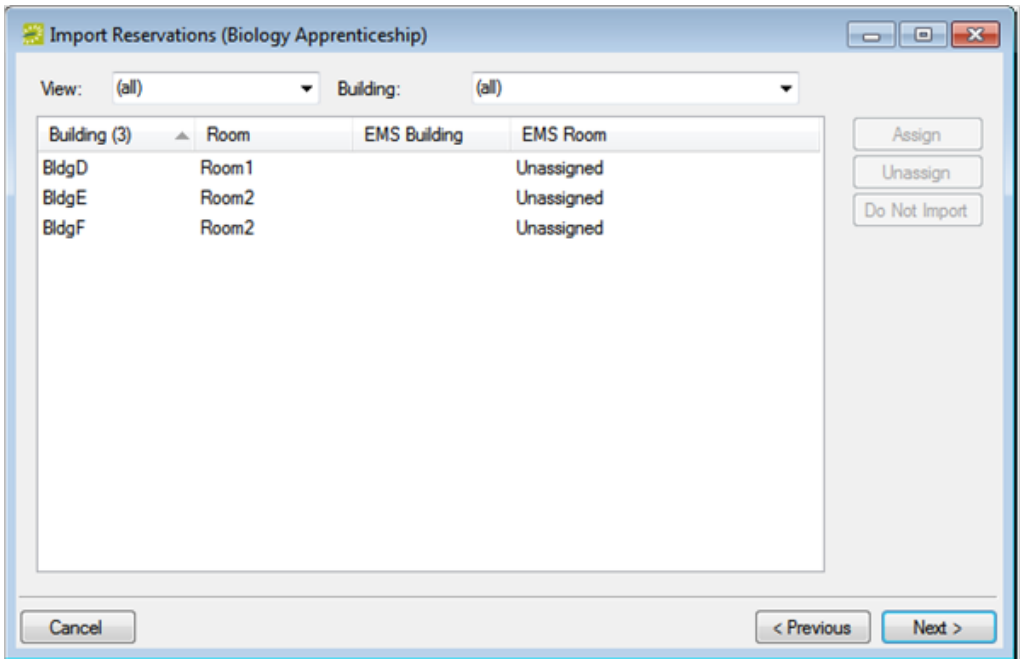
1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility to open the Reservation Import Sessions window.
2. Select the reservation session into which you are importing the reservations, and then click Load. The Import Reservations wizard opens.



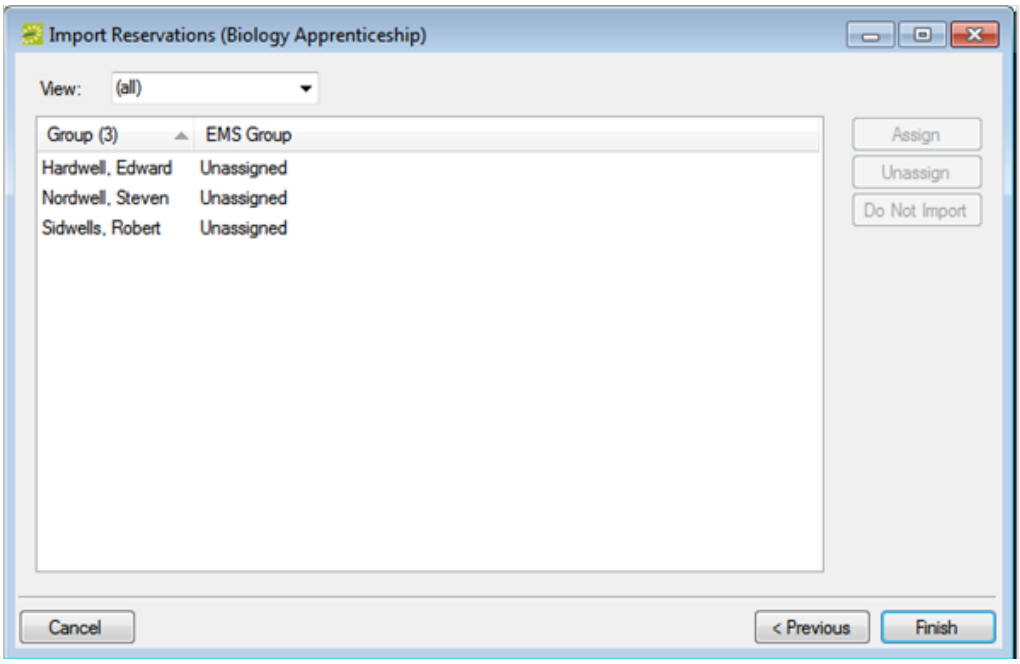
Import Reservations Wizard

3. Click the Search icon to browse to and select the file 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 them.

Note:
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.



4. To filter the list, select a different view on the View drop-down list and/or a different building on the Building drop-down list.
5. To work with room assignments:
   - To Assign a Room, 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.
   - To Exclude a Room from the Import, select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Do Not Import. This excludes all the reservations that are assigned to this Building/Room combination.
   - To Unassign a Room, select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Unassign.
6. Click Next. The Import Reservations Wizard displays all groups that are assigned to reservations in the import file.



Groups Displayed in the Import Reservations Wizard

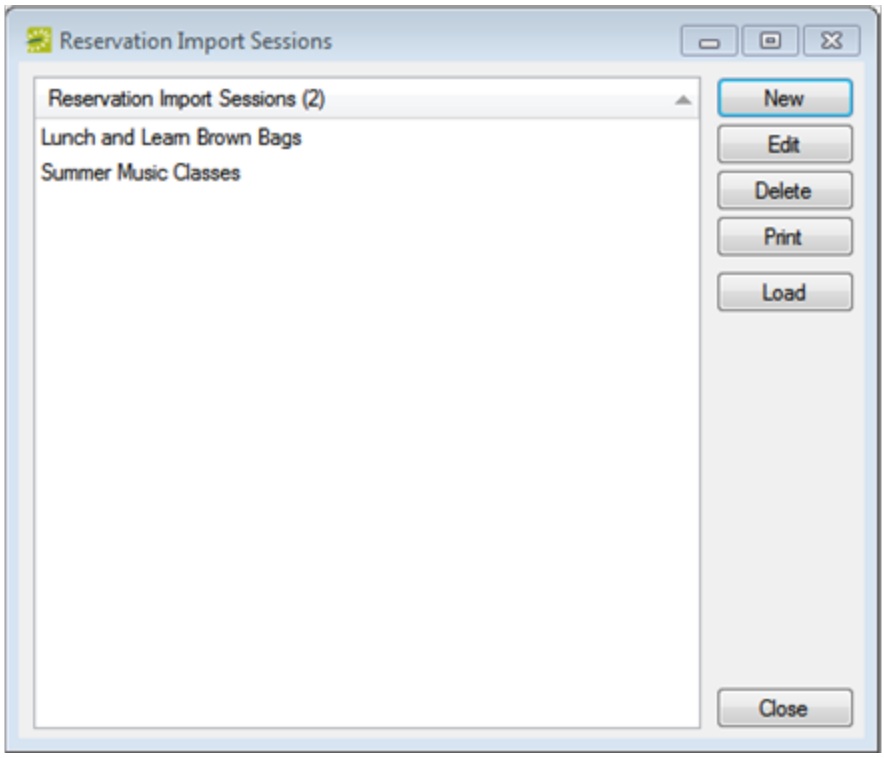
Note:
If a group name in the import file is identical to a group name in the EMS database, then the record is automatically assigned; otherwise, the record remains unassigned.

7. To work with groups:
   - To Assign a Group, 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.
   - To Exclude a Group From the Import, 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.
   - To Unassign a 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.

Delete a Reservation Import

You can delete a reservation import session. If you delete an import session, all reservations in the session are deleted. Because you cannot recover these reservations other than to repeat the import process, make certain you 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.



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.

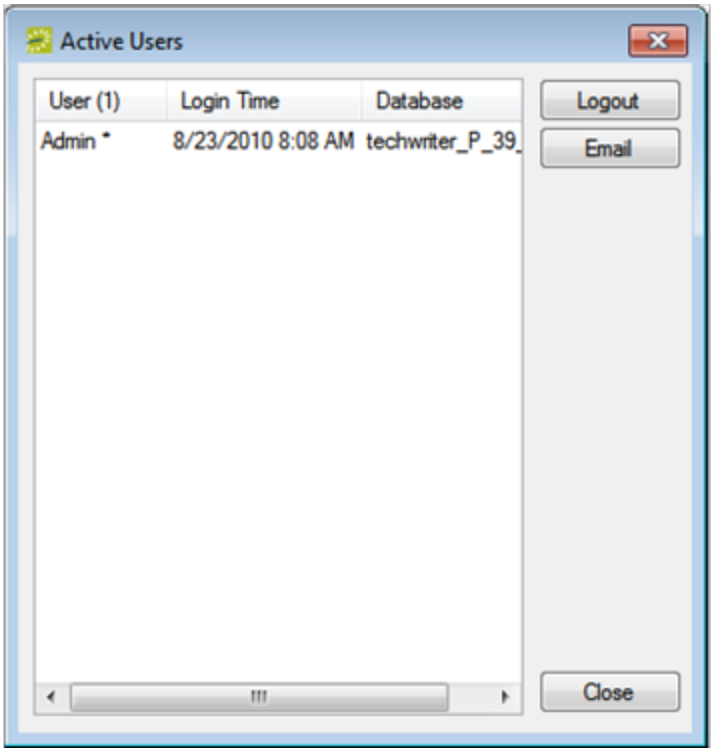
CHAPTER 141: View and Email Logged-In Users

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.

> **Note:**
> To receive email, a user must have an email address configured for his/her user account.

To view and email logged-in users, follow these steps:

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.



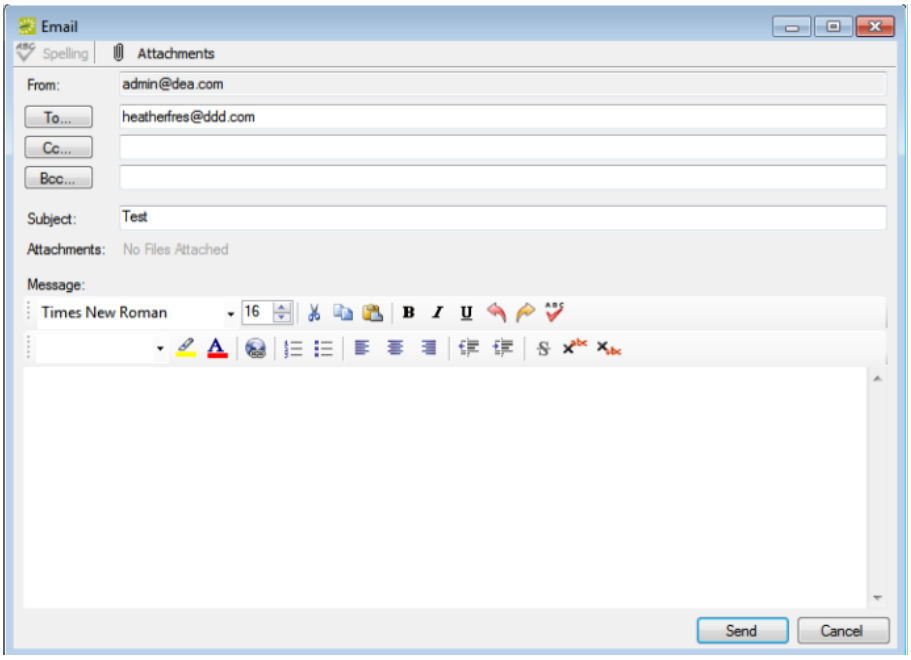
Active Users window

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.

> **Note:**
> 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.



SMTP Email window

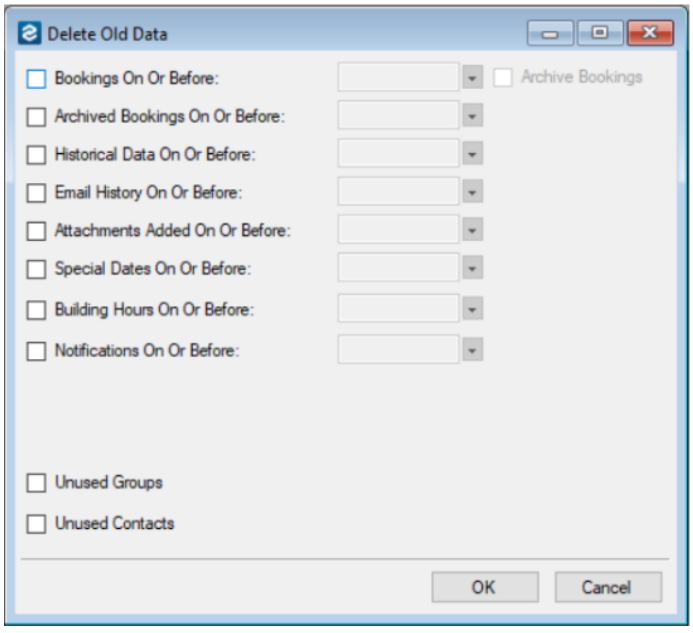
CHAPTER 142: Delete Old Data

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.

1. On the EMS menu bar, click **System Administration** > **Tools** > **Delete Old Data**.

   The Delete Old Data dialog box opens.



   Delete Old Data dialog box

2. Select that data that is being deleted, and then, if applicable enter the on/or before deletion date.

> **Note:**
> 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 appears indicating that deleting this data is a permanent action and asking you if it is OK to continue.

> **Note:**
> 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**.

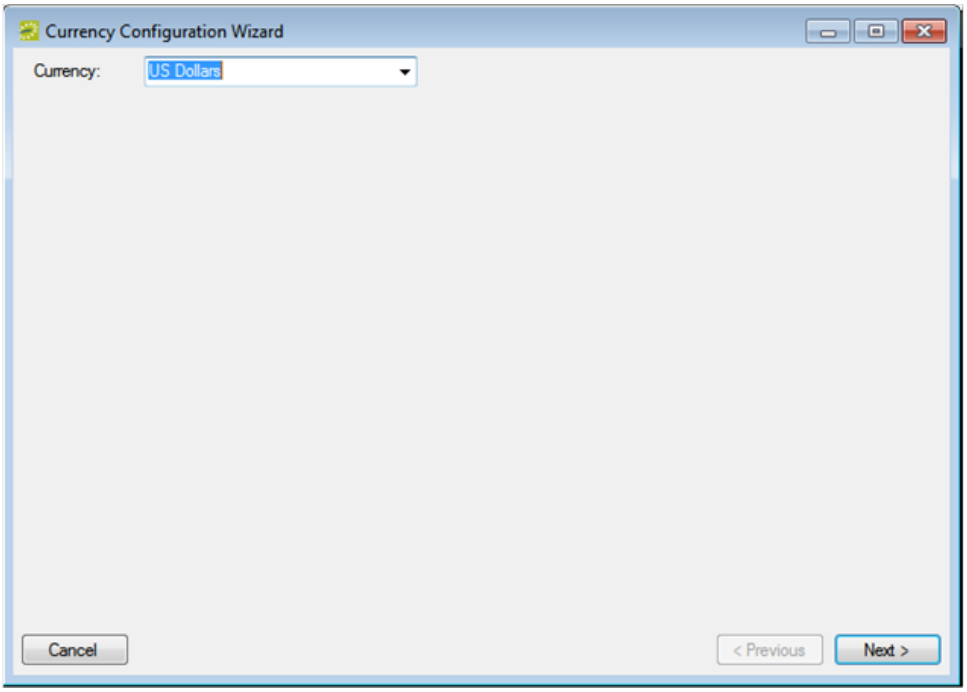
   A message opens when all the data is deleted.

5. Click **OK**.

CHAPTER 143: Currency Configuration Wizard

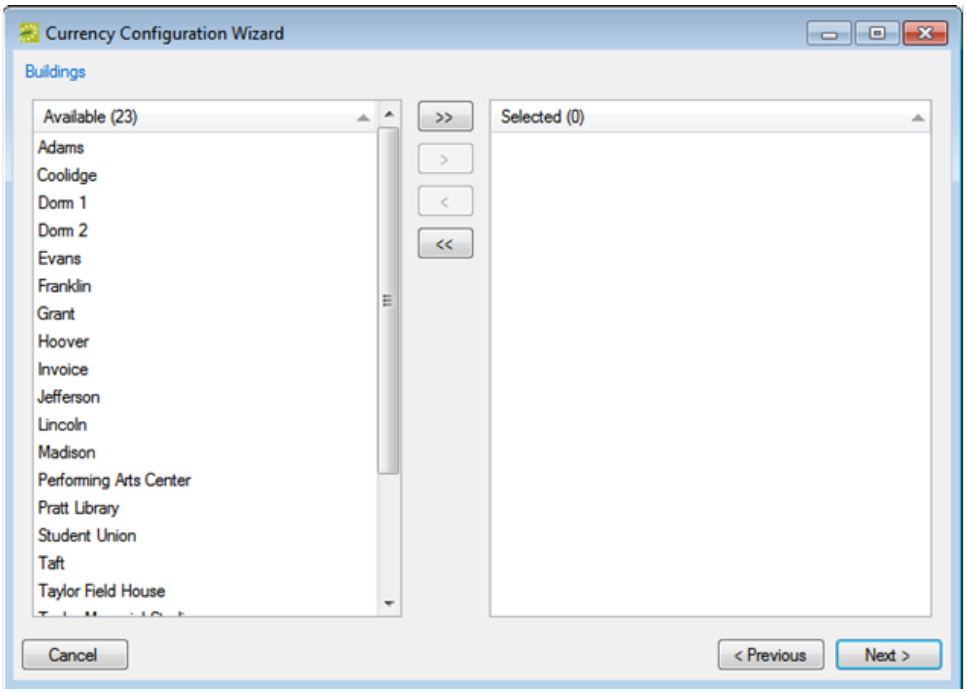
Once you configure a currency in your EMS database, you can assign the currency to buildings, categories, and/or calculations. You can assign the currency to a single building, category, or calculation during configuration, or you can use the Currency Configuration Wizard to assign the currency to multiple buildings, categories, and/or calculations in a single step.

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** drop-down list.



Currency Configuration Wizard

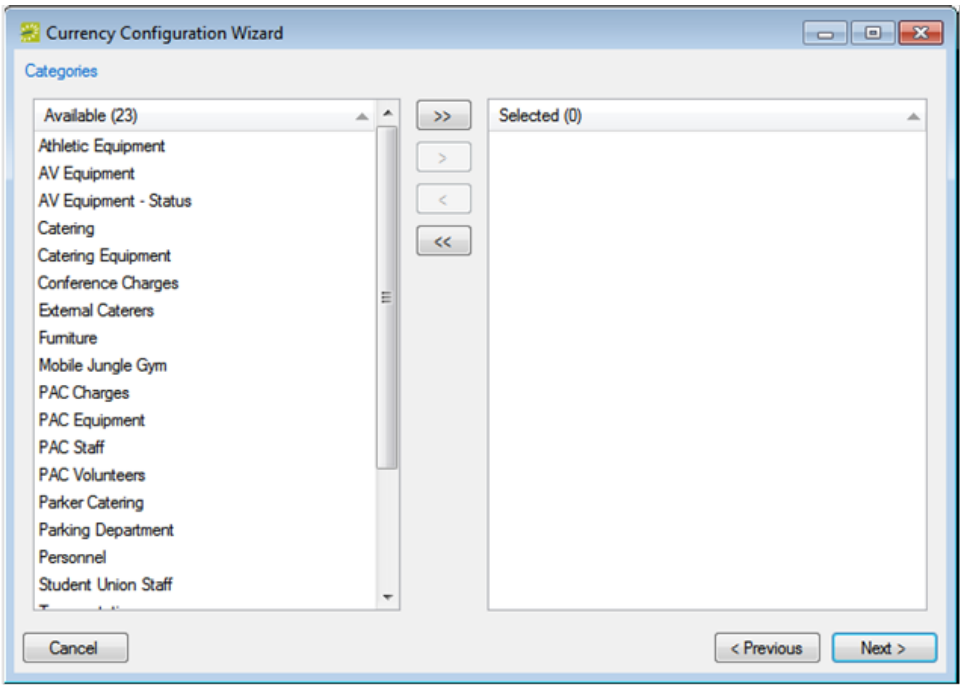
2. On the **Currency** drop-down list, select the currency that you are assigning, and then click **Next**. The Currency Configuration Wizard, Buildings page opens. This page lists all the buildings that are currently configured in your EMS database.



Buildings Page on the Currency Configuration Wizard

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.

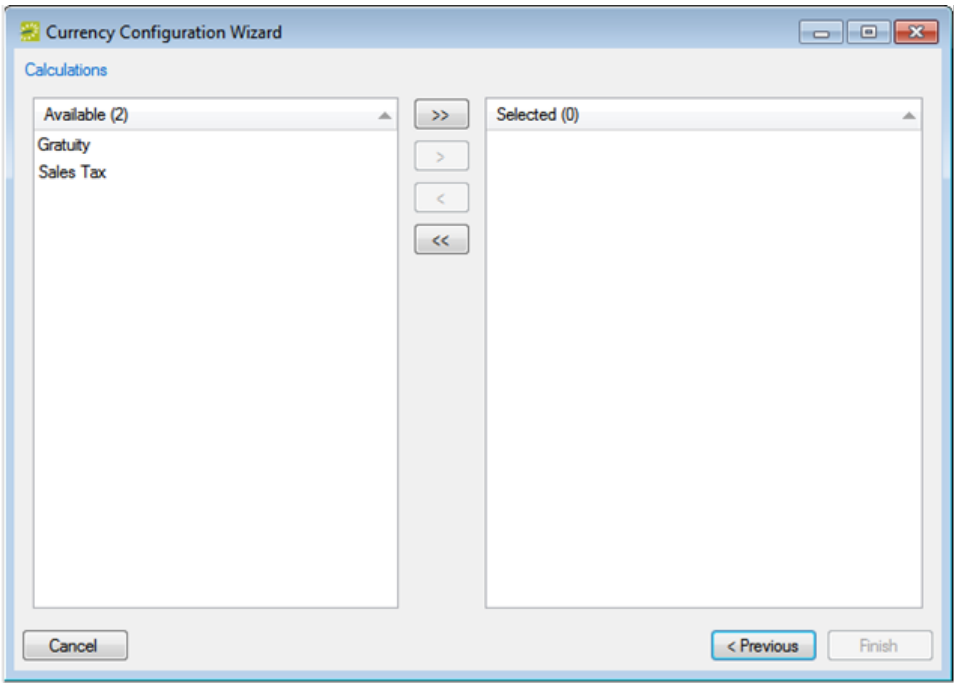
4. Click **Next**. The Currency Configuration Wizard, Categories page opens. This page lists all the active categories that are currently configured in your EMS database.



Categories Page of the Currency Configuration Wizard

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.

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.



Calculations Page of the Currency Configuration Wizard

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.

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.

CHAPTER 144: Booking Move/Change Status Wizard

The Booking Move/Change Status Wizard allows you to change critical information (date and/or status) for multiple bookings across multiple reservations in a single step.

Note:
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.

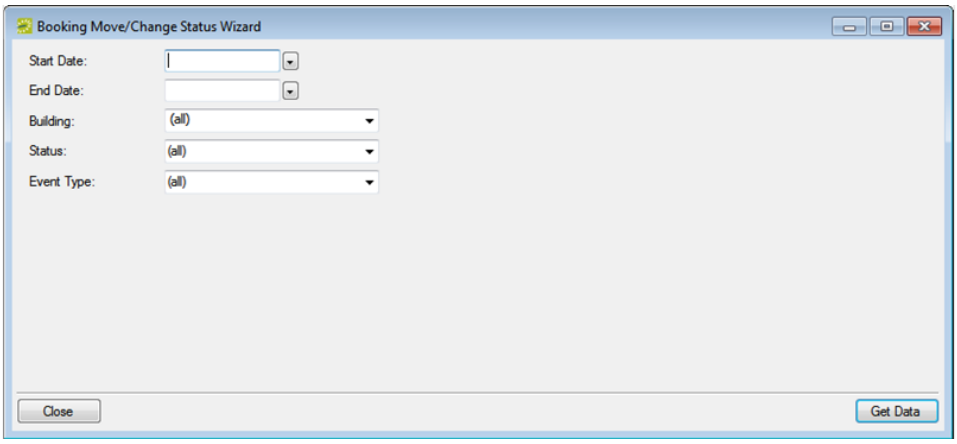
This topic will provide information that will allow you to do the following:

- Use the Booking Move/Change Status Wizard
- Move Multiple Bookings to a Different Date
- Change the status for multiple bookings

Use the Booking Move/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.



   Booking Move/Change Status Wizard

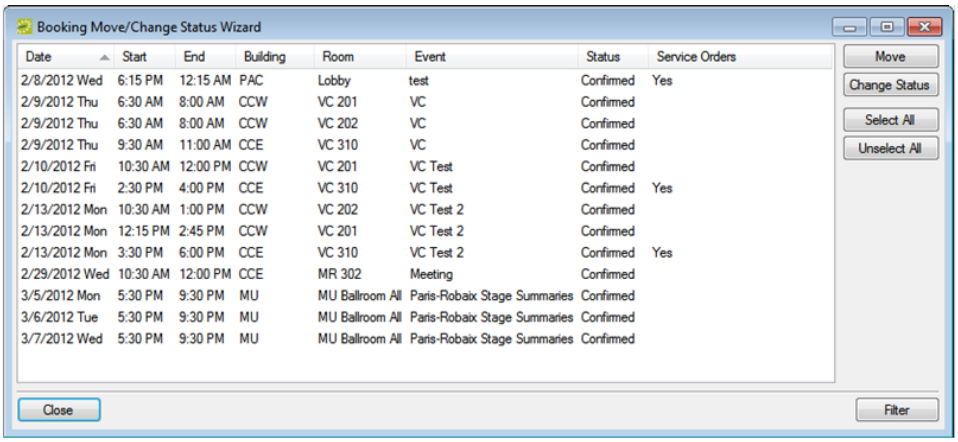
2. In the Start Date field, enter the starting date for the bookings for which you are changing the date and/or status, and in the End Date field, enter the ending date.

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.

> **Note:**
> 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.

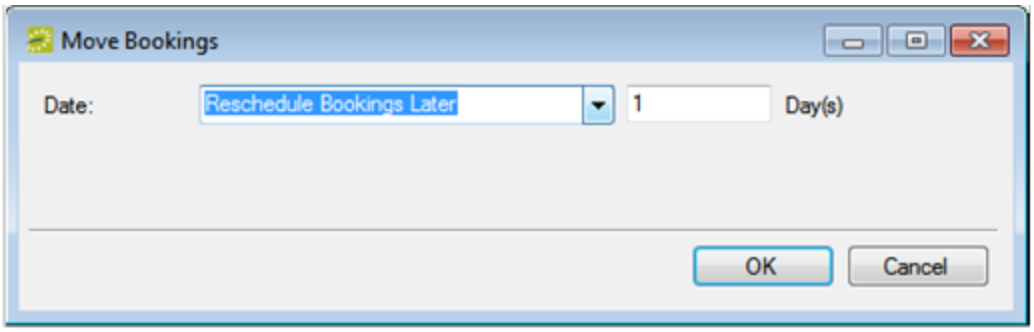


Select Bookings Window

5. Continue to one of the following:
   - To move multiple bookings to a different date below.
   - To change the status for multiple bookings.

Move Multiple Bookings to a Different Date

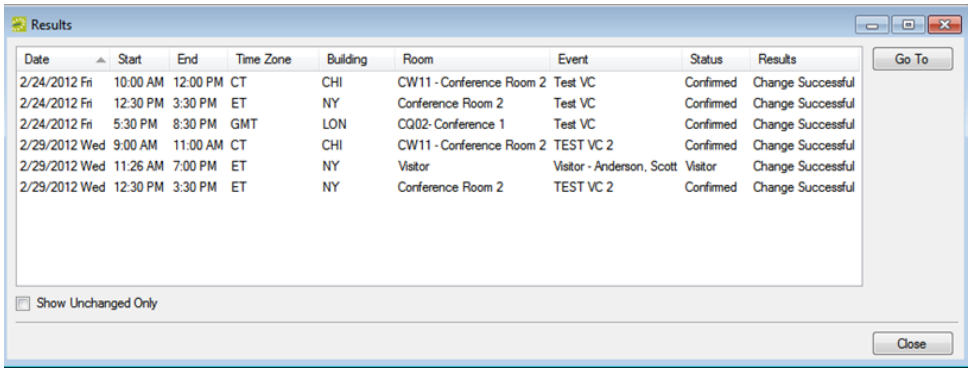
1. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the date.
2. On the Select Bookings window, click Move. The Move Bookings dialog box opens.



Select Bookings Window

3. Select a different value for the date, and then click OK. The Results window opens. This window displays a list of all the selected bookings, whether the date change was successful.

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.



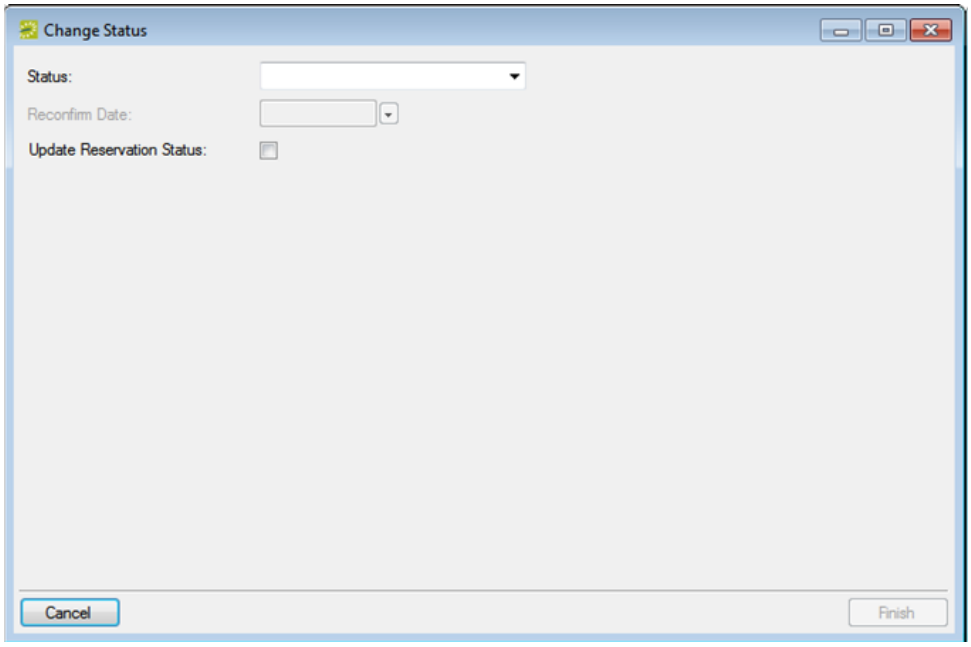
The Results Window

> **Note:**
> 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 the next section.

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.

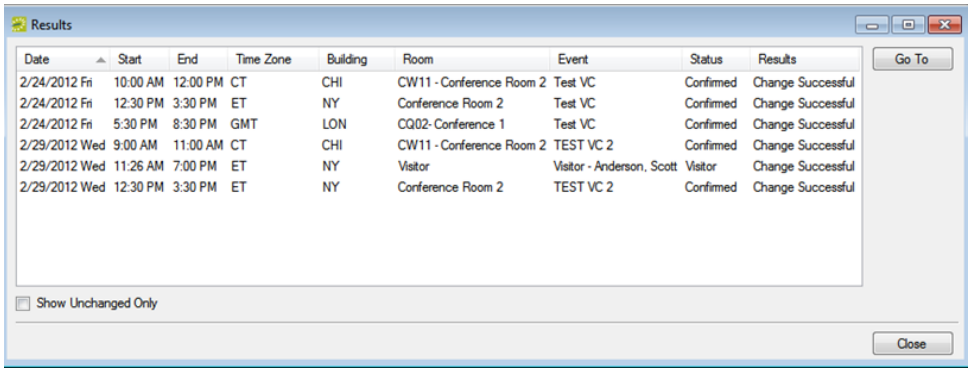


Change Status Dialog Box

3. On the Status drop-down list, select the new status for the bookings.

> **Note:**
> If you select any type of Canceled status, then three additional fields—Reason, Who Canceled 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.



Results Window

> **Note:**
> 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, see section above, “To change the status for multiple bookings”.

CHAPTER 145: The Video Display Interface

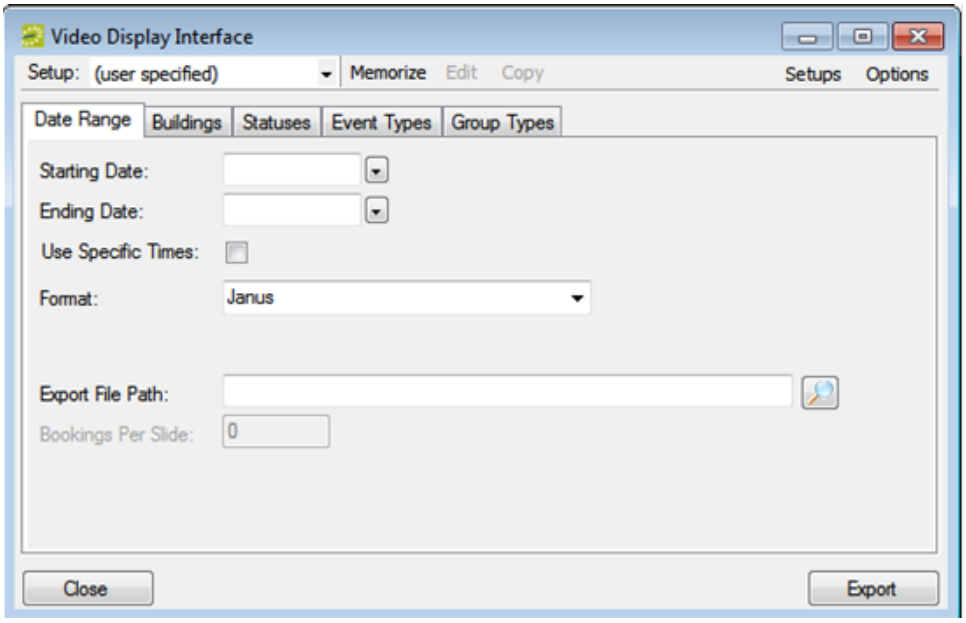
The EMS Video Display Interface (VDI) is an optional, add-on component for EMS that exports meeting and event information to a video display system such as Janus, Target Vision, and so on. It does this by periodically saving booking information to a file which the video display system then retrieves 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 integrate EMS with your video display, you will:

- Run the tool from EMS Desktop Client
- Configure settings for exporting booking information
- Export the data to your video display system
- Configure Windows Task Scheduler to automatically export data at a regular interval

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.



Video Display Interface

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 appears indicating that the export file was created successfully.
4. Click OK.



Note:

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.)

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:

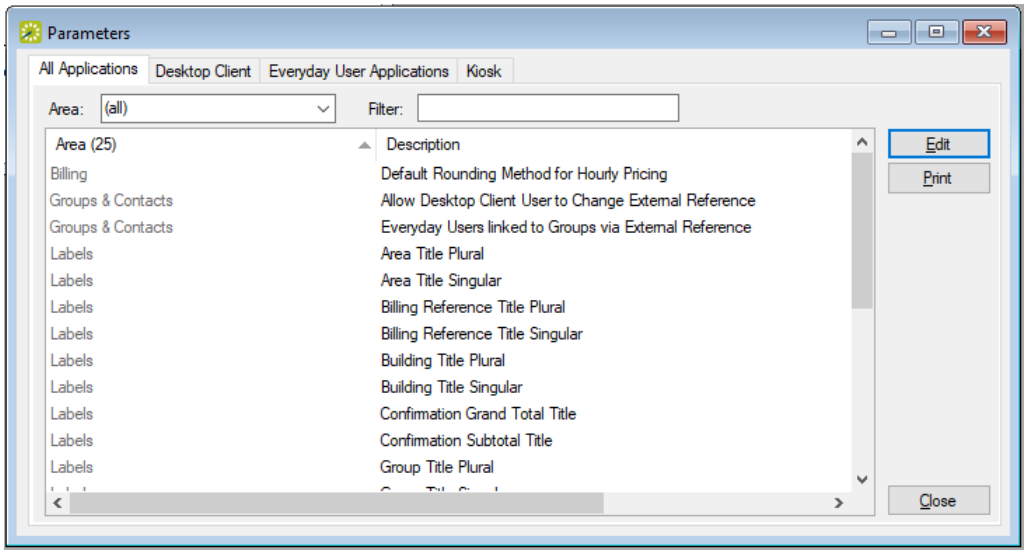
"C:\Program Files\EMS [PRODUCT NAME and VERSION NUMBER]\EMS.exe"/vdi.

CHAPTER 146: System Parameters

This section details the EMS system parameters you can configure as the EMS Administrator.

You can access system parameters from the **System Administration** > **Settings** > **Parameters** menu option. From there, you select the tab and parameters for the EMS product you want to work with.

- All Applications Tab Parameters
- Desktop Client Tab Parameters
- Everyday User Applications Tab Parameters
- Kiosk Parameters



Parameters Dialog

See Also:

- EMS for Outlook System Parameters
- EMS Mobile App Parameters
- EMS Web App Parameters

CHAPTER 147: EMS System Parameters

All Applications

Parameters for All Applications within EMS are organized by the following Areas:

- Billing
- Groups & Contacts
- Labels
- Reservations
- System

Billing

Area	Title	Description	Value	EXAMPLE
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.		If the setting is set to 15 minutes, nearest, and a booking is made from 9:00 am - 10:20 am, the room will be billed for 1.25 hours. If the booking is from 9 am - 10:25 am, the room will be billed at 1.5 hours because it is being billed at the nearest "15 minutes."

Groups & Contacts

Area	Title	Description	Value	EXAMPLE
Groups & Contacts	Allow Desktop Client User to Change External Reference	If enabled, an EMS Desktop Client user can change the External Reference values on Group and Contact		

Area	Title	Description	Value	EXAMPLE
		records. Customers using HR Toolkit are strongly encouraged to disable this parameter so as not to disrupt the automatic association of these records with Everyday User records.		
Groups & Contacts	Everyday Users linked to Groups via External Reference	If set to YES, this parameter links group and Everyday User records when making a new reservation in EMS. The Everyday User field on the Reservation navigator is automatically populated based on the group selected.		John Doe is a Group with an external reference of 123. John.doe@emssoftware is an Everyday User with an external reference of 123. If this parameter is set to YES, all reservations made from the EMS Desktop Client that have John Doe as the Group will also have John Doe as the Everyday User "tied" to it. The Everyday User, John Doe, will be able to log in to the EMS Web App and see the bookings made for John Doe from the EMS Desktop Client.

Labels

Area	Title	Description	Value	EXAMPLE
Labels	Area Title Plural	The plural label for the Area field.		Regions, Zones, Campuses
Labels	Area Title Singular	The singular label for the Area field.		
Labels	Billing Reference Title Plural	The plural label for the Billing Reference field.		

Area	Title	Description	Value	EXAMPLE
Labels	Billing Reference Title Singular	The singular label for the Billing Reference field.		Client Matter Number, Charge Number
Labels	Building Title Plural	The plural label for the Building field.		Offices
Labels	Building Title Singular	The singular label for the Building field.		Offices
Labels	Confirmation Grand Total Title	The label for the Grand Total field on a Confirmation report.		Full Amount Due
Labels	Confirmation Subtotal Title	The label for the Subtotal field on a Confirmation report.		
Labels	Group Title Plural	The plural label of the Group field. The Group field refers to people or within your organization or external entities who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc.).		Hosts, Employees, Customers, Organizations
Labels	Group Title Singular	The singular label of the Group field. The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc).		
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.		GL Code (or any other name that a customer might want to use).

Area	Title	Description	Value	EXAMPLE
				This field is sometimes used for things unrelated to a Purchase Order.
Labels	Room Size Title	The label for a Room's Size field.		Sq. Feet, Meters
Labels	Room Title Plural	The plural label of the Room field. The Room field refers to reservable spaces within your organization.		Locations, Spaces
Labels	Room Title Singular	The singular label of the Room field. The Room field refers to reservable spaces within your organization.		

Reservations

Area	Title	Description	Value	EXAMPLE
Reservations	Group Bookings by UTC times and keep together on Video Conference Reservations	If enabled, any changes made to a booking belonging to a Video Conference occurrence cascade to the other related bookings within the occurrence. It is strongly recommended that this parameter be enabled if you plan to use EMS for video conference management in multiple rooms.		Typically set to YES. This parameter applies to EMS Desktop Client. Video Conference-enabled template bookings on the EMS Web App already are linked and cannot be edited individually.
Reservations	Max Length for Event Name	The maximum number of characters, including		

Area	Title	Description	Value	EXAMPLE
		spaces, that a user can enter in the Event Name field when creating or editing a new reservation.		
Reservations	Update Billing Information When Changing Group	If set to YES, this parameter automatically updates the billing information when a user selects a different group for a reservation.		This applies to EMS Desktop Client and EMS Web App if parameter is set to YES. If Parameter is set to NO, this parameter will only work in the EMS Desktop Client.
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.		Works on both EMS Desktop Client and EMS Web App. If parameter is set to YES and room is changed, the room charge will change. If parameter is set to NO and room gets changed, the room charge will NOT change; the room charge will remain the same. Example: 1201 = 10/hour 1202 = 15/hour If room is changed from "room 1201" to "room 1202," the room charge will remain 10/hour on booking if this parameter is set to NO for EMS Web App OR EMS Desktop Client.

System

Area	Title	Description	Value	EXAMPLE
System	Allow Access To System Check Pages From Any Machine?	If disabled, access to SystemCheck.aspx for all applications (except the EMS Web App) is limited to the web server. As of the June 2014 release, the EMS Web App will no longer have a SystemCheck.aspx page.		
System	EMS Web Application Hyperlink Text	Controls the text for the EMS Web App URL hyperlink in automatic confirmation emails (**Configuration** > **Everyday User Applications** > **Everyday User Process Templates** > **Confirmation** > **Summary** tab).		
System	EMS Web Application URL	The EMS Web App URL that is displayed in emails related to the EMS Web App, as well as EMS Group Notifications that include cancellation and reconfirmation links.		

CHAPTER 148: EMS System Parameters

Below are the parameters for EMS Desktop Client and EMS Desktop Client — Academic Planning (optional).

EMS Desktop Client

Parameters for the EMS Desktop Client are broken into the following Areas:

- Billing
- Email
- Groups & Contacts
- Integration to Microsoft Exchange
- Labels
- LDAP
- Messaging
- Notifications
- Platform
- Reports
- Reservations
- Resources
- Service Orders
- System

Billing

Area	Title	Description	Value	EXAMPLE
Billing	Determine Invoice Due Date by Adding 'xx' Days	Sets the number of days specified to determine the invoice due date (e.g., 30 days). When creating an invoice in EMS, the due date will be pre-populated by this parameter.		15, 30, 60, 90
Billing	Service Order End Time if None Spe-	Select Event Time or Reserved Time as the	Reserved Time or Event Time	A resource costs

Area	Title	Description	Value	EXAMPLE
	cified	Service Order End Time, unless otherwise specified. If no end time is entered in the service order time field, whatever is in this parameter will take effect.		10/hour based on Service Order Time. The parameter is set to "Event Time" and the booking is from 8 am - 5 pm. The Event End Time with a 5:30 Reserved End time. The resource will be in use starting at 9 am but no end time on the resource is set. Therefore, the resource will be in use until 5 pm and will be billed from 9 am until 5 pm.

Email

Area	Title	Description	Value	EXAMPLE
Email	Enable Email Support	When set to YES, you can email a Confirmation to the contact person or group that is making a reservation directly from EMS in Navigator > Confirmation. If parameter is set to NO, the 'Email' button is grayed out on the Confirmation screen.	Yes/No	The attachment is saved at the Reservation level on the e-mail tab. If set to YES, you can view the attachment. If set to NO, you can see that an attachment was sent with the confirmation by the indicator YES

Area	Title	Description	Value	EXAMPLE
				and a check box "attachment" but you cannot view the attachment.
Email	SMTP - Save Email Attachments (Data-base Size Will Increase)	When set to YES, email attachments are saved.	Yes/No	Default is NO.
Email	SMTP - Use SSL	Used if your SMTP Server is enabled for SSL.	Yes/No	
Email	SMTP Security Pro-tocol	The security protocol for the mail server used to send emails on behalf of the everyday user applications.	(none), TLS, SSL3	

Groups & Contacts

Area	Title	Description	Value	EXAMPLE
Groups & Contacts	Default Address Format as Inter-national	If enabled, the International address checkbox is enabled by default when creating a new Group or Contact record and the fields 'State' and 'Zip' do not appear when creating a new Group.	Yes/No	Default is NO.
Groups & Contacts	Default Country	Default Country for creating a new Group or Contact record. If set to a particular country, new Groups will have this country as their default.	Default is blank for none	USA, Australia, etc.

Area	Title	Description	Value	EXAMPLE
Groups & Contacts	Default Pricing Plan For New Groups	If this field is populated with a pricing plan, new Groups will inherit this pricing plan as they are added to the EMS database. Pricing Plans are configured in the EMS Desktop Client in **Configuration** > **Billing** > **Pricing Plans**.		Default is (none).
Groups & Contacts	Default Require Contact	If enabled, the Require Contact checkbox is enabled by default when creating a new Group record. A user must therefore also create at least one Contact record for the Group.	Yes/No	Default is NO.
Groups & Contacts	Group Bad Status Title	Label used for “Bad” value on the Group Status drop-down list. On the Billing Information tab of the Group record there is a field for status with values Bad, OK or Warning. These three labels can be changed to suit organization's business rules. If the Group status is set to "Bad", no reservations can be made for this Group.	Bad	Delinquent, Do not Book
Groups & Contacts	Group OK Status Title	Label used for “OK” value on the Group Status drop-down list.	OK	Good Standing.
Groups & Contacts	Group Warning Status Title	Label used for “Warning” value on the Group Status drop-down list. If the Group status is set to "Warning," a message appears when this group is selected, however a	Warning	Slow paying.

Area	Title	Description	Value	EXAMPLE
		reservation can still be made for this Group.		
Groups & Contacts	Offer Drop-Down 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 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. Typically, only very large organizations will set this parameter to NO.	Yes/No	Typically set to YES.
Groups & Contacts	Pricing Plan Required For Groups	If enabled, a user must specify a Pricing Plan when creating or editing a Group record. Pricing Plans are configured in the EMS Desktop Client in **Configuration** > **Billing** > **Pricing Plans**. Typically used when the customer wants to include a pricing plan on a Group record.	Yes/No	Typically set to NO.
Groups & Contacts	Show Account Field On Group	If enabled, an Account field is displayed on a Group record. Accounts are usually created for purposes of tracking revenue tied to resources. The Account field on the Group record can be	Yes/No	Typically set to NO.

Area	Title	Description	Value	EXAMPLE
		used for other purposes such as tying a salesperson to a Group.		

Integration to Microsoft Exchange

Area	Title	Description	Value	EXAMPLE
Integration to Microsoft Exchange	Allow date/time changes on PAM Bookings in EMS Client	If set to NO, the EMS Desktop Client user will not be able to change date or time on bookings made through EMS for Outlook or an Exchange-enabled template.	Yes/No	The reason a customer might want this set to NO, is so that an EMS Desktop Client user will not be able to change the date or time of a meeting that is on a person's calendar.
Integration to Microsoft Exchange	Exchange Integration Web Service URL	The URL for the Exchange Integration Web Service.		http://localhost/Pam44-1/Service.asmx

Labels

Area	Title	Description	Value	EXAMPLE
Labels	1st Contact Title	The label for the first Contact field on a Reservation.		1st Contact, Primary Contact, Assistant, Booked By
Labels	2nd Contact Title	The label for the second Contact field on a Reservation.		2nd Contact, Secondary Contact, Backup Assistant, Backup Contact
Labels	Attendee Company Name	Label for		Company Name

Area	Title	Description	Value	EXAMPLE
		the Company field of an attendee within an Attendees-type Category. Attendee type categories are typically used to add people to an event. Each of these fields can be relabeled based on the customer's needs and how they are using this category.		
Labels	Attendee Email Address	Label for the Email Address field of an attendee within an Attendees-type Category.		Email Address
Labels	Attendee Name	Label for the Name field of an attendee within an Attendees-type Category.		Name, Attendee, Visitor, Participant
Labels	Attendee Notes	Label for the Notes field of an attendee within an Attendees-type Category.		Notes, Comments
Labels	Attendee Phone	Label for the Phone Number field of an attendee within an Attendees-type Category.		Phone
Labels	Attendee Visitor	Label for the Visitor field of an attendee within an Attendees-type Category.		Visitor
Labels	Check Number Title	The label for the Check No. field within a Transaction. This field displays on the payment window.		Check No., Journal Entry #, Charge Code
Labels	Default Phone 1 Label	The label for the first	10 characters	Phone, Primary, Office, Mobile,

Area	Title	Description	Value	EXAMPLE
		phone number field under a Contact when creating or modifying a reservation. You can also create a list of options to provide a choice. This list is created in the Phone/Fax Labels List parameter.		Fax, Other
Labels	Default Phone 2 Label	The label for the second phone number field under a Contact when creating or modifying a reservation. You can also create a list of options to provide a choice. This list is created in the Phone/Fax Labels List parameter.	10 characters	
Labels	Event Coordinator Title	The label for the Event Coordinator field on a Reservation or Group.	Event Coordinator	Scheduler, Banquet Manager, Event Captain
Labels	External Reference Title	The label for the External Reference field. This field is on the Group Record. This field is also used to link Everyday Users to the Group record.		External Reference, ID Number, Charge Number
Labels	Payment Type Title Plural	The plural label for the Payment Type field within a Transaction. This field displays on the payment window.	Plural	Payment Types, Payment Methods
Labels	Payment Type Title Singular	The singular label for the Payment Type field within a Transaction. This	Singular	

Area	Title	Description	Value	EXAMPLE
		field displays on the payment window.		
Labels	Phone/Fax Labels List	Options available as a drop-down menu in the Phone 1 and Phone 2 fields when creating or editing a Group, a Contact, or a Reservation. Enter options as text separated by semicolons. Default options are Phone, Fax, Mobile, and Other.		Primary, Office, Mobile, Fax, Other
Labels	Sales Category Title Plural	The plural label for the Sales Category field. This field is on the Group record and is exposed on the 3rd screen of the Reservation Wizard. The field displays on the query builder but on no other report. This field is often re-labeled and used for tracking other information at the reservation and/or Group level.	Plural	Sales Categories.
Labels	Sales Category Title Singular	The singular label for the Sales Category field.	Singular	Sales Category.
Labels	Salesperson Title	The label for the Salesperson field on a Reservation or Group.		

LDAP

Area	Title	Description	Value	EXAMPLE
LDAP	LDAP - Ignore Desktop Client Domain		Yes/No	Default is NO.

Messaging

Area	Title	Description	Value	EXAMPLE
Messaging	Number of concurrent emails that can be sent by one platform service instance.	This parameter is not used by any EMS application. It will be removed in an upcoming update.		

Notifications

Area	Title	Description	Value	EXAMPLE
Notifications	Allow Users To Delete Notifications	When set to YES, this parameter allows users to delete notifications from the Dashboard.	Yes/No	
Notifications	Exclude Building Closures On Notifications	When set to NO, building closures are not excluded from notification date calculations.	Yes/No	Parameter is set to YES. A Building is closed on the 9th, 10th and 11th (three days). Today is the 4th. A notification is set to trigger within 10 days. Something is done on the 16th that triggers the notification. IT WILL be triggered because even though the 16th is more

Area	Title	Description	Value	EXAMPLE
				than 10 days away from the 4th, we are subtracting (excluding) three days. Next, something is done on the 18th that triggers the notification. It will NOT trigger because the 18th is 14 days from the 4th and when you subtract three closed days - you are outside of 10 days. IF BOTH EXCLUDE BUILDING CLOSURES ON NOTIFICATIONS AND EXCLUDE WEEKENDS ON NOTIFICATIONS ARE SET TO YES, ADD NUMBER OF DAYS EXCLUDED TOGETHER IN CALCULATION. BOTH WILL BE TAKEN INTO ACCOUNT.
Notifications	Exclude Weekends On Notifications	When set to NO, weekends are not excluded from notification date cal-culations.	Yes/No	Parameter is set to YES. Group notification is set to remind Group 10 days prior to booking. Today is Wednesday the 4th and a meeting will take place on Wednesday the 18th. Therefore, a reminder notification will get triggered to the recipient on Wednesday the 4th because that is 14 days less four weekend days (thus 10 days).

Area	Title	Description	Value	EXAMPLE
				Note: If a Group reminder is set to be sent at 4 pm and the bookings on the 18th ends before 4 pm, no Group reminders will be triggered. No reminders will go to recipients who have bookings that end before notification is to be sent. If both the "Exclude Building Closures on Notifications" and "Exclude Weekends on

Area	Title	Description	Value	EXAMPLE
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.		999

Platform

Area	Title	Description	Value	EXAMPLE
Platform	Allow multiple platform sessions to share the same token.	If set to YES, EMS Platform Services will return the "same" value user token if multiple calls to authentication are made. If set to NO, EMS Platform Services will generate a new token for each authentication call. The Default value of the parameter is YES.	Yes/No	If set to YES, a user will be able to log into the same application (e.g., mobile) on multiple devices. If set to NO, the user will have only one active session for an application on one device. As soon as the user logs on to the same app on the other device, he will be logged out of the first app.

Reports

Area	Title	Description	Value	EXAMPLE
Reports	Calendar Inquiry Print Format	Default format for		A calendar

Area	Title	Description	Value	EXAMPLE
		the Event Calendar report. Formats are configured in **Configuration** > **Other** > **Calendar Styles**.		format could be created to show just certain fields and for only certain buildings, event types and statuses (e.g., a calendar of G building events in confirmed status for only Public Meeting event types).
Reports	Confirmation Summary Room Description Format	Determines how room information is displayed when sending the "Summary" format of the Confirmation in an email body text. Options are Building Code + Room Code or Building Description + Room Code.	Building Code Room Code, Building Description Room Code	
Reports	Include Activities on Service Order Forms	If disabled, Activities-type Categories are not included on Service Order reports.	Yes/No	
Reports	Include Catering Details on Setup Worksheet	If enabled, Resource Items within Catering-type Categories are displayed on the Setup Worksheet report.	Yes/No	Typically set to YES so reports will show all details of the Catering order.
Reports	Include this Notes Category on Service Order Forms	Determine which Notes-type Category, if any, is included on Service Order reports. Only one Notes-type Category can be selected for all Service	Yes/No	A customer can create a Notes Category called "Catering Notes." If this

Area	Title	Description	Value	EXAMPLE
		Orders.		Category is selected in this parameter, the "Catering Notes" will print on the Service Order Forms.
Reports	Room Description Format	Determines how room information displays on reports and the detailed Confirmation. Options are Room Code or Room Description, with or without Building Code.	Building Code Room Code, Building Code Room Description, Room Code, Room Description	Room Description typically gives a better description of the room as the Room Description field holds more characters.
Reports	Use Calendar Styles	Select YES to enable the use of calendar styles on the Event Schedule report and on the Event Calendar report. Calendar Styles are created in the EMS Desktop Client under **Configuration** > **Other** > **Calendar Styles**.	Yes/No	A Calendar Style could be created to show a unique font, font style, size, color. This Calendar Style can be attached to a Reservation. If this parameter is set to YES, on the report, the booking will adopt the Calendar Style and "stand out."

Reservations

Area	Title	Description	Value	EXAMPLE
Reservations	Allow Bookings To Be Added To Outlook Per-	If enabled,	Yes/No	

Area	Title	Description	Value	EXAMPLE
	sonal Calendar	EMS Desktop Client users can select an Outlook option in the Navigator, Browser, and Calendar to add bookings to their personal calendars. Users must have Outlook application locally installed. Does not create an ICS file and/or work with other mail exchange systems (e.g., Gmail). If the booking gets changed or canceled, the event will remain on the calendar as originally placed.		
Reservations	Book Building Closed Color	The color that displays in the Reservation Book to indicate building closures.	Infinite Color Options	
Reservations	Book Special Date Color	The color that displays in the Reservation Book to designate special dates.	Infinite Color Options	
Reservations	Book Weekend Color	The color that displays in the Reser-	Infinite Color Options	

Area	Title	Description	Value	EXAMPLE
		vation Book to designate week-ends.		
Reservations	Building Display	Indicates how building inform-ation is displayed in reservations within the desktop client—by Building Code (if one exists) or Building Descrip-tion.	Building Code, Building Descrip-tion	Building Code Room Code.
Reservations	Default Event Coordin-ator	If this is set to YES, and an EMS Desktop Cli-ent user's ID is flagged as an Event Coordin-ator, every reser-vation that the EMS Desktop Cli-ent user makes from the Desktop Client will be pop-ulated with his/her name in the Event Coordin-ator field in the Reservation. If the EMS Desktop Cli-ent user's ID is not flagged as an Event Coordinator and this para-meter is set to YES, the Event Coordinator field	Yes/No	Default is NO.

Area	Title	Description	Value	EXAMPLE
		will be required but and another Event Coordinator will need to be selected.		
Reservations	Exclude Room Charge from Services indicator	In various locations in the EMS Desktop Client (e.g., the Book, the Navigator, and Editing a Booking), a visual indicator is provided when services (i.e., Categories) exist for a booking. If this parameter is enabled, then the "Room Charge" Category is excluded from displaying as a service on the booking.	Yes/No	Typically set to NO, as most customers do not consider Room Charge to be a "service."
Reservations	Lock Booking Details If Booking Is Locked	This parameter works in tandem with "Lock Bookings Older Than 'xx' days." If a booking is locked due to age, booking details within the booking are also locked if Parameter is set to YES. However, if	Yes/No	A customer can lock a booking date/time but be able to edit the booking details. In this scenario, it doesn't matter if the booking is locked

Area	Title	Description	Value	EXAMPLE
		this parameter is set to NO, the booking details remain editable, even though the booking is locked.		because of the "lock bookings older than XX days" or booking is locked because of being invoiced.
Reservations	Lock Bookings Older Than 'xx' Days	Past bookings beyond this number of days are automatically locked and cannot be edited.	Numeric	A customer needs to provide a numeric value for the number of days to lock bookings from being edited so that EMS Desktop Client users cannot change historical data past XX days.
Reservations	Lock Occurring/Past Reservations For Non-Administrators	If enabled, users without administrator access cannot edit the Reservation Level once a booking within the Reservation is in the past.	Yes/No	A customer can enable this parameter so the Group does not get changed on a recurring reservation. Changing the Group on a reservation that has book-

Area	Title	Description	Value	EXAMPLE
				ings in the past makes it seem as though the new Group has always had this reservation when in fact, they did not.
Reservations	Notifications/Automated Reports Data Format	Controls how the date appears within Group Notification Emails or Automated Report emails.	Short, International, Long	
Reservations	Reservation Book 'Checked In' Color	Color of bookings in the Book that have been checked in. Use of this color is controlled in the Book under Options.	Infinite Color Options	
Reservations	Reservation Book 'Not Checked In' Color	Color of bookings in the Book located in rooms that do not require check-in. Use of this color is controlled in the Book under Options.	Infinite Color Options	
Reservations	Reservation Book 'Room Does Not Require Check In' Color	Color of bookings in the Book that have not been checked in. Use of this color is controlled in the Book	Infinite Color Options	

Area	Title	Description	Value	EXAMPLE
		under Options.		
Reservations	Room Display	Indicates how room information is displayed in reservations within the EMS Desktop Client—by Room Code or Room Description.	Room Code, Room Description	
Reservations	Use Billing Reference Allocation	Enables an EMS user to allocate reservation, booking, or service order charges across multiple Billing Reference numbers by percentage.	Yes/No	When this parameter is set to YES, a tab will appear at the Reservation Level "Billing Reference Allocation." This is the area where you can allocate, by percentage to different Billing Reference Numbers. This information will print on the Confirmation if the box Print Billing Reference Allocation is checked on the Options

Area	Title	Description	Value	EXAMPLE
				tab of the Confirmation. This allocation will also be reflected on the Sales by Billing Reference report.
Reservations	Use PO Number Allocation	Enables an EMS user to allocate reservation, booking, or service order charges across multiple PO Numbers by percentage.	Yes/No	When this parameter is set to YES, a tab will appear at the Reservation Level "Purchase Order Allocation." This is the area where you can allocate, by percentage to different Purchase Order Numbers. Typically set to NO.
Reservations	Validate Billing Reference	Validates the Billing Reference entered against the Billing Reference table. Specify No Validation, Valid Only, or Warning for Invalid (Blanks Are	No Validation, Valid Only, Warning For Invalid (Blanks Are Invalid), Warning For Invalid (Blanks Are Valid)	

Area	Title	Description	Value	EXAMPLE
		Invalid), or Warning for Invalid (Blanks are Valid).		
Reservations	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).	No Validation, Valid Only, Warning For Invalid (Blanks Are Invalid), Warning For Invalid (Blanks Are Valid)	
Reservations	Validation of Building Hours	How Building Hours are validated for new or existing bookings in the EMS Desktop Client—either by Reserved Time (i.e., with Setup and/or Teardown Time) or Event Time.	On Reserved Time, On Event Time	Parameter is set to Event Time and Building Hours are set at 8 am - 5 pm and the EMS Desktop Client user inputs 7 am as event start time. As a result, on the second screen of the wizard, the user will be alerted that booking exceeds building hours.
Reservations	Warn When Booking More Than 'xx' Months in Future	If a user attempts to create a book-	12	

Area	Title	Description	Value	EXAMPLE
		ing with a date past xx months, a warning displays. The warning does not prevent booking creation.		

Resources

Area	Title	Description	Value	EXAMPLE
Resources	Check Inventory When Using Reservation Tools	If enabled, resource availability is verified when Booking Details are copied, Reservations are copied, or the date/time/room is changed for multiple bookings.	Yes/No	Typically set to YES.
Resources	Use Resource Selector	If enabled, a Resource Selector window is available when adding Booking Detail Items.	Yes/No	Typically set to YES. Customers will set to NO when they want to edit the resource or add notes/special instructions at the same time as adding the resource to the booking.

Service Orders

Area	Title	Description	Value	EXAMPLE
Service Orders	Auto Adjust Service Order Times	If enabled, Service	Yes/No	Typically set to YES.

Area	Title	Description	Value	EXAMPLE
		Order Times are automatically adjusted when a booking's date and/or time 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.	(none), Event Time, Reserved Time	Parameter is set to RESERVE TIME, a booking made from 8 am - 12 pm with 30 minutes of setup for 10 people. Resources with a Service Order type category is added and will have 7:30 am - 12 pm automatically defaulted as the start and end time with a count of 10. This parameter will take precedence over what is set at the Category level. In order for setup to calculate, default quantity must be set to Setup count on the Category.
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.	Yes/No	Typically set to NO. This was created for a specific customer and integration.

System

Area	Title	Description	Value	EXAMPLE
System	Campus Planning Interface - Use Integrated Authentication Only	Enables Integrated Authentication as the only authentication method for the Campus Planning Interface. The Network ID field must be completed for any client user who will also use the Campus Planning Interface.	Yes/No	
System	Custom Calendaring Icon	Allows you to upload a custom icon for the EMS for Outlook add-in. The recommended image size is 32 x 32 pixels. See Also: Customize the Add-in icon.		
System	Dashboard Check Interval	Indicates how frequently the Dashboard should check for updates.	5 Minutes, 10 Minutes, 15 Minutes, 30 Minutes, 1 Hour	

Area	Title	Description	Value	EXAMPLE
		Note: Setting this for more frequent updates might impact application performance.		

Area	Title	Description	Value	EXAMPLE
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.)	Yes/No	
System	NetworkID Login - Ignore Desktop Client Domain	Setting to YES, causes EMS Desktop Client to ignore the domain when using Integrated Authentication, which is useful if you leverage multiple domains.	Yes/No	If a user logs in under the domain EMS\username, this parameter causes EMS Desktop Client to overlook the "EMS" portion of the credentials and still enable user login even though they are authenticating via a different domain.
System	Platform Services Desktop Secret Key	This is the secret the EMS Desktop Client will use when communicating with EMS Platform Services. It is required only for G-Suite.		For more information, click here.
System	Server Time Zone	Sets the time zone for the server to the indicated value.		Affects how times get calculated for date calculations, dashboard notifications, all kinds of stuff. You see issues when this isn't set to what the server actually is.

Area	Title	Description	Value	EXAMPLE
				This was removed for EMS Cloud Services customers so they can't change it (because they have no control over the actual servers).
System	Use Integrated Authentication Only	If set to YES, then EMS users are required to manually log-in and authenticate against LDAP.	Yes/No	
System	Warn within XX% of Everyday User Licensing Limit	Creates a prompt to expert user upon login if number of Everyday Users is within a certain percentage of the licens-ing limit.	99	This alerts EMS Desktop Client users that they are reaching their Everyday User limit.

EMS Desktop Client — Academic Planning (Campus) Optional Parameters

EMS Desktop Client -- Academic Planning parameters are broken into the following Areas:

- Academic Import
- Campus

Academic Import

Area	Title	Description	Value	EXAMPLE
Academic Import	Academic Import Days Of The Week	Indicates how EMS determines the days of the week in import data. Whenever this parameter is changed, any existing	Specific Tex-t/Positional, Monday First/Pos-itional, Sunday First	

Area	Title	Description	Value	EXAMPLE
		(already created) Academic Import Sessions will still reflect the old parameter settings, even if you haven't yet imported a file. If you change this parameter and then need to load a file using the new setting, if you have already created the Session, it needs to be deleted and recreated. Any future Sessions created after changing this parameter will use the updated parameter value.		

Campus

Area	Title	Description	Value	EXAMPLE
Campus	Academic Book Course Color	Color used for courses displayed in the Academic Book.	Color Picker	Green
Campus	Academic Book Crosslisted Course Color	Color used for cross-listed courses displayed in the Academic Book.	Color Picker	Purple
Campus	Academic Unit Title Plural	System-defined label for Academic Units.	Text	Departments

Area	Title	Description	Value	EXAMPLE

Area	Title	Description	Value	EXAMPLE
		Note: Typically renamed to "Departments."		

Area	Title	Description	Value	EXAMPLE
Campus	Academic Unit Title Singular	System defined label for Academic Unit.	Text	Department

Area	Title	Description	Value	EXAMPLE
		Note: Typically renamed to "Department."		

Area	Title	Description	Value	EXAMPLE
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). This only applies to courses that are manually marked as Shared Space in EMS; it does not apply to cross-listed courses.	YES/NO	Typically set to "Yes."
Campus	Allow Cross-Domain Cross Listings	If set to "YES," this indicates that courses can be cross-listed across multiple domains.	YES/NO	Typically set to "NO."

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if courses will be manually		

Area	Title	Description	Value	EXAMPLE
Campus	Allow Sync of Academic Units from Student Information System		YES/N-O	Typically set to "NO."

Area	Title	Description	Value	EXAMPLE
Campus	Auto Sync - Automatically Process Cancellations	If auto-sync is enabled, then course cancellations in your Student Information System are automatically processed in EMS.	YES/N-O	Typically set to "YES."

Area	Title	Description	Value	EXAMPLE
		Note: Auto Process must also be enabled.		

Area	Title	Description	Value	EXAMPLE
Campus	Auto Sync - Automatically Process Courses not assigned to a Room	If auto-sync is set to "YES," then new courses without a room in your Student Information System are automatically processed in EMS into the "TBD" room for the domain.	YES/N-O	Typically set to "NO."

Area	Title	Description	Value	EXAMPLE
		Note: Auto Process must also be enabled.		

Area	Title	Description	Value	EXAMPLE
Campus	Auto Sync - Automatically Process Room Capacity Violations	If auto-sync is set to "YES," if a new course is added in your Student Information System that violates room capacity, then the course is automatically processed in EMS (bypasses the Dashboard).	YES/N-O	Typically set to "NO."

Area	Title	Description	Value	EXAMPLE
		Note: Auto Process must also be enabled.		

Area	Title	Description	Value	EXAMPLE
Campus	Auto Sync User	The EMS user account that is used by the auto-sync service for authentication.	Drop-down	Set to the Auto Sync user account that was created; usually "Auto Sync."
Campus	Course User Defined Field 01	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 02	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 03	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 04	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 05	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 06	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 07	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 08	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 09	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
Campus	Course User Defined Field 10	Maps an EMS user-defined field to a custom field in your Student Information System.	Course Type User Defined Field (Drop-down List)	"Secondary Instructor"

Area	Title	Description	Value	EXAMPLE
		Note: Only needed if customization has been com		

Area	Title	Description	Value	EXAMPLE
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.	Text	U
Campus	Day Label 2 - Monday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is M.	Text	M
Campus	Day Label 3 - Tuesday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is T.	Text	T
Campus	Day Label 4 - Wednesday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template	Text	W

Area	Title	Description	Value	EXAMPLE
		configuration area. The default value is W.		
Campus	Day Label 5 - Thursday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is R.	Text	R
Campus	Day Label 6 - Friday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is F.	Text	F
Campus	Day Label 7 - Saturday	Determines the label that indicates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is S.	Text	S
Campus	Default Cancel Reason	Used for courses when publishing a term.	Drop-down	"Canceled in Student Information System"

Area	Title	Description	Value	EXAMPLE

Area	Title	Description	Value	EXAMPLE
		Note: Allows users to run reports and filter in		

Area	Title	Description	Value	EXAMPLE
Campus	Default Event Type	Used for courses when publishing a term.	Drop-down	"Course"
Campus	Default Group	Used for courses when publishing a term.	Drop-down	"Registrar's Office"

Area	Title	Description	Value	EXAMPLE
		Note: Must have a value in order to publish a		

Area	Title	Description	Value	EXAMPLE
Campus	Default Reservation Source	Used for courses when publishing a term.	Drop-down	"Student Information System"
Campus	Default Seat Fill Percentage	Used to determine an appropriate room size for a class of a specific estimated enrollment (typically 100%).	Numeric	100

Area	Title	Description	Value	EXAMPLE
		Note: This is only used when optimizing courses		

Area	Title	Description	Value	EXAMPLE
Campus	Default Setup Type	Used to build a setup type and capacity (from the Student Information System) when synchronizing rooms (typically “classroom”).	Drop-down	"Academic Style"

Area	Title	Description	Value	EXAMPLE
		Note: Must be set prior to synchronizing Rooms f		

Area	Title	Description	Value	EXAMPLE
Campus	Domain Title Plural	System defined label for Domains (typically renamed to “Campuses”).	Text	"Campuses"
Campus	Domain Title Singular	System defined label for Domain (typically renamed to "Campus").	Text	"Campus"
Campus	Final Exam Event Type	Used when creating a final exam booking.	Drop-down	"Exam"

Area	Title	Description	Value	EXAMPLE
		Note: This parameter is used in conjunction with		

Area	Title	Description	Value	EXAMPLE
Campus	Include CRN in Reservation Event Name	Include the Course Reference Number (CRN) in front of the event name post-publish in all areas of EMS Campus where the event name is used.	YES/N-O	"NO"

Area	Title	Description	Value	EXAMPLE
		Note: This parameter always adds the CRN to the		

Area	Title	Description	Value	EXAMPLE
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 Confirmed/Crosslist status and not Conflict.	YES/N-O	"YES"

Area	Title	Description	Value	EXAMPLE
		Note: For example, BIO 110 01, BIO 111 01, and		

Area	Title	Description	Value	EXAMPLE
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. See Also: Room Optimization.	Numeric	50

Area	Title	Description	Value	EXAMPLE
		Note: This is also how the cutoffs are based in		

Area	Title	Description	Value	EXAMPLE
Campus	Large class size weight adjustment	Used to determine the optimization weighting for a "large" class. See Also: Room Optimization.	Numeric	30

Area	Title	Description	Value	EXAMPLE
		Note: This parameter determines how many potenti		

Area	Title	Description	Value	EXAMPLE
Campus	Lock Academic Unit Room access	Used during optimization process. If set to Yes, a room will be assigned to an Academic Unit's (i.e., Department) course only if that Academic Unit owns the room.	YES/NO	"NO"
Campus	Manually update Student Information System/ERP System after Publishing	If set to "NO," course location in the Student Information System will be automatically updated during the publishing process.	YES/NO	"YES"
Campus	Student Information System/ERP Title	System defined label for Student Information System/ERP (typically "Student Information System").	Text	Banner
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. See Also: Room Optimization.	Numeric	25

Area	Title	Description	Value	EXAMPLE
		Note: This also determines how the cutoffs are		

Area	Title	Description	Value	EXAMPLE
Campus	Small class size weight adjustment	Used to adjust the optimization weighting for a “small” class.	Numeric	-100

Area	Title	Description	Value	EXAMPLE
		Note: Determines how many potential extra points		

Area	Title	Description	Value	EXAMPLE
Campus	Subject Title Plural	System defined label for Subjects (typically “Subjects”).	Text	"Subjects"
Campus	Subject Title Singular	System defined label for Subject (typically “Subject”).	Text	"Subject"
Campus	Sync Course Dates Without Start/End Times	If set to No, Courses with incomplete course date records (e.g., missing start/end times or dates) will not be imported into EMS Campus.	YES/NO	"NO"

Area	Title	Description	Value	EXAMPLE
		Note: Only works for missing start/end times; co		

Area	Title	Description	Value	EXAMPLE
Campus	Web Service URL	The URL to the EMS Campus Web Service.	Text	https://www.school.edu/EMSCampusWebService/EMSCampusService.asmx

Area	Title	Description	Value	EXAMPLE
		Note: This parameter must be filled out with the		

CHAPTER 149: EMS System Parameters

Everyday User Applications

Parameters for Everyday User Applications are broken out into the following **Areas**:

- Account Management
- Authentication
- Booking Details
- Browse Events
- Browse Locations
- Create/Manage Reservations
- Email
- Email - Settings
- EMS for Outlook - Specific
- Floor Mapping
- General
- Home Page
- Labels
- Mobile-Specific
- My Events
- Schedule View
- Services
- Skype for Business
- System
- Unauthenticated Requests

Account Management

Area	Title	Description	Value	EXAMPLE
Account Management	Allow Email My Password	Allows Everyday Users to email their passwords to themselves.	YES/NO	Typically set to NO if customer is using Single Sign On.

Area	Title	Description	Value	EXAMPLE
Account Management	Allow Everyday User to Opt-Out of Automatic Emails	Allows Everyday Users to specify if they want to receive or opt out of any automatic emails (e.g., automatic confirmations or cancellations) from EMS Web App.	YES/NO	Everyday Users can log into the EMS Web App, navigate to My Account, and click the box "I do not want to receive e-mails from EMS Software" if this parameter is set to YES.
Account Management	Auto Create Everyday User Account (for Integrated Authentication)	An Everyday User account is automatically created via the integrated authentication process if a new user accesses the EMS Everyday User Application. (EMS Web App)	YES/NO	
Account Management	Automatically Set Everyday User Time Zone to First Buildings Time Zone On Login	After an Everyday 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 Locations drop-down list, then the time zone is set to the first available time zone on the Time Zone drop-down list, but the user can always select a different value if one is available.	YES/NO	Everyday Users can log into the EMS Web App, navigate to My Account, and set Time Zone preference.

Area	Title	Description	Value	EXAMPLE
Account Management	Default Account Status for Newly-Created User	Default status (Active or Pending) for new Everyday User accounts, regardless of account creation method.	Active/Pending	
Account Management	Default Security Template for User	The default Web Security template that is assigned to new Everyday Users when their account is created.		Dependent on what Security Templates have been created. Parameter must be populated before the EMS Web App can be used.
Account Management	Manual Account Creation - Password Reset Email	Email text sent as a security measure to an Everyday User who has requested reset of their account password. Not recommended for organizations who utilize integrated authentication.		
Account Management	Manual Account Creation - Password Reset Success Email	Email text sent to an Everyday User to confirm reset of their password. Not recommended for organizations who utilize integrated authentication.		
Account Management	Manual Account Creation - Request	Email text sent to a potential web app user		

Area	Title	Description	Value	EXAMPLE
	Received Email	to confirm their request for an account has been received. Applicable to organizations whose allow account requesting instead of automatic account creation.		
Account Management	Manual Account Creation - Sign Up Confirmation Email	Email text sent to a potential web app user as a security measure to confirm their request for an account. Applicable to organizations whose allow automatic account creation instead of account requesting.		
Account Management	Manual Account Creation - Sign Up Success Email	Email text sent to a new EMS Web App user to confirm their account has been created and is active. Email is sent as a result of the user selecting the link within the sign up confirmation email. Applicable to organizations whose allow automatic account creation instead of account requesting.		
Account Management	Require Phone during account creation	Requires the potential Everyday User to complete Phone 1 during manual account creation.		

Authentication

AREA	Title	Description	Value	EXAMPLE
Authentication	Enable persistent authentication for supported applications			For Everyday User applications that support authentication that is not through EMS Platform Services, this parameter allows users to remain authenticated across sessions.
Authentication	Field Used to Authenticate Everyday User	Indicates the field (Email Address, Network ID, or External Reference) that is used to authenticate an Everyday User.		
Authentication	Label for Login box	The label for the User ID field on the Login page.		User ID, E-Mail address
Authentication	Portal Authentication Cookie Key	Appropriate variable to be used if Portal Authentication is enabled by your organization and the parameter Portal Authentication Method is set to "Cookie."		
Authentication	Portal Authentication Email Variable	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."		
Authentication	Portal Authentication External Reference Variable	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."		

AREA	Title	Description	Value	EXAMPLE
Authentication	Portal Authentication Fax Variable	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."		
Authentication	Portal Authentication Method	Method of Portal Authentication to be used, if enabled by your organization. Choices are Form, Server Variable, Session, Querystring, and Cookie.		
Authentication	Portal Authentication Name Variable	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."		
Authentication	Portal Authentication Phone Variable	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."		
Authentication	Portal Authentication Variable	User variable to be compared against the EMS Everyday User External Reference or Network ID fields if your organization has enabled Portal Authentication. This parameter works in tandem with the choice selected for the parameter Portal Authentication Method (Form, Session, ServerVariable, Cookie, Querystring).		

AREA	Title	Description	Value	EXAMPLE
Authentication	Use SAML 2.0 Authentication for User Authentication Web App Only			

Booking Details

AREA	Title	Description	Value	EXAMPLE
Booking Details	Make Add to Personal Calendar Link Appear	If enabled, the Add to Personal Calendar link is displayed when the Everyday User views the event details in either Reservation Summary or Reservation Details - Reservation Tasks		If this is an Exchange-enabled template, the booking (s) will already be on the Everyday User's calendar. Having this enabled allows end users to add a booking they just made to their calendar if the template is not "exchange enabled." Keep in mind, if the Everyday User changes or cancels the booking(s), the booking(s) remain on the calendar - (if using this method).
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.		From Browse Events, on the calendar - allows user to add events to Facebook, Twitter,

AREA	Title	Description	Value	EXAMPLE
				Pinterest, Linked In, Tumbler - by clicking on "share" from the Event. Not typically used by Corporate customers.

Browse Events

AREA	Title	Description	Value	EXAMPLE
Browse Events	Browse Event Default Display Format	Determines the initial format in which the Browse Events function displays information. Options are: Daily, Weekly, Monthly.		Typically set to Daily.
Browse Events	Collapse Related Bookings to Start Times on Weekly/Monthly Views	If more than one booking within a reservation takes place on the same day, enabling this parameter will collapse the bookings into a single entry per Start Time. Only applies to Weekly and Monthly view.	YES/NO	If a reservation has two bookings starting at same time and this parameter is set to YES, then the booking will be listed once with "multiple bookings" under the title.
Browse Events	Hide Past Events From View	If enabled, events from the past will no longer appear in Browse Events.	YES/NO	
Browse Events	Maximum Number of Events/Day to Display in Daily View	Controls the number of events that are available for display, per day, in the daily views of the Browse Events function.		

AREA	Title	Description	Value	EXAMPLE
		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	Controls the number of events that are available for		

AREA	Title	Description	Value	EXAMPLE
	Display in Weekly View	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	Show End Time in Browse Events	If this option is set to NO, only start time is shown in Browse Events.	YES/NO	Typically set to YES.
Browse Events	Show Group Name in Daily View of Browse Events	If set to YES, then the name of the group that is holding an event is shown in Browse Events.	YES/NO	There are some cases when EMS customers do not want the Group to be displayed on 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.	YES/NO	There are some cases when EMS customers do not want the Group Type to be displayed on Browse Events.

AREA	Title	Description	Value	EXAMPLE
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.	YES/NO	
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.	YES/NO	Typically set to NO if all the rooms in the template have the same "room type."

Browse Locations

AREA	Title	Description	Value	EXAMPLE
Browse Locations	Room Name Format in Browse Locations	Determines how room information is formatted in Browse Locations. Options are Room Description or Room Code	Room Description/Room Code	

Create/Manage Reservations

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Allow Billing Reference Lookup	If set to YES, a user can look up pre-configured Billing References in the Reservation Details. Pre-configured Billing References can exist in the EMS Desktop Client on a Group record or in the global Billing Refer-	YES/NO	

AREA	Title	Description	Value	EXAMPLE
		ences list under **Configuration** > **Billing** > **Billing References**.		
Create/Manage Reservations	Allow PO Number Lookup	If set to YES, a user can look up pre-configured PO Numbers in the Reservation Details. Pre-configured PO Numbers can exist in the EMS Desktop Client on the Group record or in the global PO Numbers list under **Configuration** > **Billing** > **PO Numbers**.	YES/NO	
Create/Manage Reservations	Allow Temporary Contacts	If set to YES, then a user can specify a temporary contact when making a reservation. Temporary contacts are not saved to the Group record.		A "temporary contact" is one in which an Everyday User types in the name of a contact. Might be used in the case where the regular contact is not applicable to this meeting (e.g., this is the "back up contact").
Create/Manage Reservations	Attachments Allowed Extensions	The allowed attachment types for room requests.		
Create/Manage Reservations	Attachments Allowed on Room Request	Controls whether users can submit an attachment as part of		**WARNING**: These attachments are stored in the EMS

AREA	Title	Description	Value	EXAMPLE
		creating a reservation.		Database.
Create/Manage Reservations	Billing Reference Validation	Controls what options exist for requiring and validating Billing References. Validation occurs against preconfigured Billing References in the EMS Desktop Client, either on a Group record or in the global Billing References list under **Configuration** > **Billing** > **Billing References**.		
Create/Manage Reservations	Default Cancel Reason	Whatever "reason" is selected, when a person cancels a booking, this will be the reason. Additionally, there is a report that the cancel reasons can be seen.		
Create/Manage Reservations	Default Pricing Plan	Indicates the default pricing plan that is used to display pricing.		If "Show Room Pricing" and/or "Show Resource Pricing" are set to YES, then the prices that are displayed on the EMS Web App are based on whatever Pricing Plan is set in this parameter.

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Default Room Availability View	When a user searches for available rooms, this parameter drives the default display. Options are Grid, List or Floor Map.	Grid/List/Floor Map	Everyday Users can override by logging into the EMS Web App, navigating to **My Account** > **Personalization**, choosing a template and editing. Everyday Users can change default display.
Create/Manage Reservations	Default Value for Attendance			Often on a template created for booking a workspace, this is defaulted to "1" so that the Everyday User does not have to input a number. Reduces steps/clicks.
Create/Manage Reservations	Delay for Type Ahead Search Trigger (ms)	Affects all type-ahead search fields. Administrators can specify the duration after the last keystroke entry before triggering the search call for attendees. The default is **400 ms**.	400 ms, 600 ms, 800 ms, or 1000 ms	This parameter enables administrators to specify a longer duration after the last keystroke entry to prevent performance issues when returning attendee results.
Create/Manage Reservations	Exclude Closures From Date Calculations	If set to YES, closures are not taken into account on booking rule date cal-		If set to YES, the date of the building closure is

AREA	Title	Description	Value	EXAMPLE
		culations.		ignored and skipped when calculating date range booking rules.
Create/Manage Reservations	Exclude Weekends From Date Calculations	If set to YES, weekends are not taken into account on booking rule date calculations.		If set to YES, weekends are ignored and skipped when calculating date range booking rules. Weekend is defined as Saturday and Sunday.
Create/Manage Reservations	Hide Daily Recurrence Option	Hide the daily recurrence option on the Room Request page.	YES/NO	If set to YES, the Everyday User will not be able to make a daily recurrence reservation on the EMS Web App. "Daily" will not be in the dropbox.
Create/Manage Reservations	Hide Monthly Recurrence Option	Hide the monthly recurrence option on the Room Request page.	YES/NO	If set to YES, the Everyday User will not be able to make a monthly recurrence reservation on the EMS Web App. "Monthly" will not be in the dropbox.
Create/Manage Reservations	Hide Random Recurrence Option	Hide the random recurrence option on the Room Request	YES/NO	If set to YES, the Everyday User

AREA	Title	Description	Value	EXAMPLE
		page.		will not be able to make a random recurrence reservation on the EMS Web App (e.g., Tuesday, Saturday, Sunday).
Create/Manage Reservations	Hide Weekly Recurrence Option	Hide the weekly recurrence option on the Room Request page.	YES/NO	If set to YES, the Everyday User will not be able to make a weekly recurrence reservation on the EMS Web App. "Weekly" will not be in the dropbox.
Create/Manage Reservations	Minimum Characters to Initiate Type Ahead Search	Affects the Find Attendees search field in calendar-enabled templates (Exchange and G Suite). Administrators can specify the minimum character count to initiate type-ahead searches. The default is **3** characters.	Positive Integer	This parameter enables administrators to set the minimum character search length at a higher value to prevent performance issues when returning attendee results. Updates recommended only for organizations with complex Exchange or G Suite deployments.
Create/Manage Reservations	Number of Available Rooms	Specify the number		Limiting the num-

AREA	Title	Description	Value	EXAMPLE
	upon Search	of available rooms listed at a time in search results in EMS Web App only.		ber of rooms displayed in a search results can assist in performance and a better user experience if a template or search criteria would return 1000's of results. The recommended setting is 250.

AREA	Title	Description	Value	EXAMPLE
		Note: This parameter is ignored for EMS for Outl		

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Only Display Rooms That Exact Match Search Criteria		YES/NO	Typically set to YES. If set to NO, rooms that are not part of the exact search criteria are displayed. This attempts to prevent the Everyday User from coming up with no results.
Create/Manage Reservations	Override Default Room Setup/Teardown Times	Ability to override the setup and tear down time configured on the room.	YES/NO	If set to "YES, the default setup/teardown times defined for a room are ignored and the values for Setup Time in Minutes for All Rooms and Teardown Time in Minutes for All Rooms parameters are used instead. These parameters are usually configured for video conference (VC) bookings where setup/teardown times for participating rooms can differ. This parameter works in tandem with "Setup Time in Minutes for All

AREA	Title	Description	Value	EXAMPLE
				Rooms" and "TeardownTime in Minutes for All Rooms".
Create/Manage Reservations	PO Number Validation	Controls what options exist for requiring and validating PO Numbers. Validation occurs against pre-configured PO Numbers in the EMS Desktop Client, either on a Group record or in the global PO Numbers list under **Configuration** > **Billing** > **PO Numbers**.		OPTIONS: No Validation; Required but not Validated = PO number is required on EMS Web App and EMS for Outlook but is not validated against pre-configured PO numbers; Required and Validated = PO Number is required on EMS Web App and EMS for Outlook and is validated against pre-configured PO numbers. Works in tandem with Show PO Number on Reservation.
Create/Manage Reservations	Require Contact Email	Specify NO or YES to require contact email at checkout.	YES/NO	

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Require Contact Phone	Specify NO or YES to require a contact phone number at checkout.	YES/NO	
Create/Manage Reservations	Reservation Comment Type on Checkout	Reservation-level Comment to be displayed in the Reservation Details when creating a Reservation. Comment must be configured to Display on Web and include Display Text. Only one Reservation-level Comment per Web Process Template allowed. Comments are configured in the EMS Desktop Client under **Configuration** > **Other** > **Comment Types**.		This might be used by a customer to capture more information about the Event. Example a Comment might be created called "Event Details" and Everyday User could type in more information about the event.
Create/Manage Reservations	Reservation Source for New Reservation	Specify the only reservation source for all reservations made through the EMS Web App.		EMS Web App
Create/Manage Reservations	Setup Time in Minutes For All Rooms	If enabled, the default setup time defined for a room is ignored and this parameter's value is used instead. The parameter Override Default Room		If enabled, the default setup time defined for a room is ignored and this parameter's value is used instead. The parameter Over-

AREA	Title	Description	Value	EXAMPLE
		Setup/Teardown Times must also be enabled. This parameter is usually configured for video conference (VC) reservations where setup/teardown times for participating rooms can differ.		ride Default Room Setup/Teardown Times must also be enabled. This parameter is usually configured for VC reservations where setup/teardown times for participating rooms can differ.
Create/Manage Reservations	Setup Type Validation Rule	Determines how Setup Type and Attendance are displayed and handled against room capacities. Four options are available: • **No Setup and No Validation**: Do not show the Setup Type field and do not validate the Attendance value against room minimum and maximum capacities. • **Validate But Don't Show**: Do not show the Setup Type field but validate the Attendance value against		

AREA	Title	Description	Value	EXAMPLE
		room minimum and maximum capacities. • **Show and Validate**: Show the Setup Type field and validate the Attendance and Setup Type against all Setup Type and Capacity pairings for rooms. • **Show But Don't Validate**: Show the Setup Type field but do not validate Setup Type or Attendance.		
Create/Manage Reservations	Show 2nd Contact	If set to YES, then the 2nd Contact Name, Phone 1, Phone 2, and Email Address fields are displayed in the Reservation Details.		
Create/Manage Reservations	Show Additional Filters Initially	If set to YES, then by default, room searching filters are made immediately available to the everyday user. In the EMS Web App, filters are available under "Let Me Search for a Room."	YES/NO	

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Show Attendance on Room Request	Controls whether the Number of People field appears as part of searching for a Room.	YES/NO	Typically set to NO on a "Book a Workspace" template and default attendance is set to 1.
Create/Manage Reservations	Show Billing Reference on Reservation	If set to YES, the Billing Reference is displayed in the Reservation Details.	YES/NO	
Create/Manage Reservations	Show Feature Filter	Controls whether Features appear as a search criterion for a room.	YES/NO	Typically set to NO if no features have been defined on the rooms.
Create/Manage Reservations	Show Floor Filter	Controls whether Floors appear as a search criterion for a room.	YES/NO	Typically set to NO if all rooms in the template are on the same floor.
Create/Manage Reservations	Show PO Number on Reservation	If set to YES, the PO Number is displayed in the Reservation Details.	YES/NO	
Create/Manage Reservations	Show Room Pricing	If enabled, room pricing will be displayed per the selection in the Default Pricing Plan parameter.	YES/NO	
Create/Manage Reservations	Show Room Type Filter	Controls whether Room Types appear as a search criteria for a room.	YES/NO	Typically set to NO if all rooms in the template are the same room type.

AREA	Title	Description	Value	EXAMPLE
Create/Manage Reservations	Teardown Time in Minutes For All Rooms	If enabled, the default teardown time defined for a room is ignored and this parameter's value is used instead. The parameter Override Default Room Setup/Teardown Times must also be enabled. This parameter is usually configured for video conference (VC) reservations where setup/teardown times for participating rooms can differ.		If enabled, the default teardown time defined for a room is ignored and this parameter's value is used instead. The parameter Override Default Room Setup/Teardown Times must also be enabled. This parameter is usually configured for VC reservations where setup/teardown times for participating rooms can differ.
Create/Manage Reservations	Validation of Building Hours	Controls whether Building Hours are enforced based on the Booking's Event Time or Reserved Time (i.e., the setup and/or teardown time surrounding the booking).	Reserved Time or Event Time	Parameter is set to Reserved Time. Building hours are 9 am - 4 pm. Setup time configured on room X is set to 30 minutes. Everyday User will not be able to book room at 9 am because the setup time is 30 minutes before building is "open."
Create/Manage Reservations	Warn User if Room Selected is	If enabled, a user will be alerted by a pop	YES/NO	Typically set to YES.

AREA	Title	Description	Value	EXAMPLE
	Not Available for All Dates	up, if a selected room is not available for all requested dates.		

Email

AREA	Title	Description	Value	EXAMPLE
Email	Default Subject for Email	This entry appears in the Subject line of email the reservation summary email that is generated when an Everyday User submits a reservation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured. See Also: Configure Email Settings.		Request Summary, Event Summary, etc.
Email	Email Address of Sender	This entry indicates the "From" email address in the reservation summary email that is generated when an Everyday User submits a reservation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured.		
Email	Format for Request Summary	Specify a detailed or summarized report for the reservation summary email that is generated when an Everyday User submits a reservation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be	Detail Summary Mobile Friendly	

AREA	Title	Description	Value	EXAMPLE
		configured.		
Email	Name of Email Sender	Indicates the "From" name in the reservation summary email generated when an everyday user creates a reservation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured. Navigate to **Configuration** > **Everyday User Applications** > **Everyday User Process Templates** and highlight the template. Select Confirmation.		
Email	Send Confirmation on Cancel	Sends the reservation summary if the reservation or a booking is canceled.		
Email	Send Request Summary upon Submit	Determines whether reservation summary information is emailed to the Everyday Users when a reservation is submitted. A reservation summary email must be configured at the Everyday User Template/Confirmation level.	YES/NO	Typically set to YES.

Email - Settings

AREA	Title	Description	Value	EXAMPLE
Email - Settings	Account to Use for Sending Email	The email account against which outgoing email from EMS is authenticated. Only required if the SMTP mail		

AREA	Title	Description	Value	EXAMPLE
		server requires authentication.		
Email - Settings	Name or IP Address of SMTP Server	SMTP mail server used solely for emails related to everyday user application functionality. This mail server does not apply to emails generated within the EMS Desktop Client or by any email notification service.		
Email - Settings	Password of Email Account	The password for the email account. Only required if the SMTP mail server requires authentication.		
Email - Settings	SMTP Server Port	The default email port for your SMTP server.		

EMS for Outlook - Specific

AREA	Title	Description	Value	EXAMPLE
EMS for Outlook-Specific	Display Filters before showing Rooms	Whether to show filter options before listing room availability on EMS for Outlook.		
EMS for Outlook-Specific	Edit Text to display under icon in EMS for Outlook			
EMS for Outlook-Specific	Number of Available Rooms upon Search in Outlook			

AREA	Title	Description	Value	EXAMPLE
EMS for Outlook-Specific	Outlook Book Selected Bookings Color			
EMS for Outlook-Specific	Show Attendees in Book	Shows attendees availability as well as room availability in Grid view.	YES/NO	Typically set to YES.
EMS for Outlook-Specific	Text to append to EMS for Outlook meetings	Adds text to Outlook meetings when the meetings are created using the EMS for Outlook add-in. When configuring the parameter, the following apply: • You can enter plain text with a 50 character limit; HTML is not supported. The text you enter will be added to the meeting body. • If you leave the parameter's value field empty (Null), no text will be added to the meeting body.		

Floor Mapping

AREA	Title	Description	Value	EXAMPLE
Floor Mapping	Floor Plan Web Service URL	Used for the EMS Floor Plan module. URL address for the floor mapping web service.		https://localhost/room-diagramming/diagramWS.asmx?WSDL

General

AREA	Title	Description	Value	EXAMPLE
General	ICS File (Calendar Appointment) Status	If the user selects Add to Personal Calendar from their existing reservations, this parameter controls if the default calendar appointment status is Busy or Tentative.		
General	Location Format	Determines how location information is displayed in Browse Events. Options are Room Code, Room Description, Building Code - Room Code, Building Code - Room Description, Building Description - Room Code, Building Description - Room Description, Building Description.		
General	Max Length for Text Fields	Introduced in Fall 2017 to mitigate a security vulnerability where the EMS Web App previously accepted an unlimited character count into certain fields. This parameter applies to the following fields: • UDFs • Reservation Comments • Service Attendee Notes • Exchange Email Messages • Web Text	**IMPORTANT**: If utilizing Skype for Business integration, this parameter must be set to '0' (unlimited). If a limit is set here, the Skype for Business invitation will not contain all required information.	

AREA	Title	Description	Value	EXAMPLE
		Note: This parameter does not apply to the LDAP Configuration page.		

Home Page

AREA	Title	Description	Value	EXAMPLE
Home Page	Default Home Page (Authenticated)	Controls which home page tab appears to Everyday Users—*Site Home* (help text record for *Default.aspx)* or *My Home*). This parameter only applies to authenticated users.		
Home Page	Default Home Page (Unauthenticated)	Controls whether *Site Home* or *My Home* is the default tab when loading default.aspx. The default value of this parameter is Site Home. This parameter only applies to unauthenticated users.		
Home Page	Show Infographics on My Home	Controls whether the		

AREA	Title	Description	Value	EXAMPLE
		infographics about the Everyday Users' bookings appear on the My Home tab.		

Labels

AREA	Title	Description	Value	EXAMPLE
Labels	Event Title Plural	If updating this parameter, it is recommended that the parameter Event Type Singular is also updated.		See Event Title Singular.
Labels	Event Title Singular	If updating this parameter, it is recommended that the parameter Event Type Plural is also updated.		Appears on 3rd Screen of EMS Web App. Often titled "Event", "Meeting."

Mobile - Specific

AREA	Title	Description	Value	EXAMPLE
Mobile-Specific	Field to find rooms by when scanning QR codes	Indicates the fields you want to match rooms by Room ID, Room Code or External Reference.	Room ID, Room Code, External Reference (on room).	
Mobile-Specific	Label for the Help Link on the Mobile App	Login to the EMS Mobile App and click on top left navigation bar. On the bottom there is a help URL. This para-		Login to the EMS Mobile App and click on top left navigation bar. On the bottom there is a help URL.

AREA	Title	Description	Value	EXAMPLE
		meter allows you to configure the label for the help link. You can also configure the URL using another parameter - URL for HELP link on the EMS Mobile App.		
Mobile-Specific	Maximum EMS Mobile App version that the API should allow to connect.	Maximum app version that the API will allow to connect.		
Mobile-Specific	Minimum EMS Mobile App version that the API should allow to connect.	Minimum app version that the API will allow to connect.		
Mobile-Specific	Minimum number of minutes to book via QR code or mobile Browse Location			
Mobile-Specific	Mobile checkin proximity distance			
Mobile-Specific	Mobile proximity unit of measurement			
Mobile-Specific	Scans custom QR codes and	QR Codes when		

AREA	Title	Description	Value	EXAMPLE
	interprets them as URLs.	scanned, can be configured to be interpreted as a URL. If the Customer's configuration requires QR codes to be scanned as a URL, this parameter should be set to YES. If set to No, QR Codes will be scanned as plain text.		
Mobile-Specific	Sets the header variable for the EMS Mobile APIs Header Authentication Method	EMS Mobile App supports header authentication. The value of the header variable is set on the Platform's Admin page. The same value should also be set for this parameter to make the Header Authentication work.		See Also: Portal Authentication Methods.
Mobile-Specific	The Query String Field in QR Code URLs for looking up Rooms	If you have the parameter SCAN CUSTOM QR CODES and INTERPRETS THEM AS URLS set to YES, then this is what tells the app to look for in the Query string.		If set to ROOMID, when it goes to the following URL: http://blah.com?romID=23921, it would use that ROOMID to look up the room based on the parameter: FIELD TO FIND ROOMS BY WHEN SCANNING QR CODES.

AREA	Title	Description	Value	EXAMPLE
Mobile-Specific	The subject for the EMS Mobile two-factor setup email	Subject of the email sent to users notifying them to go to the EMS Web App and scan their 2fa barcode.		The first time you configure 2fa (Two-Factor Authentication) you get e-mailed. This is the subject of that e-mail.
Mobile-Specific	URL for the EMS Mobile App in the app store	Setting this parameter to blank prevents the EMS Mobile App popup prompt from appearing.		
Mobile-Specific	URL for the EMS Mobile App in the play store	Setting this parameter to blank prevents the EMS Mobile App popup prompt from appearing.		
Mobile-Specific	URL for the Help Link on the mobile app	Login to the EMS Mobile App and click on top left navigation bar. On the bottom there is a help URL. The URL you put here, will be the URL for the Help Link. You can also configure the Help Link Label using another parameter - URL for HELP link Label on the EMS Mobile App.		

My Events

AREA	Title	Description	Value	EXAMPLE
My Events	Allow Add Booking to Reservation	If enabled, users can add bookings to existing Reservations.	YES/NO	Typically set to YES.
My Events	Allow Edit UDFs on Reservation	If enabled, users can edit User Defined Field values for their existing Reservations.	YES/NO	Typically set to YES.
My Events	Allow Reservation Edits	If enabled, an Everyday User can edit reservation-level information on existing reservations, specifically, Event Name, Event Type, Group and Contact information, billing information, and a Comment (if one exists).	YES/NO	Typically set to YES.
My Events	My Events Default View	Controls the default view of the My Events page in the EMS Web App. You can set the My Events page's default view to either the **Reservations** tab or the **Bookings** tab. The default value for this parameter is Reservations.	Reservations/Bookings	Users who primarily manage Conference/Events would typically want the default view to be Reservations, and users who primarily manage Workspace/Self-Serve meetings would typically want the default view to be Bookings because viewing events by bookings reduces

AREA	Title	Description	Value	EXAMPLE
				the number of selections required to check-in.
My Events	Require Cancellation Reason	If enabled, users must provide a cancellation reason if they opt to cancel a booking. Cancel Reasons are configured within the EMS Desktop Client under **Configuration** > **Other** > **Cancel Reasons**, and a Cancel Reason must be enabled for the everyday user in order to appear as an option.	YES/NO	Typically set to NO.
My Events	Show Group Column on My Events	If enabled, the Group column appears when a user is viewing a list of their Reservations.	YES/NO	Typically set to YES.
My Events	Show Send Invitation Link		YES/NO	If set to NO, the Send Invitation option does not appear in Reservation Tasks on the View Reservation page in My Events. When enabled, the ics file is sent to the entered email address. If set to YES, the Send Invitation link is available in the

AREA	Title	Description	Value	EXAMPLE
				Reservation Tasks. on the View Reservation page in My Events.
My Events	Show Service Availability	Controls whether the View Service Availability option appears when managing an existing reservation. Service Availability includes cutoff times for services enabled for the everyday user as well as Building to which services are available.	YES/NO	From My Events, select the Event. Under Reservation Tasks, users can see View Service Availability.

Schedule View

AREA	Title	Description	Value	EXAMPLE
Schedule View	Display Setup/Teardown Times	If room has setup/teardown times they are always shown irrespective of this parameter. If disabled, then booking level setup/teardown time is not shown to the user.	YES/NO	
Schedule View	Event Information to Display in Booking on Schedule View	Determines what information should show in the free/busy bar in the Book. Options include: None, Event Name or Group Name.		

AREA	Title	Description	Value	EXAMPLE
Schedule View	Ignore Room Display to Everyday Users Flag	All bookings for all rooms are considered "Private" if this parameter is enabled.	YES/NO	If set to YES, the booking will display the label defined in PARAMETER: Label for Private Bookings on Schedule View.
Schedule View	Label for "Private" Bookings on Schedule View	The default label in Schedule View for events set to not display on the web (i.e., the bookings' Event Type and/or Status are not configured to display on the web).		"Private"
Schedule View	Sequence of Available Rooms upon Search	Option for how rooms are sorted when a user is viewing rooms in the schedule view. Choices are alphabetically by Room Description or numerically by Book Sequence values are configured on the Rooms.		
Schedule View	Start Time on Schedule View	Determines the start time for the grid. (Schedule View)		7 am

Services

AREA	Title	Description	Value	EXAMPLE
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.	YES/NO	Typically set to YES.
Services	Allow Edit of Ser-	If this option is set to YES,	YES/NO	Typically set to

AREA	Title	Description	Value	EXAMPLE
	vices	users can edit the services they have added to events.		YES.
Services	Populate Service Setup with Attendance	If enabled, the Estimated Count field for Catering-type Categories will be populated with the Attendance value.	YES/NO	
Services	Restrict Service Order Times Within Event Times	If enabled, users cannot specify Service Order Start or End times outside of the event's Start and End times.	YES/NO	
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.	YES/NO	

AREA	Title	Description	Value	EXAMPLE
		Note: This parameter is not enforced for EMS for Outlook. The service times will default to the event time when it is changed in EMS for Outlook.		
Services	Show Resource Pricing	If enabled, resource pricing will be displayed per the selection in the Default Pricing Plan parameter.	Yes/No	

Skype for Business

AREA	Title	Description	Value	EXAMPLE
Skype for Business	Azure Active Directory Client ID			

AREA	Title	Description	Value	EXAMPLE
Skype for Business	Azure Active Directly Tenant			
Skype for Business	Skype For Business AutoDiscover [sic] URL	See Also: AutoDiscover URL in the Configure Skype for Business topic.		
Skype for Business	Skype For Business Server Authentication Method			

System

AREA	Title	Description	Value	EXAMPLE
System	Platform Services API URL			

Unauthenticated Requests

AREA	Title	Description	Value	EXAMPLE
Unauthenticated Requests	Allow Unauthenticated Users to Create Requests	If enabled, unauthenticated users (i.e., guests) will have the option to request a room. The (unauthenticated user) Everyday User Process Template must also be configured in the EMS Desktop Client under **Configuration** > **Everyday User Applications** > **Everyday User Process Templates**.		
Unauthenticated	Allow Unau-	If enabled, an unau-		

AREA	Title	Description	Value	EXAMPLE
Requests	thenticated Users to Search for Room by Name	thenticated user can specify a room as part of their request.		
Unauthenticated Requests	Display Location Filters and Room Availability to Unauthenticated Users	If enabled, an unauthenticated user can search for rooms and see room availability.		

CHAPTER 150: EMS System Parameters

EMS Kiosk App

> **Note:**
> From the All Applications tab of the Parameters dialog, you can configure the following parameters for EMS Kiosk: **Everyday Users linked to Groups via External Reference**, **Building Title Plural**, **Building Title Singular**, **Group Title Plural**, **Group Title Singular**, **Room Title Plural**, and **Room Title Singular**.

Parameters for the EMS Kiosk App are broken into the following Areas:

- Floor Plans
- Hoteling
- Make Reservation
- Miscellaneous
- My Reservations
- Security
- Today's Events

Floor Plans

Area	Title	Description	VALUE
Floor Plans	Floor Plan Web Service URL	The full URL for the web service used by the optional Floor Plan Configuration module. **See also:** Configuring Floor Plans.	
Floor Plans	Show Availability Indicators on Locate Space	When set to YES, availability indicators will show on floor plan images in EMS Kiosk.	YES/NO
Floor Plans	Show Floor Plan Module in Kiosk	If enabled, the optional Floor Plan module can be displayed in EMS Kiosk.	YES/NO

Hoteling

Area	Title	Description	VALUE
Hoteling	Allow Check In From Kiosk	If set to YES, allows a user to check in to a workspace from EMS Workplace.	YES/NO
Hoteling	Enable Group Type Filtering on Make Reservation	If set to YES, enables feature filtering and/or room type filtering by group type on the Make a Reservation page.	YES/NO
Hoteling	Group Type Filtering Space Label on Make Reservation	The label used if group type filtering is enabled.	

Make Reservation

Area	Title	Description	VALUE
Make Reservation	Booking Duration Set By Specific End Time Or Number Of Hours	Whether to set meeting end time by number of hours or specific end time. Defaults to "Specific End Time." "Number of Hours" uses the value from the "Default End Time for New Reservation" parameter (the start time + the Number of Hours value, rounded to the nearest 0, 15, 30, 45).	Specific End Time Number of Hours
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	

Area	Title	Description	VALUE
		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.	YES/NO
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 drop-down lists are displayed on the Make Reservation page. If set to NO, the default start and end times are used for bookings.	YES/NO
Make Reservation	Enable Everyday User Process Template Security	If set to YES, the user's web process templates in addi-	YES/NO

Area	Title	Description	VALUE
		tion 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 days forward from today to allow a start date	The number of days in the future that bookings can be made.	
Make Reservation	Number of Future Concurrent Days Allowed for New Reservation	The number of days in the future that bookings can be made.	
Make Reservation	Number Of Hours For Booking	The default number of hours to use when setting the Booking Duration", values from 0.5 to 12.	
Make Reservation	Reservation Source for New Reservation	The reservation source that is applied to reservations created 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 drop-down menus.	5 minutes 15 minutes 30 minutes 60 minutes

Miscellaneous

Area	Title	Description	VALUE
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	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.	YES/NO
Miscellaneous	Enable Stand-by Mode on Timeout	If set to YES, then EMS Kiosk goes into Standby-by Mode (a Stand By button is displayed) after timing out.	YES/NO
Miscellaneous	Location Format	Select from Building Code, Room or Room Description or Building Description, Room or Room Description.	
Miscellaneous	Max Booking/Availability Records Returned	The maximum number of rooms that are displayed when making a reservation.	
Miscellaneous	Max Records Returned for Group Searches	The maximum number of records returned when searching for a group.	
Miscellaneous	Page Timeout (seconds)	The period of inactivity in EMS Kiosk, after	

Area	Title	Description	VALUE
		which the default page is displayed.	

My Reservations

Area	Title	Description	VALUE
My Reservations	Allow User to Cancel Booking	If set to YES, then users can cancel bookings from the Reservations page.	YES/NO
My Reservations	Allow User to Cancel/End Booking outside of Kiosk Profile	If enabled, users can cancel or end a booking outside of using their EMS Kiosk profiles.	YES/NO
My Reservations	Allow User to End Booking	If set to YES, then users can end their bookings from the My Reservations page.	YES/NO
My Reservations	Cancel Status	The status that is applied to canceled bookings.	
My Reservations	Cancellation Cutoff (minutes)		
My Reservations	Number of days in the future you can cancel a booking		

Security

Area	Title	Description	VALUE
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.	External Reference Badge Number Personnel Number Network ID Email Address
Security	Primary User Authentication Type	The options are as follows: • **Badge:** Exact match of badge ID values. Values can be nvarchar up to 150 characters. • **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.	Badge Standard Exact Match LDAP
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	

Area	Title	Description	VALUE
		needed.	
Security	Require Timeout/Logoff to Terminate User Session	The default is **Yes**. If set to **Yes**, a user session is terminated when the user logs off or when the session times out. The length of timeout is set using the Page Timeout (seconds) parameter. If set to **No**, a user session is ended when the user returns to Main Menu.	YES/NO
Security	Secondary User Authentication Type (Only used if "Badge" is primary security)	(Used only if "Badge" is primary security). Alternate authentication method that is used when a user doesn't have his/her badge.	Exact Match LDAP Standard
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.	YES/NO
Security	Use 10-Key Keyboard for Authentication	Uses a numeric 10-key numeric keyboard instead of the full keyboard.	YES/NO

Today's Events

Area	Title	Description	VALUE
Today's Events	Default Sort Column	If set to YES, sets Today's Events to sort (in Ascending/Descending order) by Start Time, End Time, Event Name, Employee Name, Location, and Has Map. Defaults	

Area	Title	Description	VALUE
		to NO.	
Today's Events	Display Building Drop Down	If set to YES, users can filter by building on the Today's Events page.	YES/NO
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.	YES/NO
Today's Events	Display Floor Drop Down	If set to YES, users can filter by floor on the Today's Events page.	YES/NO
Today's Events	Display Room Type Drop Down	If set to YES, users can filter by room type on the Today's Events page.	YES/NO
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.	YES/NO

CHAPTER 151: Import Files to Streamline Data Entry

You can streamline data entry by 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 section details the import file specifications for each of these data items.

> **Note:**
> If your organization has licensed the optional EMS module, EMS Human Resources Toolkit, refer to the HR Toolkit Installation Guide.

If you are importing data to your EMS database using a spreadsheet, due to the extraneous formatting hidden in Microsoft® Excel, the best practice is:

1. Build your spreadsheet.
2. Copy and paste it into Notepad.
3. Import it from the Notepad file.

How Do I Import Data?

For instructions in importing data, follow the links in the table below:

Type of Import	Importing Instructions	FILE SPECIFICATIONS
Reservations	Import Reservation Utility	Reservation Import File Specifications
Special Dates (Holidays)	Import a List of Special Dates	Special Date Import File Specification
Resources	Importing Resources for a Category	Resources Import File Specifications
Groups (People)	Import Groups	Group Import File Specifications
Rooms	Import Rooms	Room Import File Specifications
(EMS Campus) Final Exam Schedules	Importing Final Exam Schedule Templates	Final Exam Schedule File Specifications

Note:

Your organization might also be licensed for the Academic Import Utility, which enables you to import lists of reservations for academic or Campus implementations.

CHAPTER 152: Special Date Import File Specification

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Date	1	10	Date	mm/dd/yyyy	Required	01/23/2019
Description	2	30	Alphanumeric	Left Justified	Required	Thanksgiving Day
Notes	3	7000	Alphanumeric	Left Justified	Optional	Staff Holiday – No Events Allowed

CHAPTER 153: 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

CHAPTER 154: 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	(##.##)	Required	10.00
Available On Web	5	5	Alphanumeric	True or False	Required	True
Express Checkout	6	5	Alphanumeric	True or False	Required	False
Serves	7	2 decimal places	Decimal	(##.##)	Required	10.00
Min. Quantity	8	2 decimal places	Decimal	(##.##)	Required	05.00

CHAPTER 155: 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

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Phone 2	10	30	Alphanumeric	Left Justified	Optional	303-740-4429
Billing Reference	11	50	Alphanumeric	Left Justified	Optional	10-24670

CHAPTER 156: Reservation Import File Specifications

Field	Field Sequence	Max Width	Data Type	Format	Optional or Required	Example
Date	1	10	Date	mm/dd/yyyy	Required	03/15/2018
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 Brady
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
Billing Reference	11	100	Alphanumeric	Left justified	Optional	Training for new system deployment

CHAPTER 157: Course Schedule Import File Specifications

Column	Type	Required Unique	Max Chars.
Sunday	True/False	Yes	
Monday	True/False	Yes	
Tuesday	True/False	Yes	
Wednesday	True/False	Yes	
Thursday	True/False	Yes Sequence	
Friday	True/False	Yes	
Saturday	True/False	Yes	
Start Time	Text (HHMM)	Yes	4
End Time	Text (HHMM)	Yes	4
Final Exam Day Of Week	Text (UMTWRFS)	Yes	
Final Exam Start Time	Text (HHMM)	Yes	4
Final Exam End Time	Text (HHMM)	Yes	4

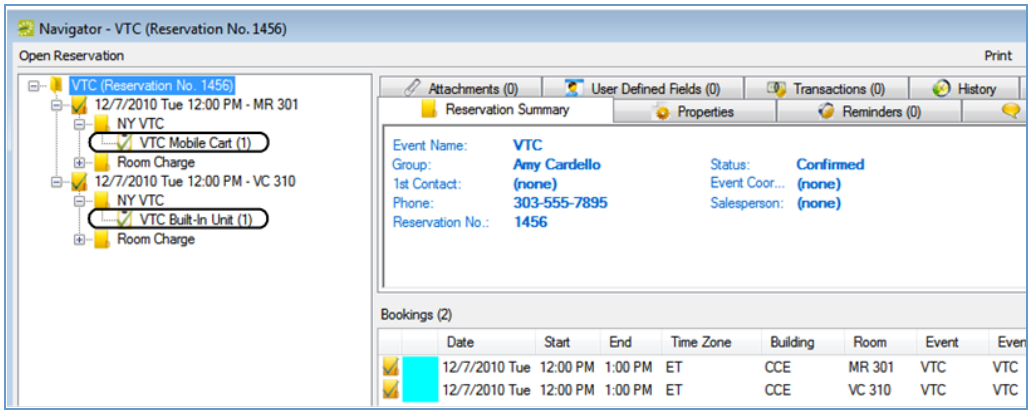
CHAPTER 158: Video Conferencing

This section details the configuration of the necessary features, resources, rooms, and everyday user process templates to accommodate reservations or room requests that require video conferencing capability.

See Also: Configure Video Conferencing Capabilities

Overview of Video Conferencing Configuration

For organizations that use video conferencing, additional configuration features are available to simplify the video conference reservation process, which typically uses a request or approval for room request process. When configured properly, EMS searches for all rooms that have a built-in video conferencing feature and it searches for all rooms defined in the system to accommodate a video conference. Shown below is a reservation with a mobile video conferencing cart automatically added to bookings.



Reservation with Video Conferencing Features Automatically Added to Bookings

You must configure the following types of rooms so the correct rooms and equipment display when users request video conferences in the Reservation Wizard (or the EMS Web App).

- **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 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 can enter a location. After the reservation is submitted, a booking detail for a mobile video conferencing cart is automatically added to the booking.

CHAPTER 159: Configure Video Conference Capabilities

To configure video conferencing capabilities (so that Everyday Users can book video conference meetings in EMS Web App or EMS for Outlook), you will:

- Configure Video Conference Room Features
- Configure Video Conference Services (Categories and Resources)
- Configure Rooms with Video Conference Equipment
- Configure Override Rooms
- Configure Event Types
- Configure a Video Conference Booking Template
- Configure Notifications and Reports

Configuring Video Conference Room Features

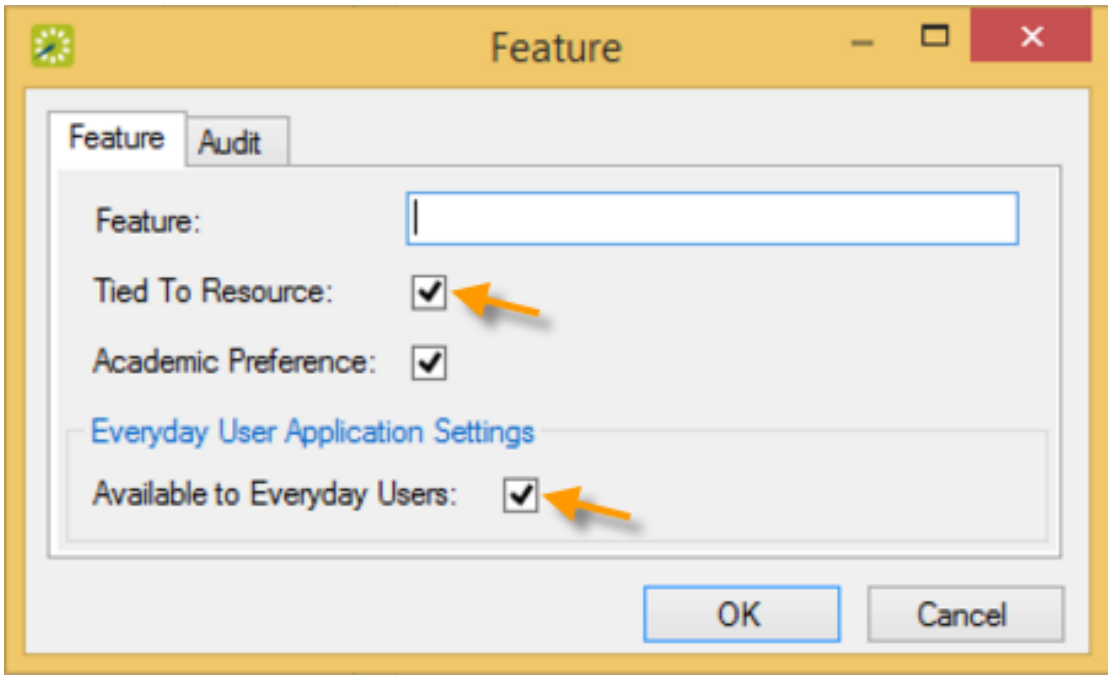
A feature is a built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. Your users can use features as criteria when they are searching for a room. They can also filter the available rooms that can be reserved for an event by room features. After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

1. Configure Room Features in EMS Desktop Client to reflect your video conferencing equipment options, such as a projector or a webcam. For detailed instructions, see Configure Features.



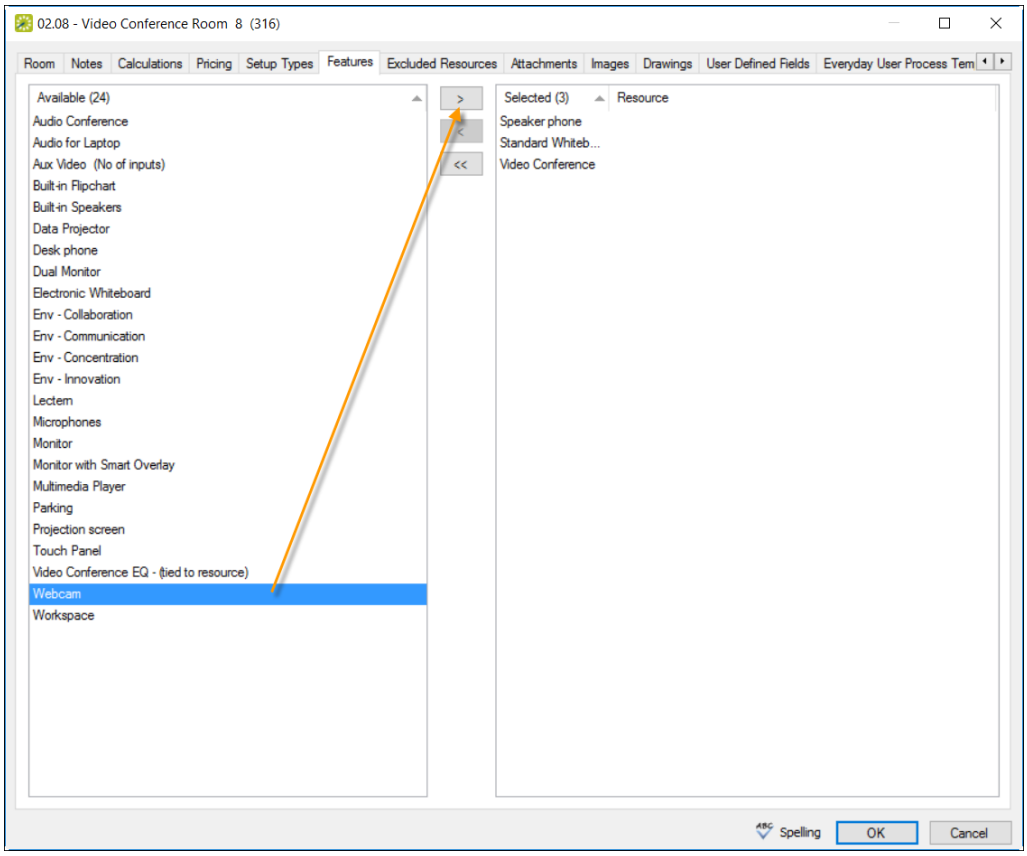
Note:

Be sure to select **Tied to Resource** when configuring a video conference Feature. This links the room to video conferencing equipment and services and streamlines the booking process. If you want EMS Web App users to see this feature when they are searching for available space, leave Available to Everyday Users selected.



2. Associate the feature(s) with Rooms (on the Features tab for Room Configuration); move the feature from the Available panel to the Selected panel as shown below. For detailed instructions, see Configuring Rooms.

Note:
Do not select the **Maintain Inventory** option when you are configuring this resource.



Configure Video Conference Services (Categories and Resources)

Configure several service categories to represent additional services to be performed for the video conference, such as A/V Setup, and a Mobile Video Conference Cart.

1. Configure a category for video conferencing services. Click here for detailed instructions on Configuring Categories.
2. Configure resources and services within the Category for equipment, setup, tear down, etc. For detailed instructions, see Configure Resources for a Category. Depending on your organization, you might need to configure two types of video conferencing resources for the category that you just created:
    - Built-in video conferencing equipment, such as a Built-in Video Conference Equipment.

      Note:
      Do not select the Maintain Inventory option

    - A Mobile Video Conferencing Cart.

Note:

Be sure to select the Maintain Inventory option , plus a value in the Quantity Available field

Note:

You can use the Room Configuration Wizard to mass-assign a feature to multiple rooms in a single step. Additionally, you can set the Status for these services to Request if your organization requires approvals.

For detailed instructions, see Room Administration Wizard.

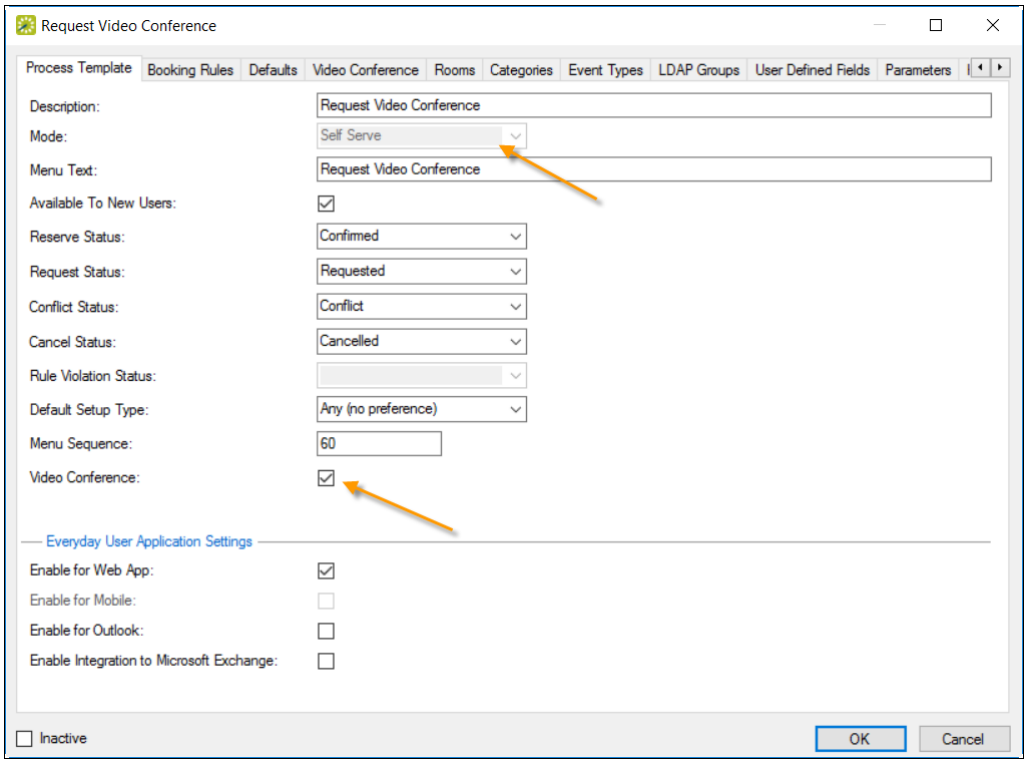
Configure a Video Conference Booking Template

For detailed instructions, see Configuring an Everyday User Process Template and use the example below.

Note:

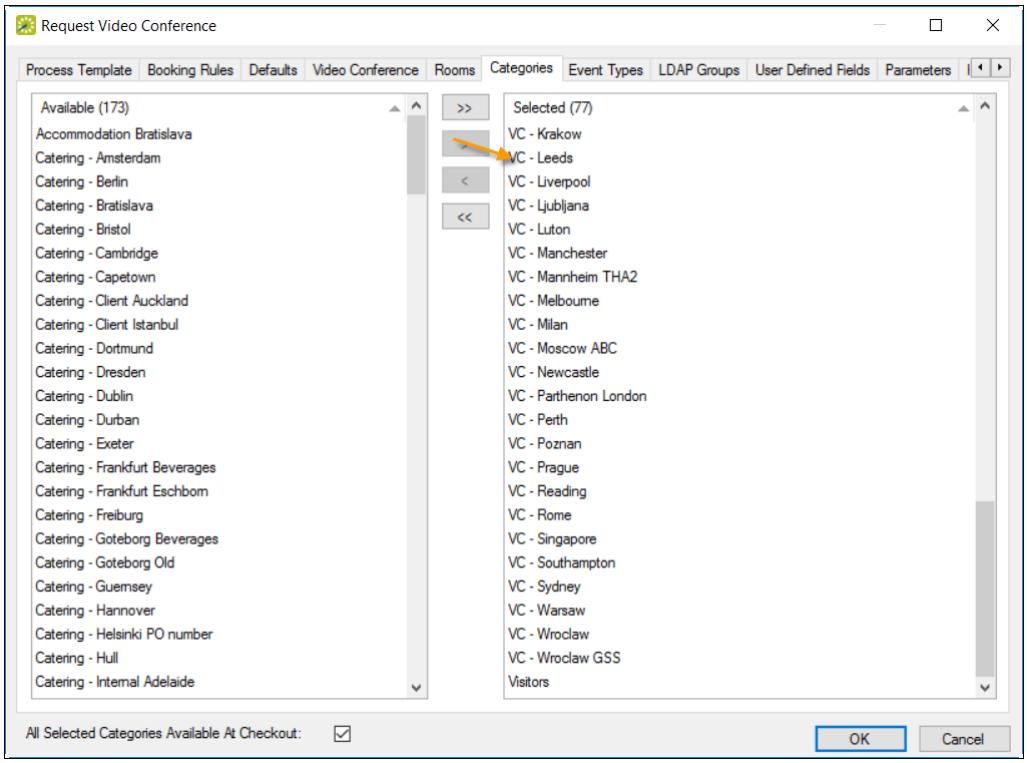
Video conferences are typically reserved in EMS Web App due to its streamlined permissions management and ease of use (especially the Calendar view). If you have a significant number of users who book video conferences in EMS Desktop Client, especially if they have limited access and might be uncomfortable using the more expert users' booking process, you might want to create a video conference template for the Reservation Wizard. Familiarize yourself with the process here and then for detailed instructions, see Configure Reservation Wizard templates.

1. Set the Mode to Self Serve and ensure the Video Conference option is selected for the template. If your organization requires such meetings to be approved, use Requested Request Status.



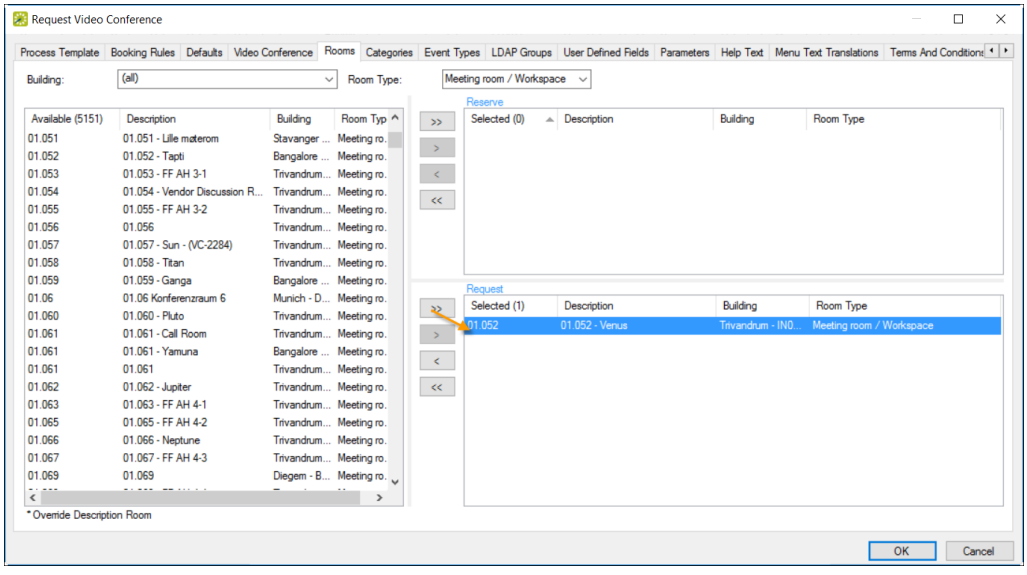
Request Video Conference Dialog Box

2. Move Categories (Resources and Services) for setup, teardown, equipment, and so forth, as you defined above, into the Selected panel on the Categories tab. Below is an example showing all "VC" (video conference) service categories for an organization enabled for users to select when booking with this template.



Categories Tab of the Request Video Conference Page

3. Move Rooms (which you defined above) on the Rooms tab to the Selected panel. If your organization requires video conference-equipped rooms to go through an approval process, use the Request panel on the lower right.

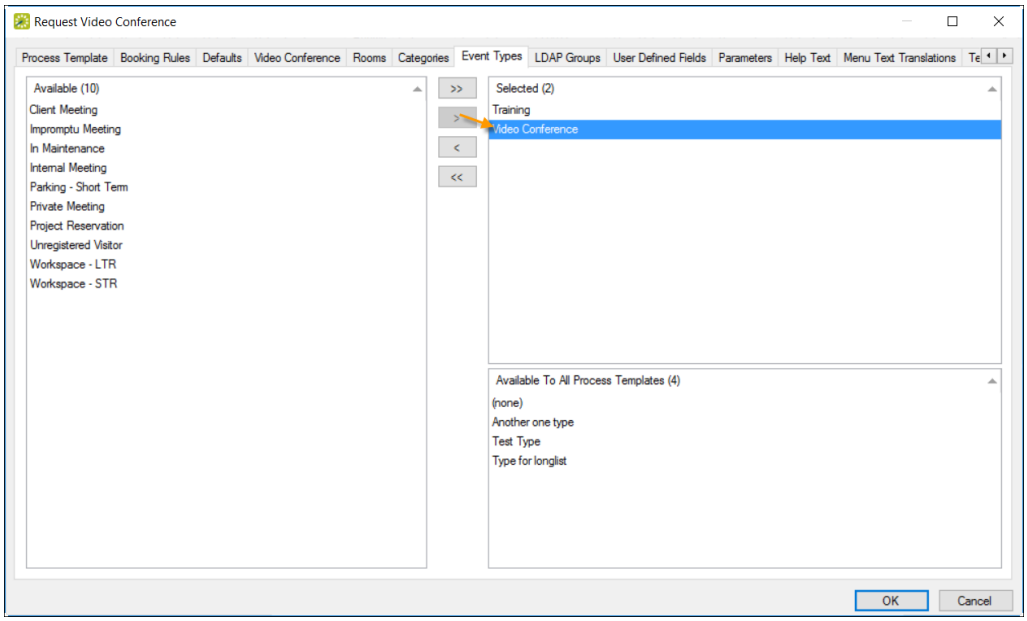


Rooms Tab of the Request Video Conference Page

Concept: Override Rooms Can "Override" Normal Room Configuration and Setup/Teardown Times

Users will be able to change configuration and start and end time defaults that would normally come from the room definition, in order to accommodate extra video conferencing equipment and services.

4. Move Event Types (which you defined above) on the Event Types tab to the Selected panel.



Event Types Tab of the Request Video Conference Page

5. On the Video Conference tab, select the video conferencing feature you defined in Step 1 (above).
6. Complete fields on the remaining tabs as needed and click OK to save.

Configure Notifications and Reports

To set how and when users are notified about the meeting and any changes to it (particularly as equipment and service requests move through the approval process), Configure Notification Rules.

Note:
Notification Rules are highly recommended if you integrate with CISCO TMS.

The most common report run on video conferences is the Setup Worksheet report, set to automatically run daily or weekly, and to deliver to stakeholders' inboxes. For detailed instructions, see EMS Setup Worksheet.

CHAPTER 160: 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. In addition, prior to using the AIU, you should have certain items configured in your EMS database.

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 session.

Important!

Creating reservations can take an extended time and must be performed when no users are logged on to EMS. (To log off active users, see Viewing and Emailing Logged-In Users.) 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.

Note:

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 Also: EMS System Parameters for All Applications.

Field	Field Sequence	Max Width	Type	Format	Example
Department	1	10	Alpha numeric	Left Justified	ACCT

Field	Field Sequence	Max Width	Type	Format	Example
Course	2	10	Alpha numeric	Left Justified	101
Section	3	10	Alpha numeric	Left Justified	1
CourseTitle	4	50	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
EndTime	10	4	Numeric	Zero Filled (Numerics only)	1450
StartDate (Optional)	11	10	Date	Formatted (mm/dd/yyyy)	8/30/2018
EndDate (Optional)	12	10	Date	Formatted (mm/dd/yyyy)	12/17/2018
Attendance (Optional)	13	5	Numeric	Zero Filled (Numerics only)	35

Fixed Width Format

Note:
All fields are required unless noted otherwise.

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	81	50	Alpha numeric	Left Justified, Trailing Spaces	Bob Smith
Days	131	7	Alpha numeric	Left Justified, Trailing Spaces	Parameter driven. Positional or specific text. e.g. “M W F” for Positional, Monday First
Building	138	10	Alpha numeric	Left Justified, Trailing Spaces	AC
Room	148	20	Alpha numeric	Left Justified, Trailing Spaces	101
BegTime	168	4	Numeric	Right Justified, Zero Filled (numerics only)	0800
EndTime	172	4	Numeric	Right Justified, Zero Filled (numerics only)	1450
StartDate	176	10	Date	Formatted	08/30/2018

Field	Column	Width	Field Type	Format	Example
(Optional)				(mm/dd/yyyy)	
EndDate (Optional)	186	10	Date	Formatted (mm/dd/yyyy)	12/17/2018
Attendance (Optional)	196	5	Numeric	Right Justified, Zero Filled (numerics only)	00035

Configured Items for the AIU

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."
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.

Note:
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.) 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.

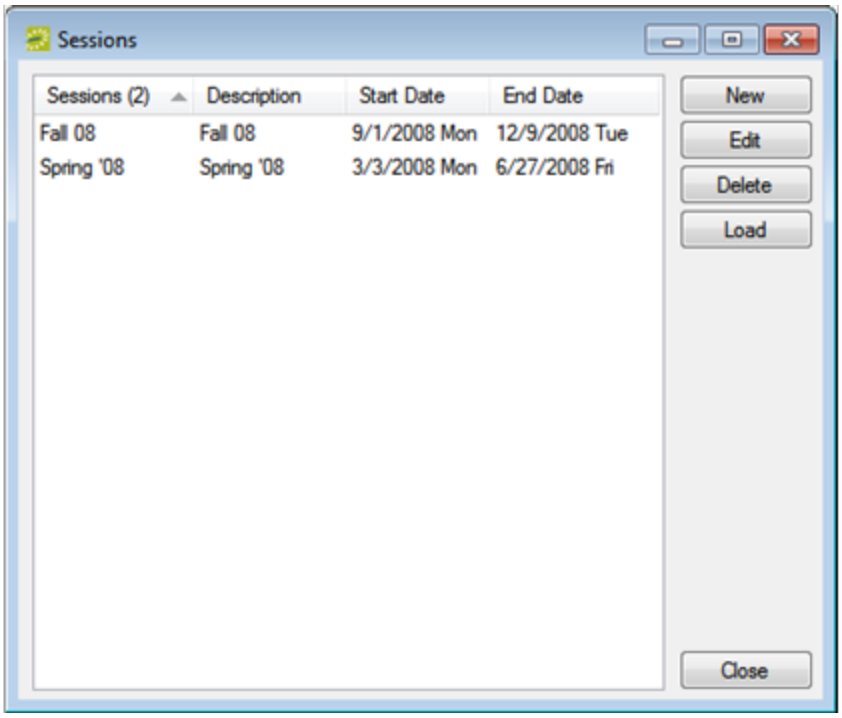
Reservations that were added to the EMS database using the AIU can be removed from the database using the AIU as well. Deleting a session removes all reservations created using the session.

Note:
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 Also: EMS System Parameters for All Applications.

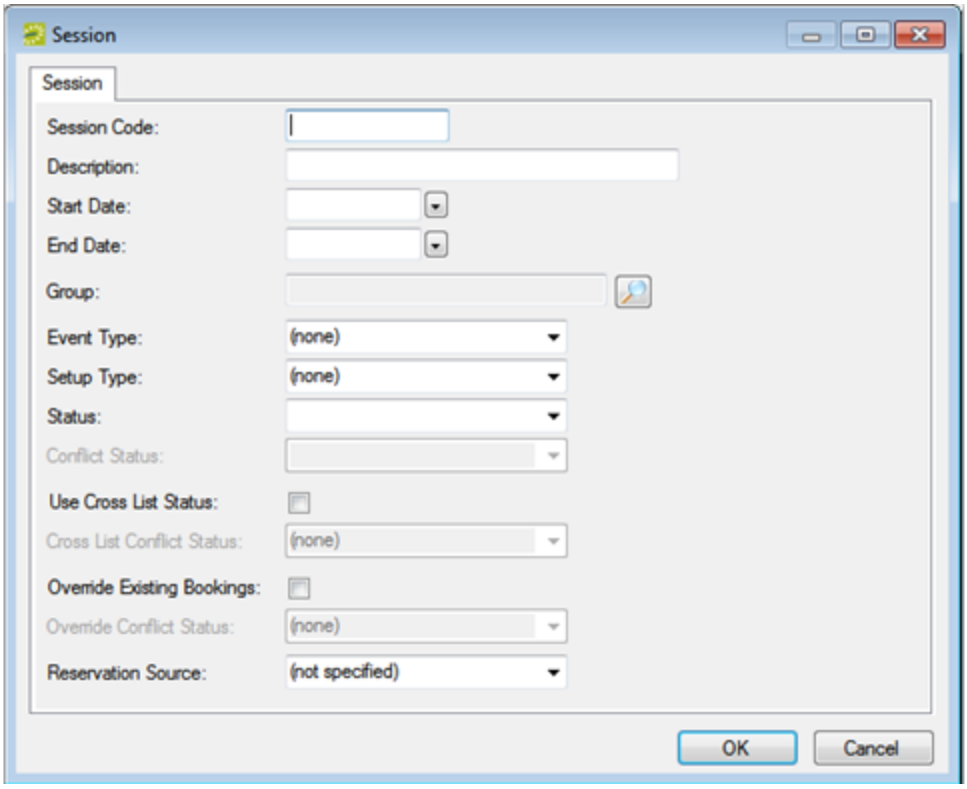
Configure an AIU session

Note:
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 Import the data into the session.

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.



2. Click New. The Session dialog box opens.



3. Enter the information for the new AIU session.

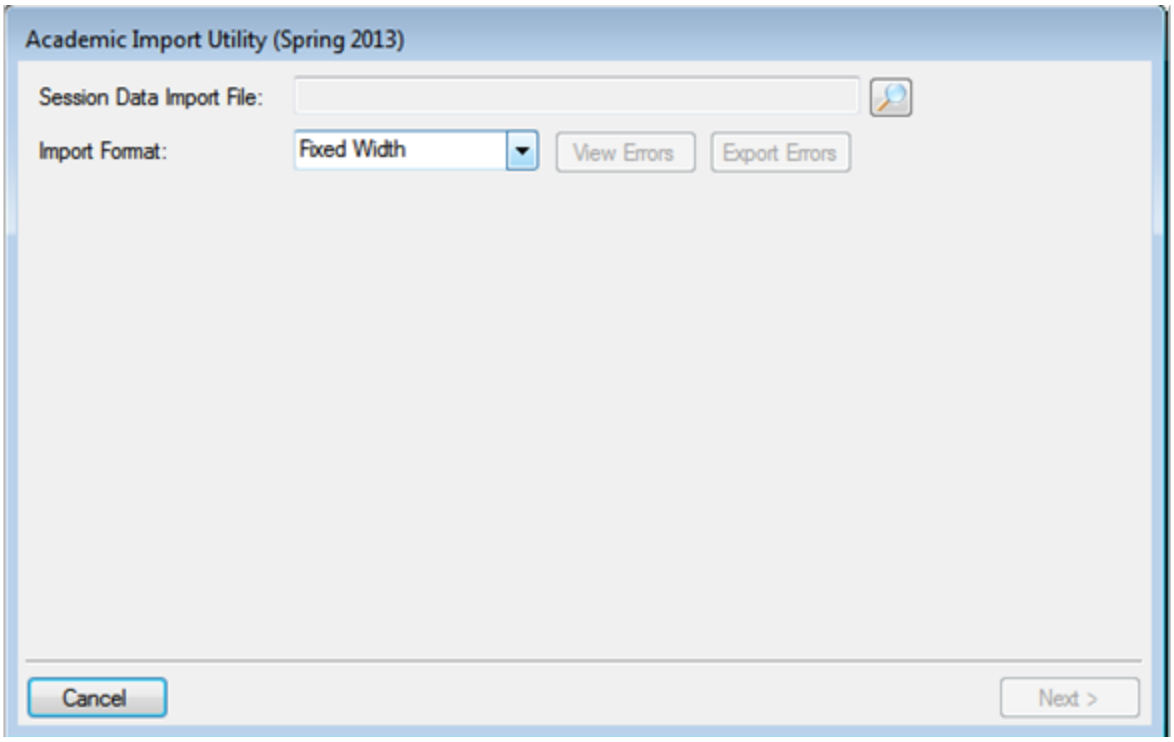
Field	Description
Session Code	A unique identifier for the session, for example, SPRING18.
Description	An expanded definition of the session code, for example, Spring Semester 2018. **Note:** The description can be a maximum of 50 characters, including spaces.
Start Date End Date	The start date and end date for the session (e.g., 1/15/18 and 5/31/18).
Group	The reservation holder for all reservations in the session. For example, Registrar's Office. You can select a value from the Group drop-down list, or you can click the Search icon to open the Groups window and create the necessary group. See Also: Configuring Groups.
Event Type	Select a value from the drop-down 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 Also: Configuring Event Types.
Setup Type	Select a value from the drop-down 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 Also: Configuring Setup Types.
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 Also: Configuring Statuses.
Conflict Status	Available after you specify a Status. Select a value from the drop-down 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 Also: Configuring Statuses.

Field	Description
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 drop-down 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 Also: Configuring Statuses.
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 drop-down 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 Also: Configuring Statuses.
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 Also: Configuring Reservation Sources.

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 import the data into the session below.

Import the Data into the Session

1. Select the session that you are using for importing classes, and then click Load. The first of three AIU windows opens.

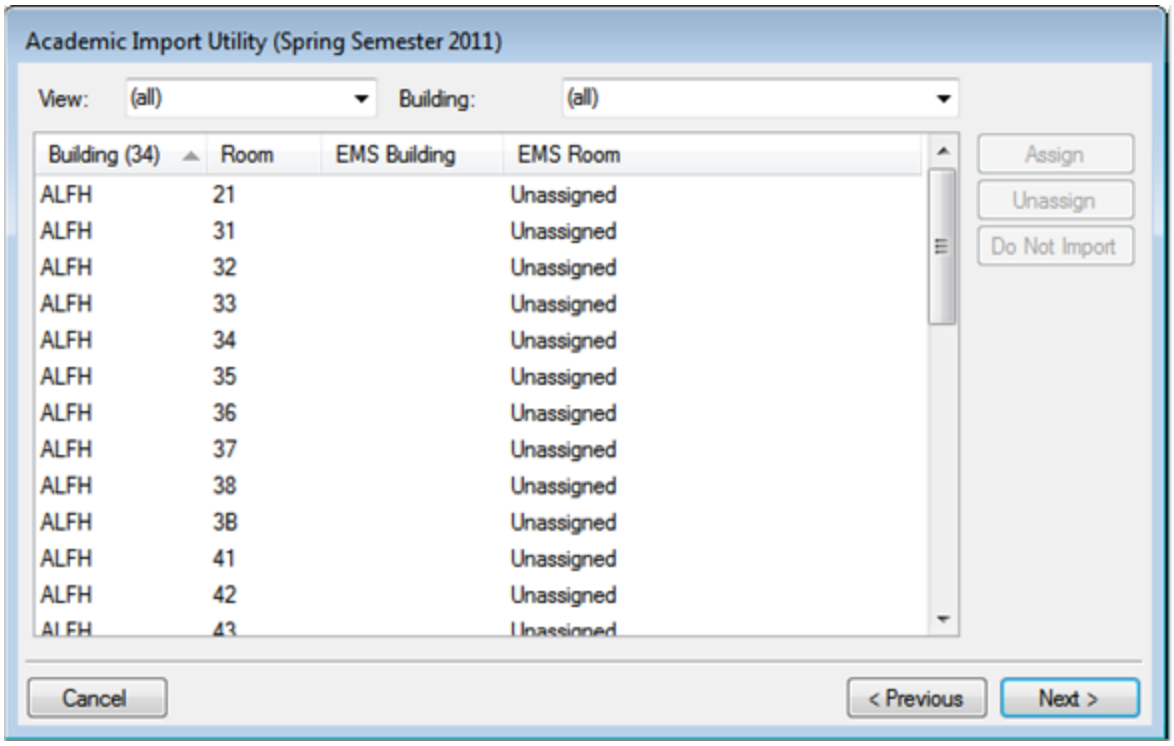


2. Click the Search icon to browse to and select the file that you are importing.
3. On the Import Format drop-down list, select the format for the file (Fixed Width or Tab Delimited).
4. Click Next. Two results are possible:
   - If any of the records in the import file have any issues (missing data, 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.

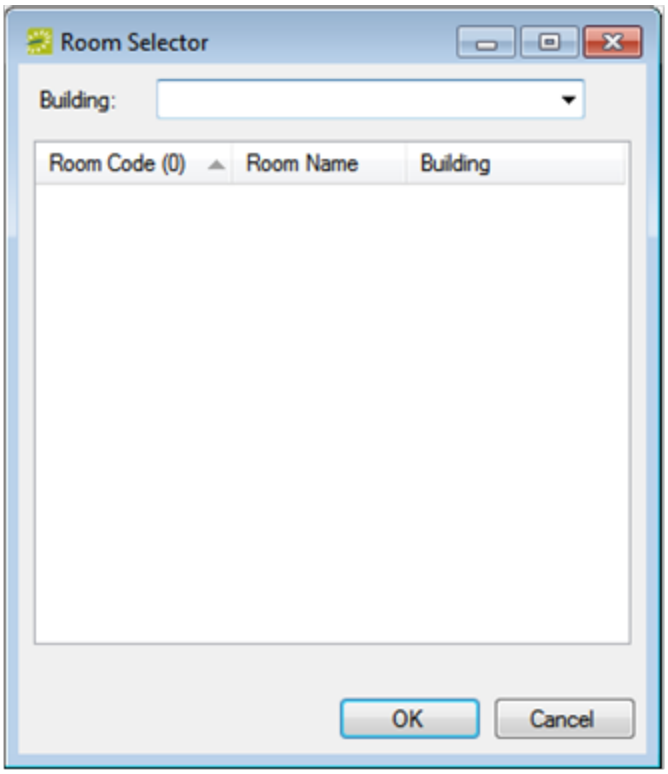
> **Note:**
> Optionally, you can also do one or both of the following:
>
> - You can click View Errors for more information.
> - You can click Export Errors to export the errors in the import file and an XML format.

5. 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

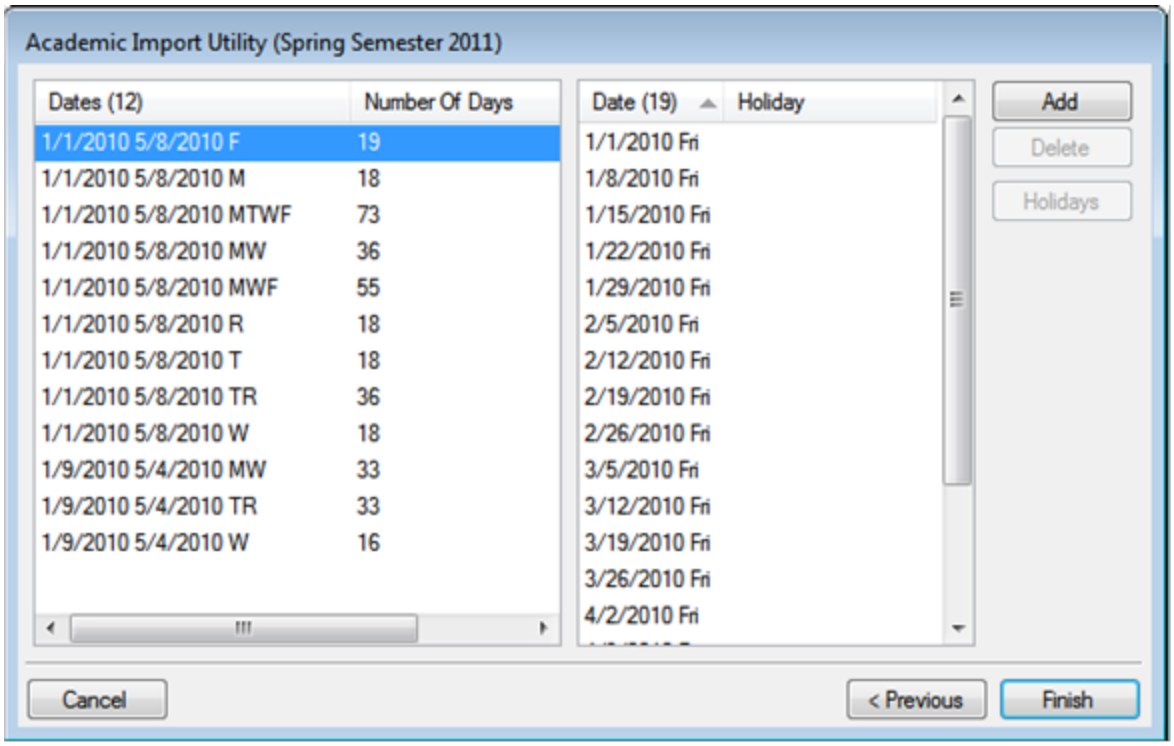
room in EMS.



6. 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.)
7. Select an unassigned class, or CTRL-click to select the multiple unassigned classes, and then click Assign. The Room Selector dialog box opens.



8. On the Building drop-down list, select the building or view by which to filter the available rooms list.
9. 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.
10. 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.



11. 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.
12. After you have added or deleted the necessary booking dates, click Finish. A message appears indicating that the session was successfully imported.
13. Click OK to close the message and return to the Sessions window.

CHAPTER 161: EMS Desktop Client Deployment Options

This guide will walk you through the different options for deploying the EMS Desktop Client.

There are two different deployment options for the EMS Desktop Client:

1. Web Deployment
2. Conventional Deployment

See Also:

- Decision Guide: Web Vs Conventional Deployment
- Webinar

CHAPTER 162: Decision Guide: Web Vs Conventional Deployment

What are My Deployment Options?

There are two different deployment options for the EMS Desktop Client:

1. Web Deployment
2. Conventional Deployment

EMS Desktop Web Deployment

EMS Desktop Web Deployment (V44+ and V44.1) is an alternative method for installing EMS Desktop Client locally on individual user machines. This solution is not a replacement for the EMS Web Client (discontinued after V43), but rather, it is an alternative to using Microsoft® methods of deployment, such as SCCM. Administrators can use it to host EMS Desktop Client on a web server, with the ability to push the URL to any EMS Administrators so they can download EMS Desktop Client without needing Administrative Privileges on their local machine.

The web deploy application is installed on your web server. The EMS Desktop Application is included within this installation. Once installed, end users point their web browsers to the EMS Web Deployment Application, which points them with a link to download the EMS Desktop Client. (See Also: Configure Users.) Once a user downloads and runs that link, the EMS Desktop Client is installed in the user's profile on that workstation. Once installed, the EMS Desktop Client will check the server for an updated version of the client each time the client is launched. If a new version is available, then it will automatically download and install the update.

Conventional Deployment

Conventional Deployment works like previous releases of EMS. The downloadable installer is in the form of a MSI file. Once the software is installed on the Admin Users workstation, it connects directly to the database. optionally it can be configured to connect to the Desktop Client API included in the Web Deployment option.

> **Note:**
> The Web Deployment method also adds an application layer (in the form of a web service), to the architecture of the application. Instead of the Desktop Client connecting directly to the Database server as it has in the past. All connections are routed through the Desktop Client API (Included with Web Deploy). this can add additional benefit for Security Considerations, or multi-region deployments. For further information on this feature is detailed here.

Features of Each Deployment Method

The table below outlines the features available between the two deployment methods.

Feature	Desktop Web Deployment	Conventional Deployment
Admin Rights required on the workstation	No	Yes
Number of installations per workstation	1 Per User	Once for all users of the workstation
Installation Location	Users Profile	Location can be specified during installation
Requires a Web Server	Yes	No
Can adopt customer specific, deployment procedures	No	Yes (Requires IT Assistance)
Able To deploy without user intervention	No	Yes (Requires IT Assistance)
Updates are handled...	From the Web Service on the server	Must be re-pushed to individual workstations.
IT has control of when updates are pushed	Yes	Yes
Network Connection to the database	Desktop Client API	Direct TCP connection or Desktop Client API

Note:

To enable SSL, you first make changes to the EMS Desktop Client .msi file. See Also: Enabling SSL.

CHAPTER 163: Web Deployment

EMS Desktop Web Deployment is a new option to Server Version 44 (Released January 2016). This feature allows for easy deployment of the desktop to your end users. It also incorporates a central source for posting application updates. These updates are applied to your end users' computers automatically once deployed to the server.

This topic provides information on the following

- How Web Deployment Works
- Networking Components
- Optional Connections
- Architecture Diagram

EMS Desktop Web Deployment (V44+ and V44.1) is an alternative method for installing EMS Desktop Client locally on individual user machines. This solution is not a replacement for the EMS Web Client (discontinued after V43), but rather, it is an alternative to using Microsoft® methods of deployment, such as SCCM. Administrators can use it to host EMS Desktop Client on a web server, with the ability to push the URL to any EMS Administrators so they can download EMS Desktop Client without needing Administrative Privileges on their local machine.

How Web Deployment Works

The web deploy application is installed on your web server. The EMS Desktop Application is included within this installation. Once installed, the end users point their web browsers to the web deploy application, which links them to download the EMS Client. Once the user downloads and runs that link, the Desktop Client is installed within the user's profile on that workstation. Once installed, the EMS Desktop Client Application will check the server for a updated version each time the client is launched. If a new version is available, then it will automatically download and install the update.

Networking Components

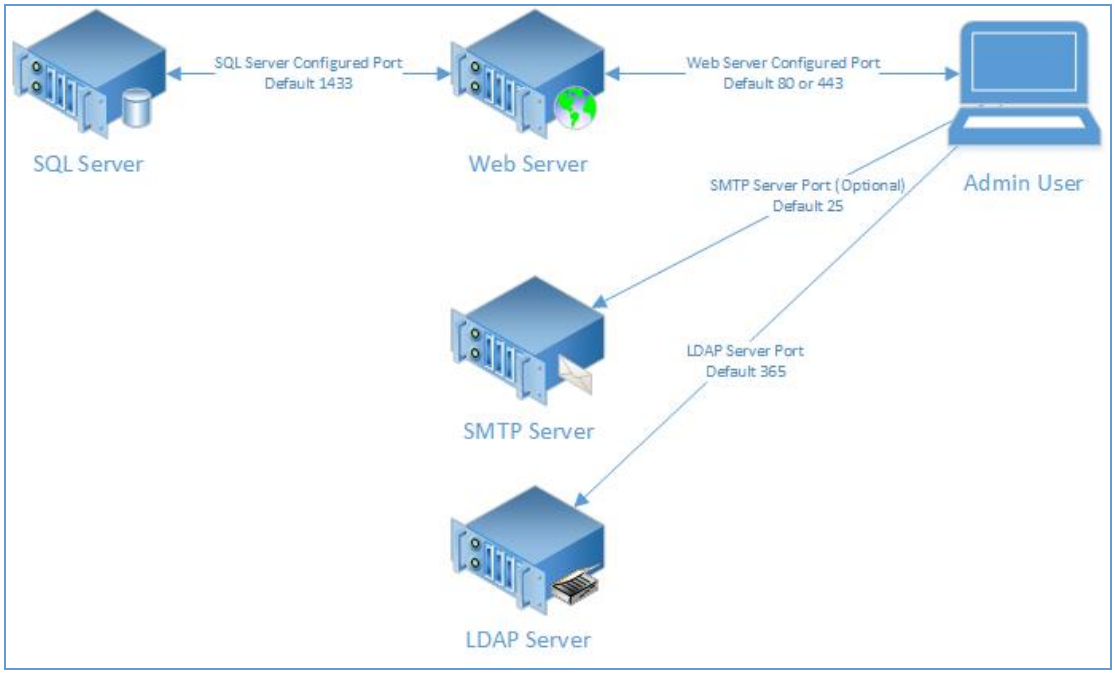
- The Web Server can be accessed by IP Address or Hostname. Port configuration is managed within IIS.
- If HTTPS is leveraged you will need to have a Certificate assigned to the binding within IIS. This certification must be trusted by the workstations that will be running the desktop client.
- The Web Server hosting the Web Deploy Application will need to have access to the Database server. The administrative users who will be leveraging the desktop client will need access to the Web Server.

Optional Connections

The Desktop client can connect to these services:

- SMTP Server
- LDAP Server
- Global Address Book Searches
- Admin User Authentication
- Web Process Template Configuration (Assigning LDAP Groups to Web Process Templates)

Architecture Diagram

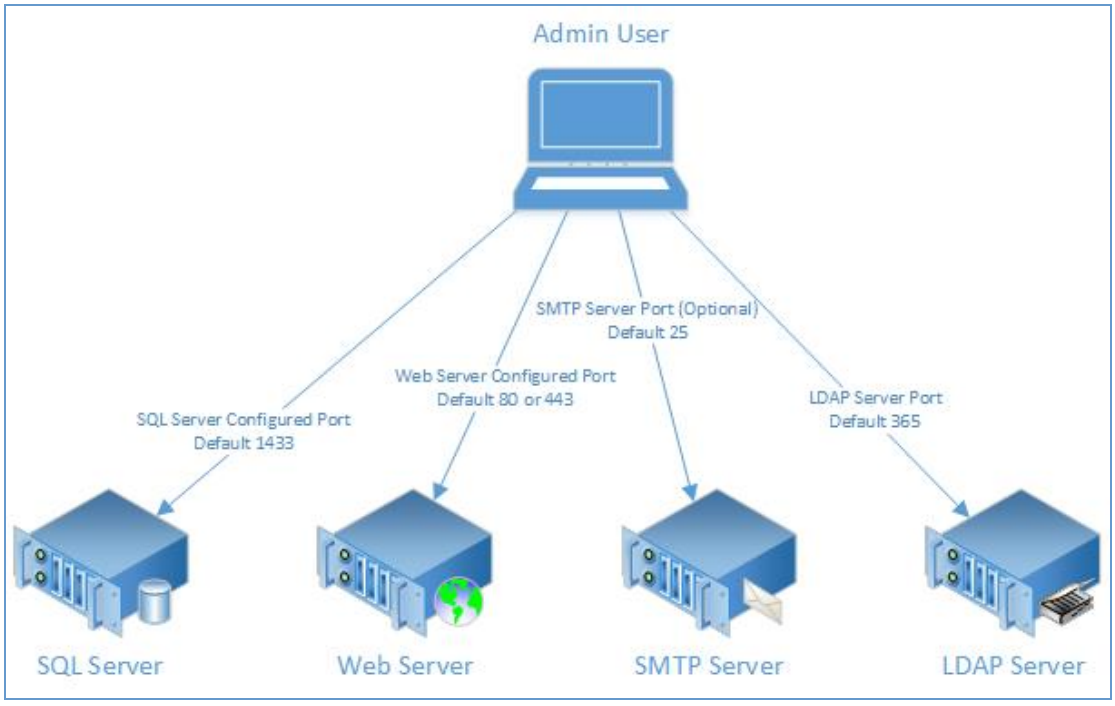


CHAPTER 164: Conventional Deployment

What is Conventional Deployment?

The conventional deployment method is delivered in a typical MSI file. This file can be run directly on a computer, or installed via an administrative push. Standard toolsets for working with MSI files can be used for deployment. If your organization already has polices and systems in place for pushing applications, this might be the preferred way to deploy the EMS Desktop Client. If you are looking for an easier way to deploy the EMS Desktop Client, see Understand EMS Desktop Client Web Deployment .

Network Diagram



CHAPTER 165: Easy Deployment with a Conventional EMS Desktop Client Deployment

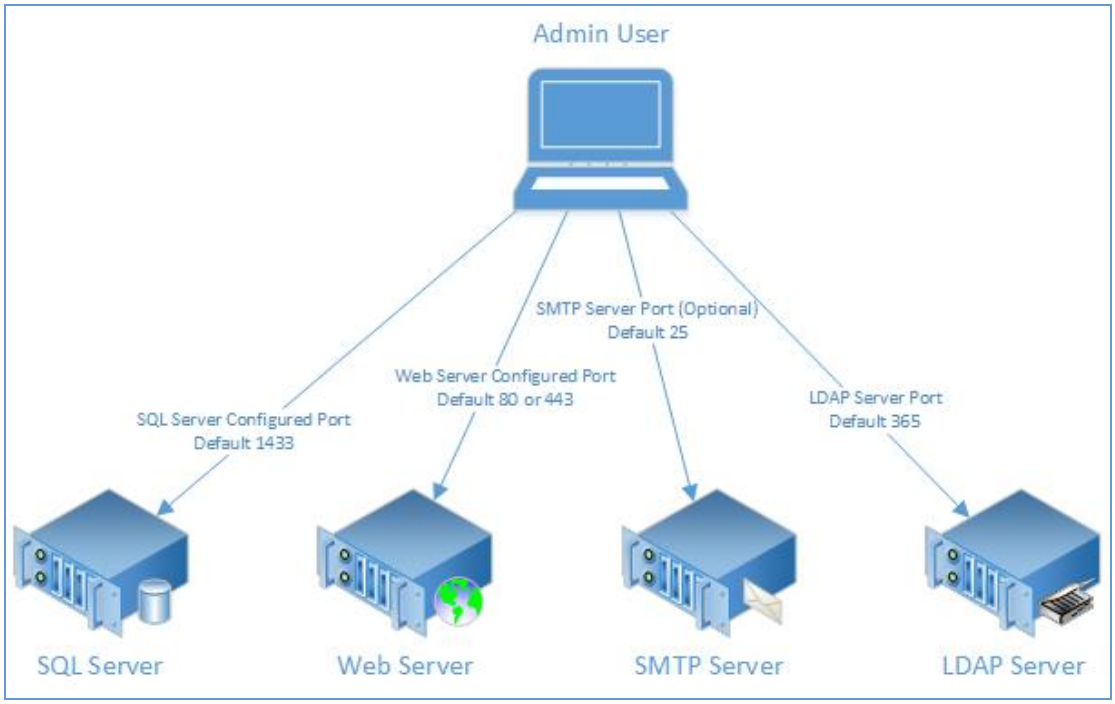
What is EMS "Easy Deployment"?

This additional application layer on the conventional deployment simplifies the deployment process for administrative users so they can deploy EMS Desktop Client software installations directly to their users' workstations. For an overview, see our webinar. It does this by running all database queries through a Web Service, which allows the database server to be isolated from the end user network. By using this tool, your users do not need to first navigate to the EMS web deploy website and download the application to their local profile.

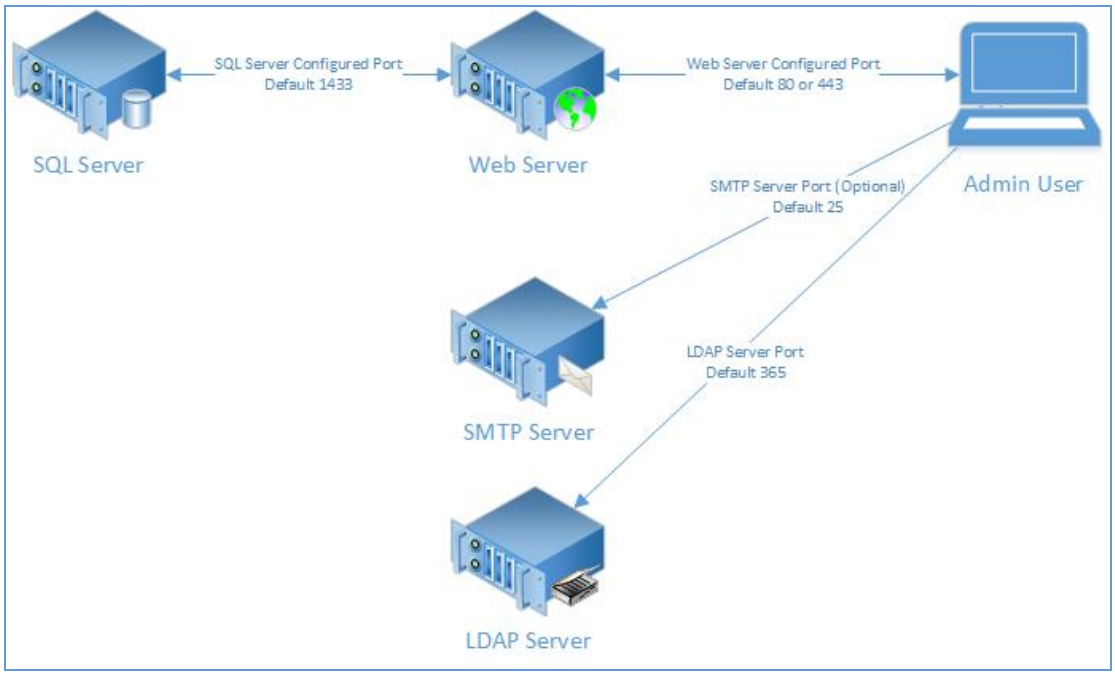
What Are My Deployment Options?

EMS Deployment is a process you can use to programmatically deploy software to your end user workstations, either via the web or using conventional methods. See the Web Deployment VS Conventional Deployment Decision guide to understand how we can handle that process for you. We recommend implementing a deployment method in order to minimize additional legwork to roll out the EMS Desktop Client to your organization.

How a Deployment Changes Standard Configurations



Standard Configuration



Configuration after completion of this topic

Prerequisites for Easy Deployment

- EMS Desktop Client installed on end users' machines
- EMS Web Deploy Service installed on a web server so end users are able to access it
- A method to remotely push a registry value into end users' registries

Modify the EMS Web Deploy Service

By default, once you install the Web Deploy Service, users will be able to download and run the desktop client directly from that service. To prevent that, you should delete or rename the install.html file within that service. This will prevent clients from being able to download the client and ensure that you can maintain the desktop installations via your application delivery policy. This will also keep the application running outside the users' network.

Modify the Desktop Client

To connect the Conventional Desktop Client to to the web service instead of directly to the database, you will need to add a String Value named "AppFacadeUrl" to the users' registry:

HKEY_CURRENT_USER\SOFTWARE\EMS Software\Version 44.1

The Value of this String will be the URL to the Web Service. For example: "http://yourwebserver.domain.local/em...ktopwebdeploy/"). Once that key is in place, any server and database keys are ignored. To revert back to a direct database connection, simply delete the Registry Key "AppFacadeUrl"

Updates

Once the Conventional Desktop client points to the Web service for Connection to the database, it will not auto-update. When it comes time to deploy a new build of the software, you will need to install the updated Web Deploy Version to update the web server side, then push the updated local client from the updated MSI file, and deploy it using your standard installation methods. See Conventional EMS Desktop Client Deployment for further information.

CHAPTER 166: Enable SSL on Web Deployment

To use EMS client web deployment with SSL, you need to perform a few extra steps (mentioned below) before you can install the desktop client. By default EMS desktop client web deployment is enabled to use with HTTP.

To enable SSL, follow these steps:

1. Install EMSDesktopClientWebDeploySetup.msi
2. Go to EMS web deploy' s virtual directory and open web.config in a notepad.
   a. Find the following section:

      Section 1

```
<services>
     <service name="EMS.AppFacade.AppFacadeService">
       <endpoint address="../AppFacadeService.svc" bind-
ing="webHttpBinding" bindingConfiguration="webBinding"
         contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior"/>
       <!-- <endpoint address="../AppFacadeService.svc"
binding="webHttpBinding"
         bindingConfiguration="webHttpsBinding" con-
tract="EMS.AppFacade.IAppFacadeService"
         behaviorConfiguration="webBehavior" /> -->
     </service>
</services>
```

   b. Uncomment the highlighted section by removing **<!--** and **-->** from the beginning and end of that statement.
   c. Then comment the first section instead by adding **<!--** and **-->** to the beginning and end of that statement. The end result will be:

```
<services>

       <service name="EMS.AppFacade.AppFacadeService">

          <!--<endpoint address="../AppFacadeService.svc"
binding="webHttpBinding" bindingConfiguration="webBinding"
            contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior"/>-->

          <endpoint address="../AppFacadeService.svc" bind-
ing="webHttpBinding" bindingConfiguration="webHttpsBinding"
            contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior" />

       </service>

</services>
```

d. Find the following section:

Section 2

```
<webHttpBinding>

     <binding name="webBinding" maxRe-
ceivedMessageSize="2147483647"/>

     <!-- <binding name="webHttpsBinding" maxRe-
ceivedMessageSize="2147483647" >

       <security mode="Transport">

       <transport clientCredentialType="None"/>

       </security>

     </binding> -->

 </webHttpBinding>
```

e. Uncomment the highlighted section by removing **<!--** and **-->** from the beginning and end of that statement.

f. Then comment the first section instead by adding **<!--** and **-->** to the beginning and end of that statement. The end result will be:

```
<webHttpBinding>

     <!--<binding name="webBinding" maxRe-
ceivedMessageSize="2147483647"/>-->

     <binding name="webHttpsBinding" maxRe-
ceivedMessageSize="2147483647" >

       <security mode="Transport">

       <transport clientCredentialType="None"/>

       </security>

     </binding>

</webHttpBinding>
```

3. Once you have modified these sections, save the web.config file and browse to EMS Desktop Client web deploy then install the EMS Desktop Client.

CHAPTER 167: Web Deployment Troubleshooting

If you experience a delay on the "first click" of major functions within the EMS Desktop Client that's too long, there are a couple of solutions. One approach is to leave EMS running all day so that you only experience the first click delay once. Another approach, which is a bit more involved, is to run a function within .NET called NGen. This function pre-compiles .NET applications to make them load significantly faster and eliminate first-click delays.

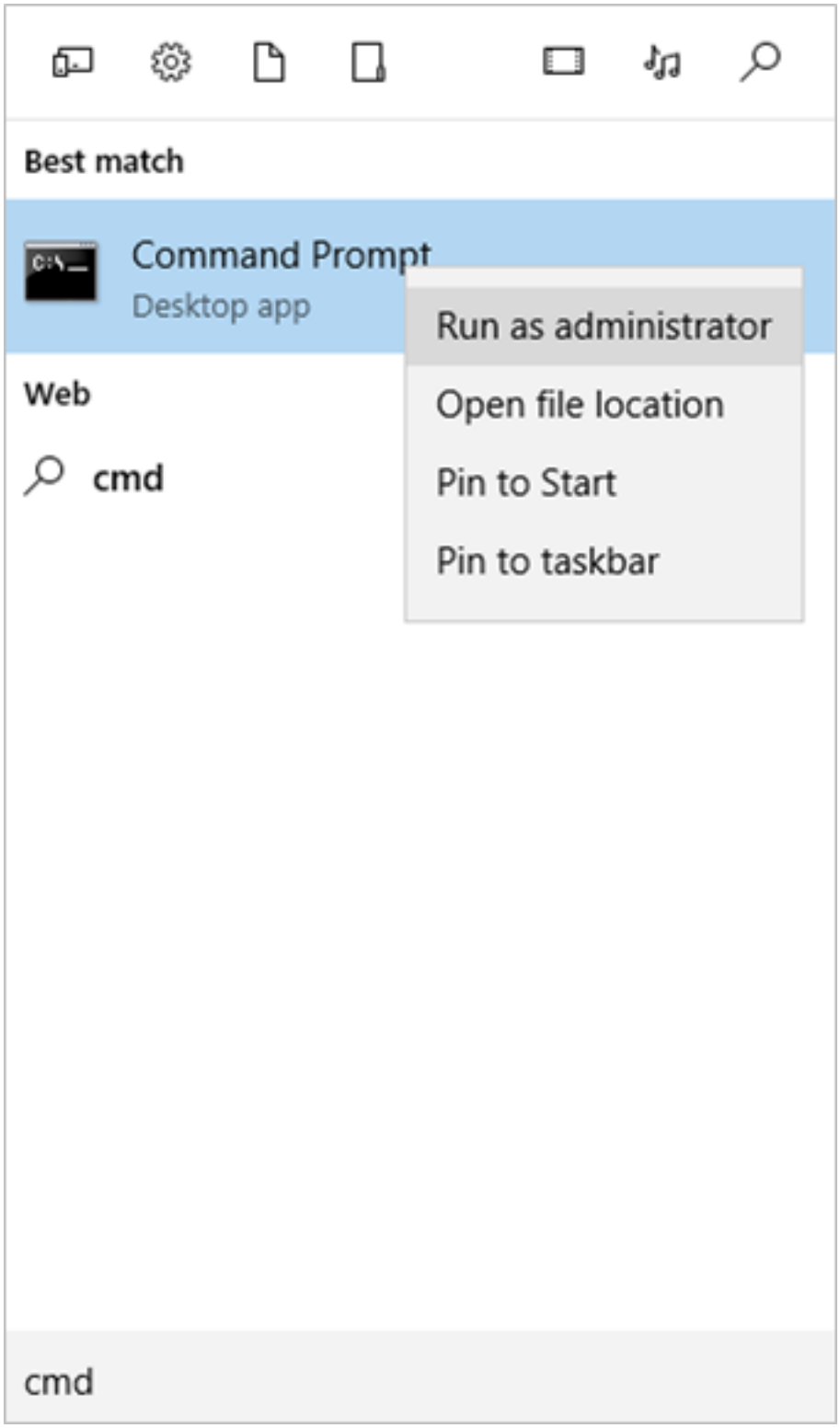
Run NGen

Note:
You must have installed EMS and you must have administrative privileges to perform the following steps.

Important!
While NGen eliminates the first click delay, EMS will not be adding it to our standard installation process; this is an optional workaround you take at your own risk.

1. Open a command prompt as an administrator as follows:
    a. Press the Windows key.
    b. Type **cmd** in the search bar.
    c. Position the cursor over **Command Prompt** as shown in the screen shot below, right click, and

select **Run as administrator**.



2. At the C:> prompt, go to the directory where EMS is installed.

   If you have conventionally installed EMS, then it's typically at the following location:

   ```
   cd \program files (x86)\EMS
   ```

   However, if you're using the web deployment option to install EMS, then you should find EMS at the following location:

   ```
   cd %appdata%\EMS2016\EMS
   ```

3. Press Enter and you should see one of the following (where [user name] is your Windows user name):

   ```
   C:\Program Files (x86)\EMS>
   ```

   ```
   C:\Users\[user name]\AppData\Roaming\EMS2016\EMS>
   ```

4. Type the following:

   ```
   \windows\microsoft.net\framework64\v4.0.30319\ngen install
   ems.exe
   ```

5. Press Enter and wait until the process finishes.

   It will take about 5 minutes. Ignore any error messages.

6. When the installation finishes, close the command prompt and run EMS.



Note:
If you install a new or updated version of the Desktop Client, you have to run NGen again if you want to eliminate the first click delay.

CHAPTER 168: EMS Desktop Client User Guide (V44.1)

This desktop application is used by expert users to automate workflows and communications for maximum scheduling efficiency. This tool enables everyday users to request space and services, see available space, check their calendar, check into meetings, change event details, end and cancel events, resolve booking conflicts, delegate space management to other users, send invitations, invoices, and notifications, approve requests, track resource usage, and track space utilization.

This user guide provides information about the following:

- Launch EMS Desktop Client
- Manage Database Connections
- User Settings
- Reservations and Bookings
- Other Reservation Functions
- The EMS Window
- The Reservation Book
- The Navigator
- The Calendar
- The Reservation Wizard
- The Browser
- People: Groups and Contacts
- The Dashboard
- Manage Services
- Search for Reservations, Bookings, Resources, and Service Orders
- Booking Check In
- Reports and Queries
- Billing
- Confirmations

See Also:

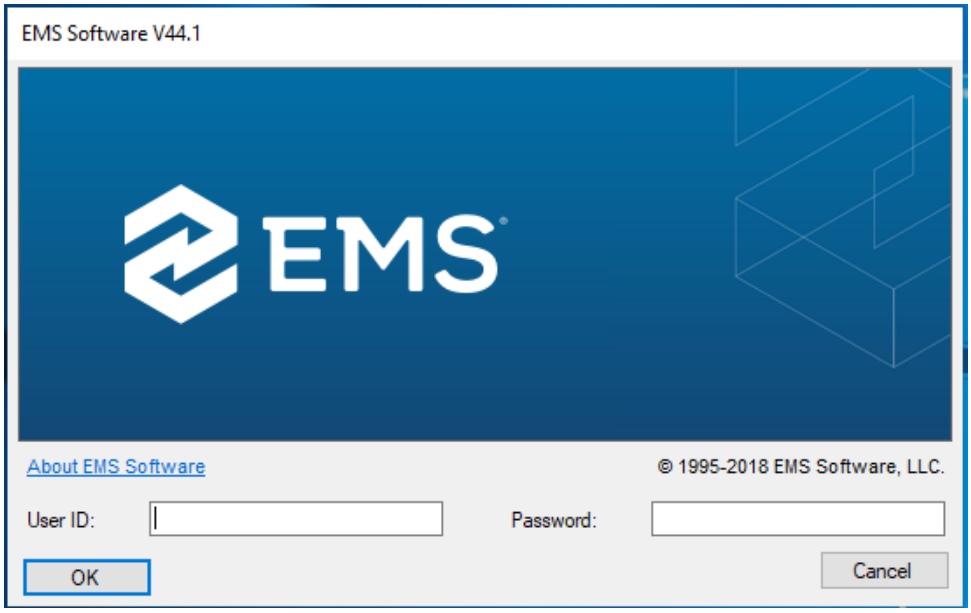
- EMS Desktop Client Configuration Guide
- EMS Desktop Client Installation Guide
- Contact Customer Support

CHAPTER 169: Launch 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.

1. Access the EMS application in either of the following ways:
   - On your desktop, double-click the EMS icon.
   - Open the Windows Start menu, in the Search field, enter EMS and then select the EMS option.

   The application launches and prompts you to enter your credentials.

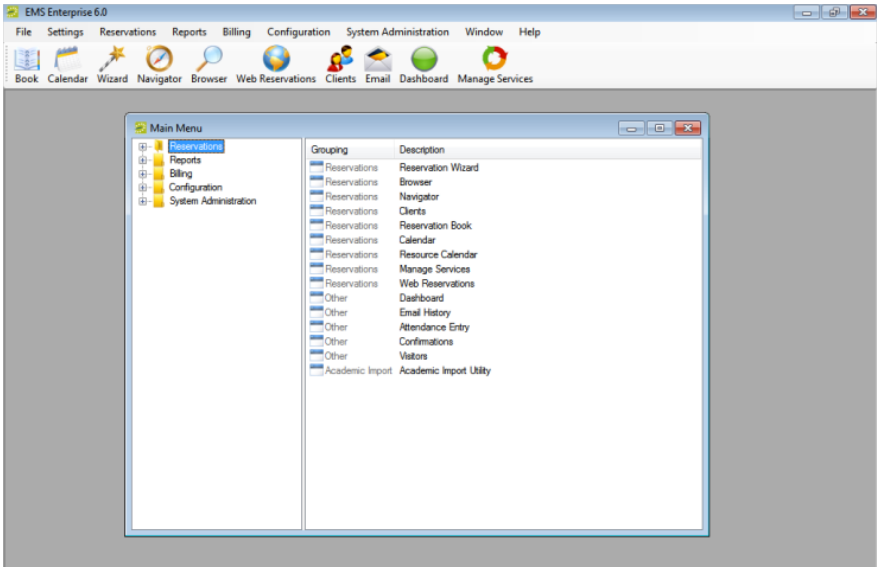


EMS Login Dialog Box

> **Note:**
> If you are the first person to log in to the EMS application at your organization, a dialog box opens where 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.

2. Enter your credentials in the **User ID** and **Password** fields.
3. Click **OK**.

The EMS Desktop Client application opens. The main menu is open in the application.

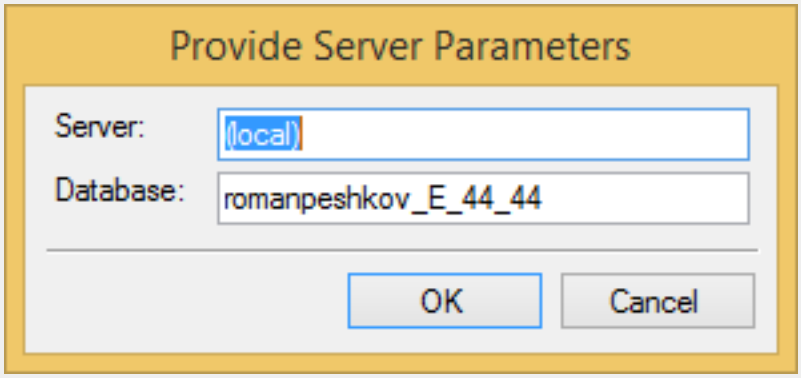


Note:

If you have an EMS Enterprise license, you can change the server and database you are connecting to by right-clicking on the About EMS Enterprise option.



This launches a pop-up window where you can choose a different server and database.



Note:

For security reasons, after you log in to EMS the first time using “admin” as both the username and password, at a minimum, we recommend that you change the account password. Ideally, you should create an entirely new administrator account with a new username and password. See Also: Configure Users.

CHAPTER 170: Manage Database Connections

> **Note:**
>
> **EMS CLOUD SERVICES CUSTOMERS**
>
> EMS Cloud Services Customers using the EMS Desktop Client Web Deployment will **not** change database connections from within the EMS Desktop Client. Please refer here for instructions on switching database connections.

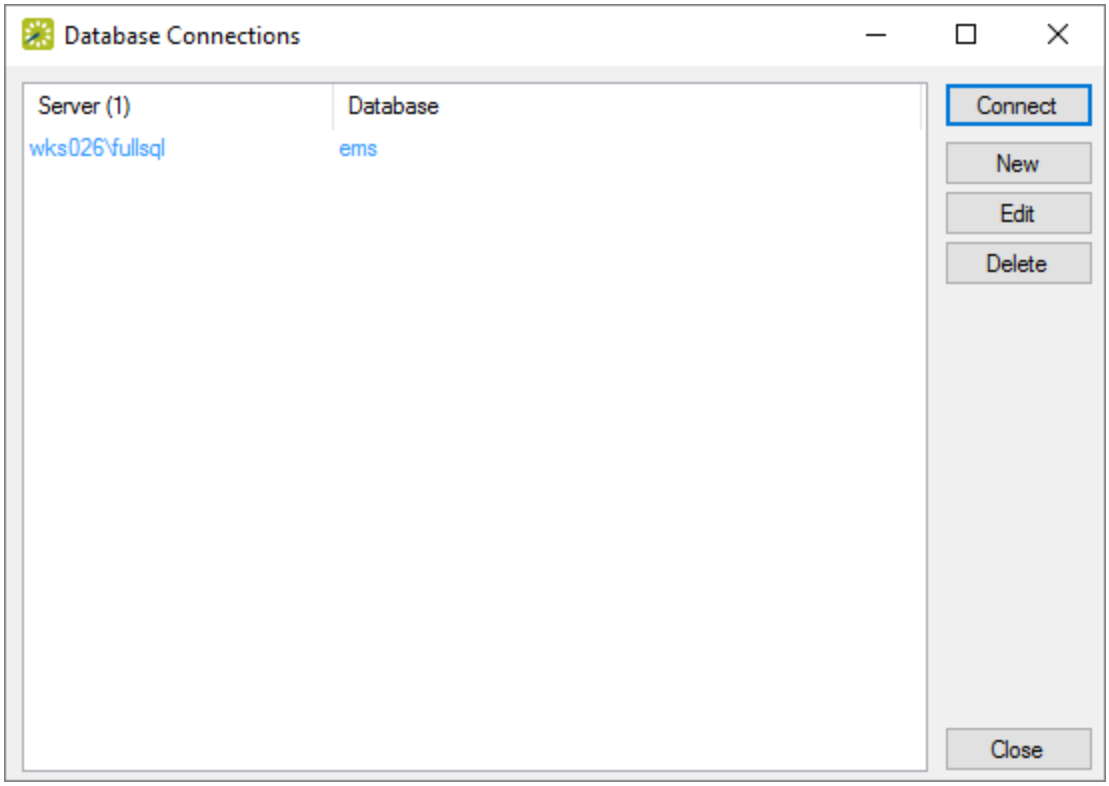
If EMS Desktop Client has been installed on your desktop using the EMS Desktop Client Web Deployment, you can point to a different database through EMS Desktop Client. Contact your system administrator for guidance in databases to use.

This topic provides information on how to:

1. Change databases
2. Create a new database connection

Change Databases

1. On the EMS Menu, select **File** > **Change Database** to bring up the Database Connections window.



> **Note:**
> Any database connection listed in blue is a system record inherited from the EMS Desktop Client Web Deployment that can not be deleted.

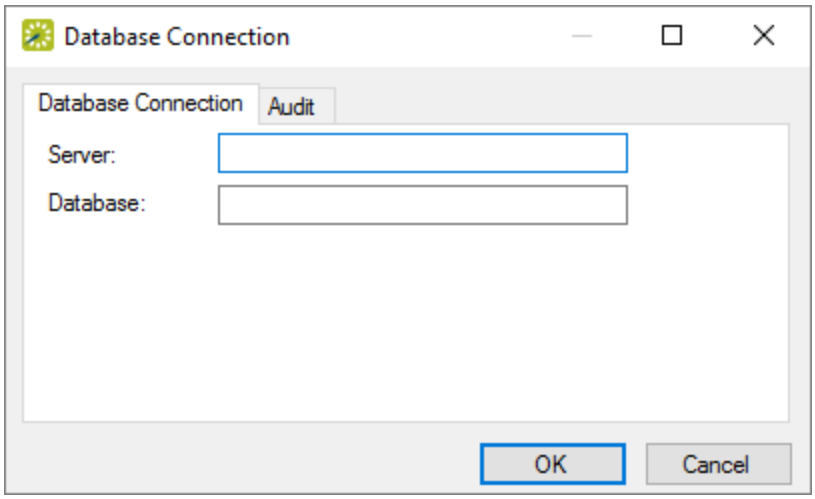
2. To connect to a database that is not the system database select it from the list of Database Connections then press the 'Connect' button. This will close and reopen the EMS Desktop Client connected to the selected database.

> **Note:**
> The user will need to log in again after changing databases.

Create a New Database Connection

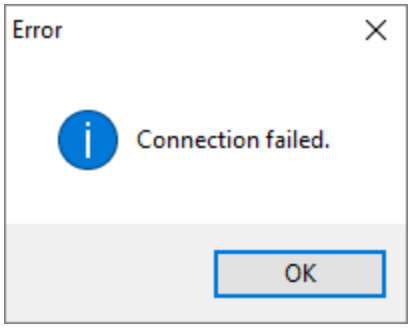
1. To create a New connection select 'New' in the Database Connections window (shown above) to bring up the Database Connection window.

2. Type in the SQL server and EMS database name then select 'OK' to save the connection. You can delete connections later when you no longer need them.



3. For EMS to save this connection it will first check to see if it is a valid connection. If the connection is

invalid, it will not be created you will see this error message:



CHAPTER 171: User Settings

As an EMS Desktop Client user, you can manage multiple aspects of your account for a superior user experience.

This section provides information on the following settings:

- Set user preferences and default values
- Change your password
- Reset window coordinates
- Reset column settings
- Define your views

Set 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 drop-down 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.

1. On the EMS main menu, click **Settings** > **Preferences**. The Preferences dialog box opens. The Preferences tab is the active tab.

2. Edit your user preferences as needed.

Field	Description
Close Report Setup After Running Reports	
Time Drop Down Interval	The time interval displayed on a Time drop-down list (for example, if you select 30 minutes, then options on the drop-down list are displayed as 1:00 1:30, 2:00 and so on). All Time drop-down 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	
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 Gmail	
Use Microsoft® Outlook	
SMTP Email	Contact your EMS administrator with assistance in specifying these values.

Field	Description
	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.

Fields	Description
Building Status Event Type Event Name Event Time Reservation Source Time Zone/Display Audit Times in This Time Zone Drawing Application Payments 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.

Change 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.

1. On the EMS main menu, click **Settings** > **Change Password**. The Change Password dialog box opens.
2. In the Old Password field, enter your current EMS password.
3. In the New Password field, enter the new password.
4. In the Re-enter New Password field, enter your new password again, exactly as you entered it in the New Password field.

5. Click **OK** to close the Change Password dialog box. The next time that you log in to EMS, you must use your new password.

Reset Window Coordinates

1. On the EMS main menu, click **Settings** > **Reset Window Coordinates**.
2. You will receive a prompt notifying you that window coordinates have been successfully reset.

Reset Column Settings

1. On the EMS main menu, click **Settings** > **Reset Column Settings**.
2. You will receive a prompt notifying you that the column settings have been successfully reset.

Define Your Views

1. On the EMS main menu, click **Settings** > **My Views**. The My Views dialog box appears.
2. To create a new view, click **New**.
3. Under the **View** tab, provide a Description and Notes.
4. Under the **Rooms** tab, you can search for rooms by **Building** or **Room Type**.
    - To search by Room Type, choose a **Room** from the Room Type drop-down. A list will appear on the left-hand side of the View screen, including the available rooms, description, building, and room type
    - To search by Building, choose a **Building** from the Building drop-down. A list will appear on the left-hand side of the View screen, including the available rooms, description, building, and room type
    - Highlight the desired room and click **>** to select the room. To select multiple rooms, click **>>** or **<<** to remove the selected rooms.
5. Click the **Audit** tab to view details on the View, including the date it was added, who it was added by, the date it was changed and who it was changed by.
6. Click **OK** to save your View.

CHAPTER 172: 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, the concept of an event timeline for a reservation booking, and how to make a reservation. This section covers the following topics:

- Reservation Structure
  - Reservations
  - Booking Details
- Event Timeline

Reservation Structure

An event in EMS Desktop Client is comprised of the following:

1. A **Reservation**
2. One or more **Bookings**
3. 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.

Reservations

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 Desktop Client:

- **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.

Variable	Time
Reserved Start Time	8:00 a.m.
Setup Hours	1 hour
Event Start Time	9:00 a.m.
Event End Time	4:00 p.m.
Teardown Hours	1.5 hours
Reserved End Time	5:30 p.m.
Reserved Time	9.5 hours

CHAPTER 173: Other Reservation Functions

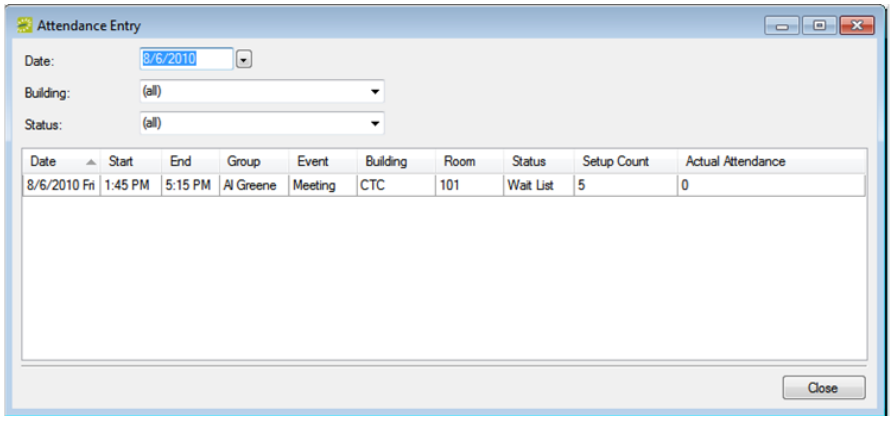
EMS Desktop Client contains several miscellaneous standalone functions to assist you in managing and maintaining reservations and bookings in your system as well as managing your general work requirements.

- Record Actual Attendance Numbers for Bookings
- Manage Attendees and Visitors
  - View Visitors
  - Check In Visitors
  - Import a List of Visitors to a Meeting
  - Generate Attendee Visitor Reports

CHAPTER 174: Record Actual Attendance Numbers for Bookings

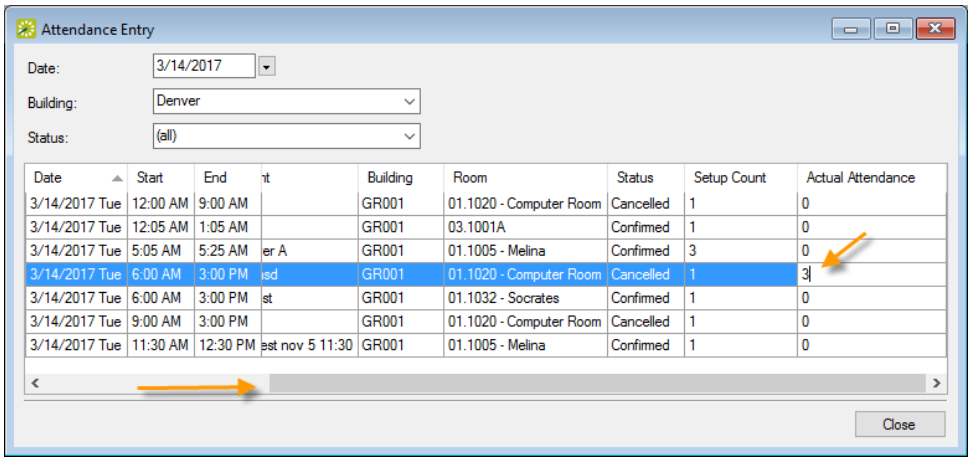
You use the Attendance Entry tool to view and record the actual attendance for bookings. (The tool does not address reservation-level attendance.) The actual attendance numbers that you enter do not replace the setup count (i.e., the estimated attendance) that you entered prior to an event. Reports that provide attendance information typically provide both the estimated attendance and the actual attendance.

1. On the EMS main menu, click **Reservations** > **Other** > **Attendance Entry**. The Attendance Entry window opens.



2. In the **Date** field, select a date for which you are recording the booking attendance, on or before the current day's date. You can filter the results by building and/or a booking status.

3. For each booking as needed, scroll right to the Actual Attendance column, double-click in the field to select the currently displayed value, and then enter the actual attendance number in the column.



4. Click **Close**.

CHAPTER 175: Manage Attendees and Visitors

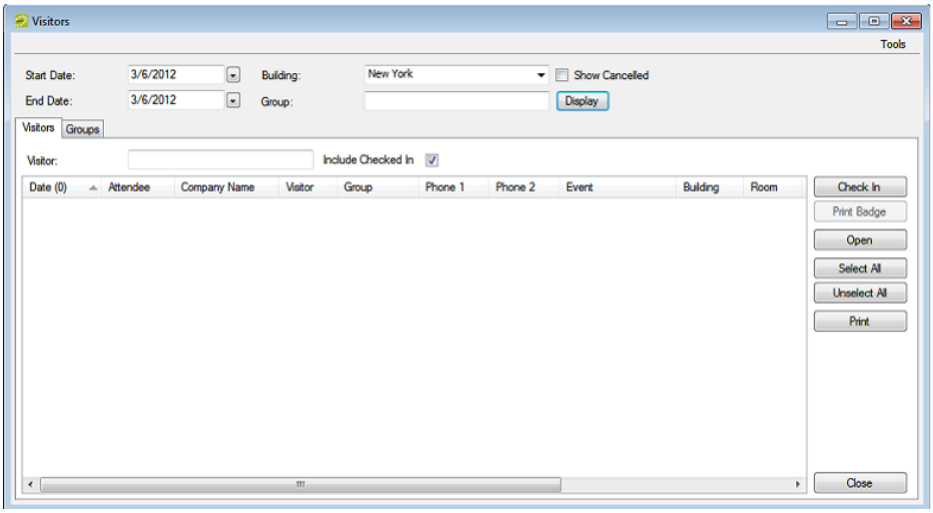
Visitor management is an optional feature that your administrator can enable on booking templates so that visitors can be added to your meetings in EMS Desktop Client and EMS Web App (or VEMS if on V44). If the feature is enabled, you can:

- View Visitors
- Check in Visitors
- Import a List of Visitors to a Meeting
- Generate Visitor Reports

CHAPTER 176: View Visitors

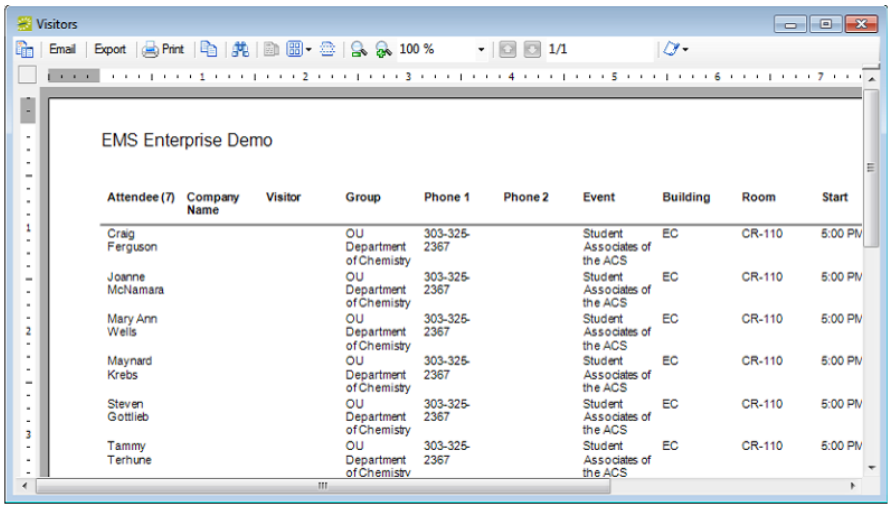
If visitors have been entered in your system, you can look them up in EMS Desktop Client.

1. On the EMS menu bar, click Reservations > Other > Visitors. The Visitors window opens on the Visitors tab.



2. Specify 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.
   - 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 refreshes to match your search criteria.
4. Optionally, do one or more of the following:
   - To see the booking linked to the person, 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.
   - To check a person in, 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. (you can do the same to Check Out once people have checked in).

- To export a list of people to a spreadsheet, on the Tools menu, click Export to export the list of attendees/visitors to a spreadsheet.
- To print a list of people, 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.



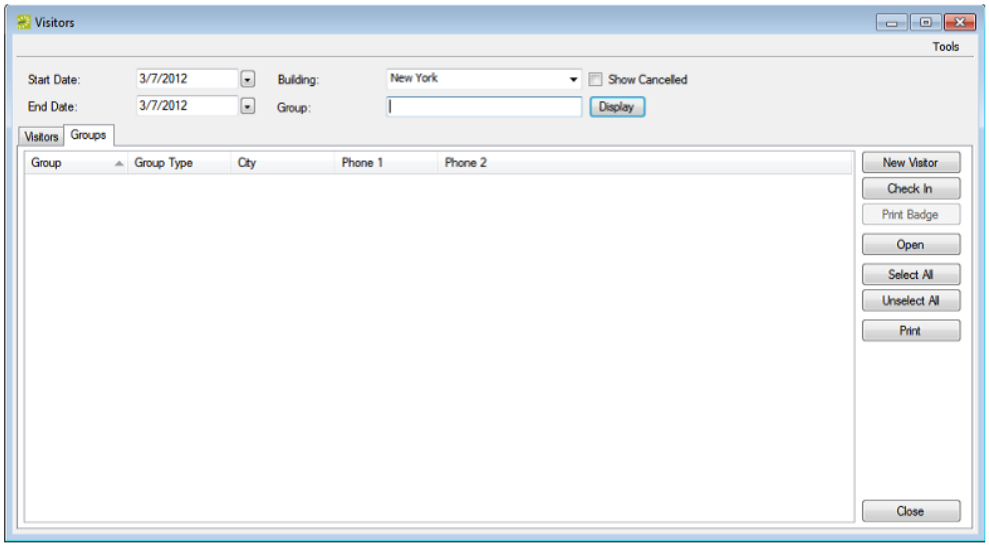
CHAPTER 177: Check in Visitors

This topic will provide information on:

- Check a new visitor into a meeting
- Check visitors into a meeting
  - Check in from the Booking Check-In Dashboard
- Checking in from the Reservation Book

Check a New Visitor into a Meeting

1. On the EMS menu bar, click **Reservations** > **Other** > **Visitors**. The Visitors window opens.
2. Open the **Groups** tab (sometimes re-labeled "Employees" or "Customers").

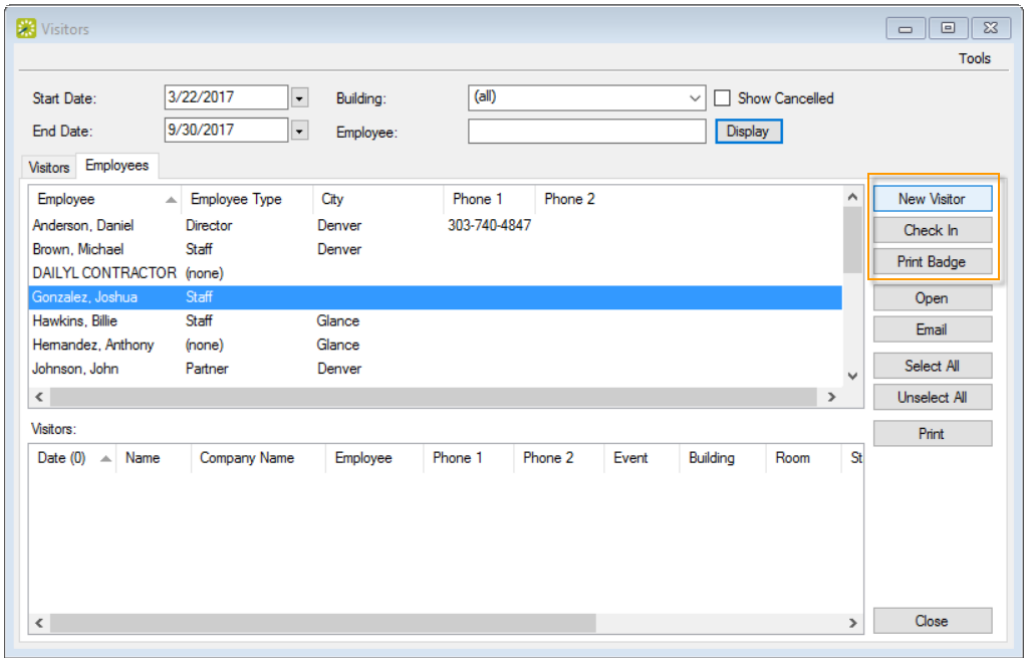


Note:
Once you have added the new visitor, the **Print Badge** button becomes enabled on the screen above so you can print badges.

3. Find the group or individual hosting the new visitor; specify 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.

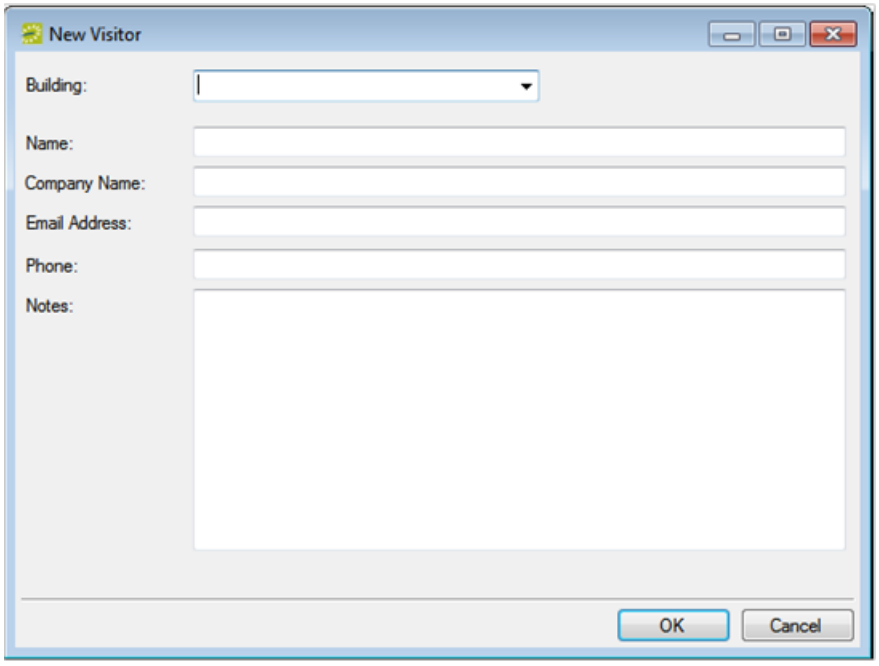
4. Click **Display**. The groups and people that meet your search criteria are displayed in the middle pane of the Visitors window.



Note:

You can see the booking a person is attending by clicking Open; this opens the reservation in the Navigator that contains the booking that the unregistered visitor is attending.

5. Select the hosting group from the search results, and then click **New Visitor**. The New Visitor dialog box opens. When you create this visitor account, they will be associated with the group or individual you selected in the window above.



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.

Note:

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.

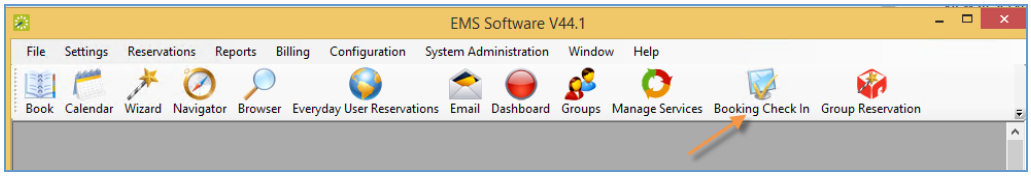
7. Repeat above steps as needed to add all new visitors to the event. The information in the Event column for each new visitor is determined by your Administrator's settings (specified when configuring the event building). For example, “Unregistered Visitor” might be displayed. The date and time when you add an unregistered visitor to an event is used as the Check-In date and time for the visitor.

Check Visitors Into a Meeting

If authorized, you can check unregistered visitors into a meeting from the Main Menu or the Reservation Book.

Check in from the Booking Check-In Dashboard

1. Select **Booking Check In** from the menu bar in EMS Desktop Client.

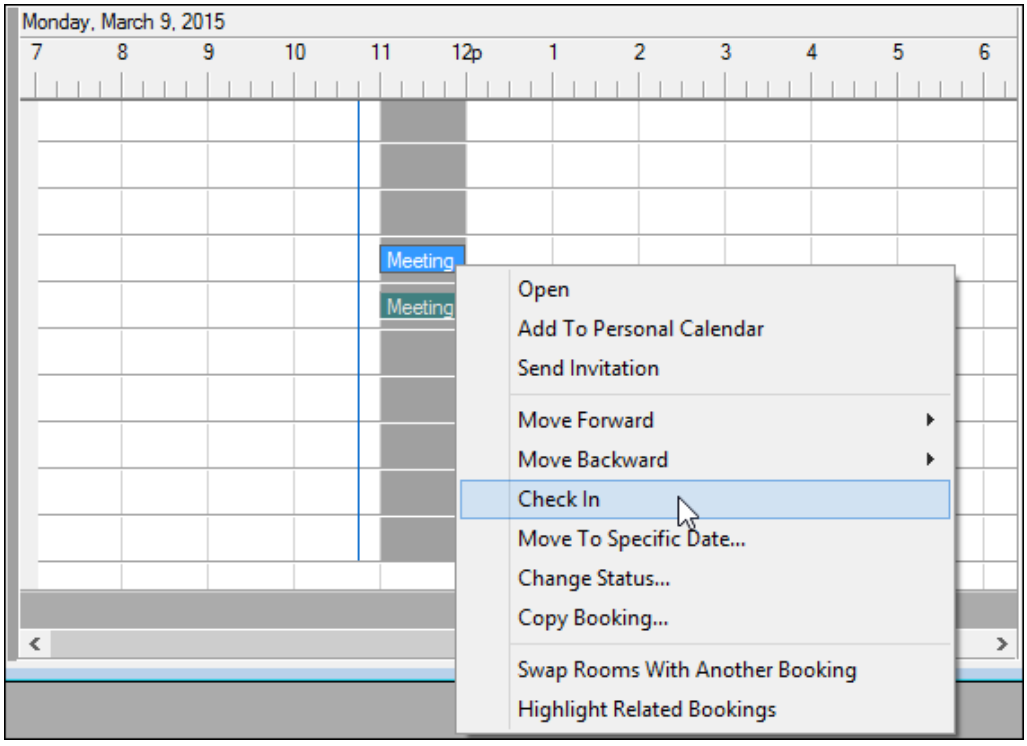


2. Set filters to search for bookings you want to check into.
3. Select an event from the list of results that displays and click the **Check In** button.

> **Note:**
> This feature replaces the Building and Booking Check In tools in previous releases.

Checking in from the Reservation Book

Bookings in the Reservation Book can be checked into by right-clicking on the booking and selecting Check In.



CHAPTER 178: Import a List of Visitors to a Meeting

To import a list of visitors to a meeting, you will

- Ensure your list of visitors is ready for import.
- Navigate to the meeting you want to work with.
- Import your list of visitors.
- Select the meetings within the reservation to which to add your list of visitors.
- Confirm and finalize.

Important!

To utilize the Advanced Visitor Management Module, an additional license must be purchased. Without this optional module, users must add visitors manually and the "Import" and "Print Format" buttons will not be available.

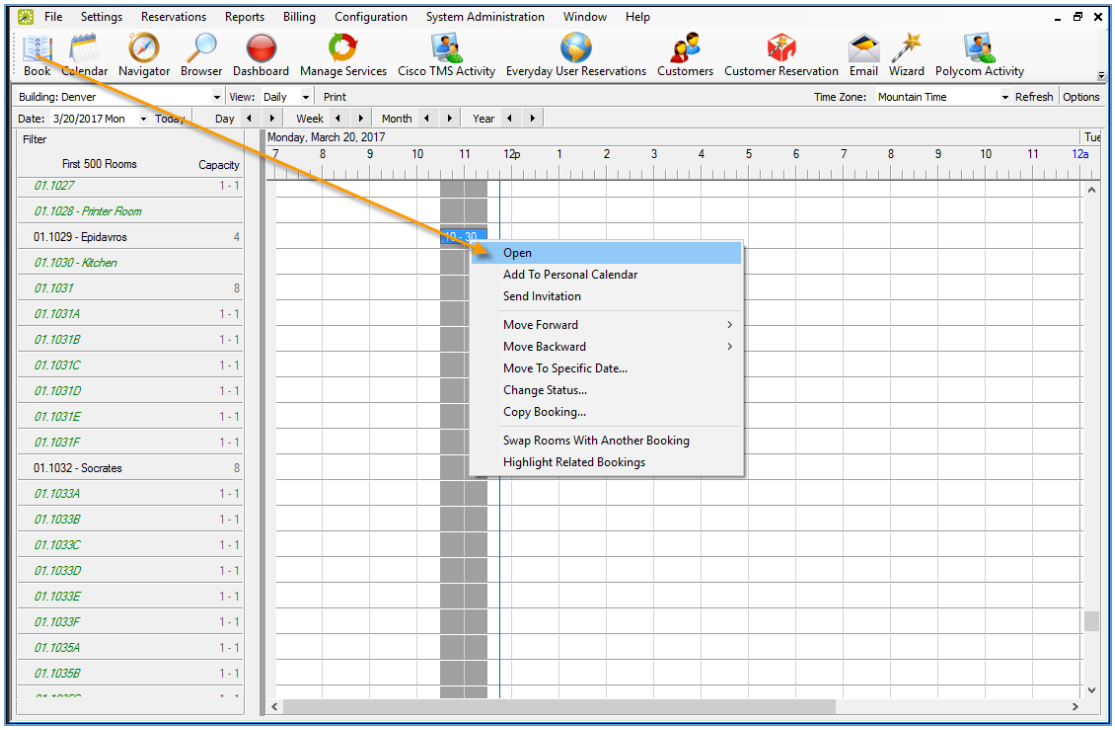
1. Your list of visitors must be a tab-delimited spreadsheet that contains the information (in the order listed) for the visitors you want to import. Each visitor must be a separate line entry.

Field	Description	Required/Optional
Visitor	True/False	
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
Name	Text. 50 characters maximum.	Required

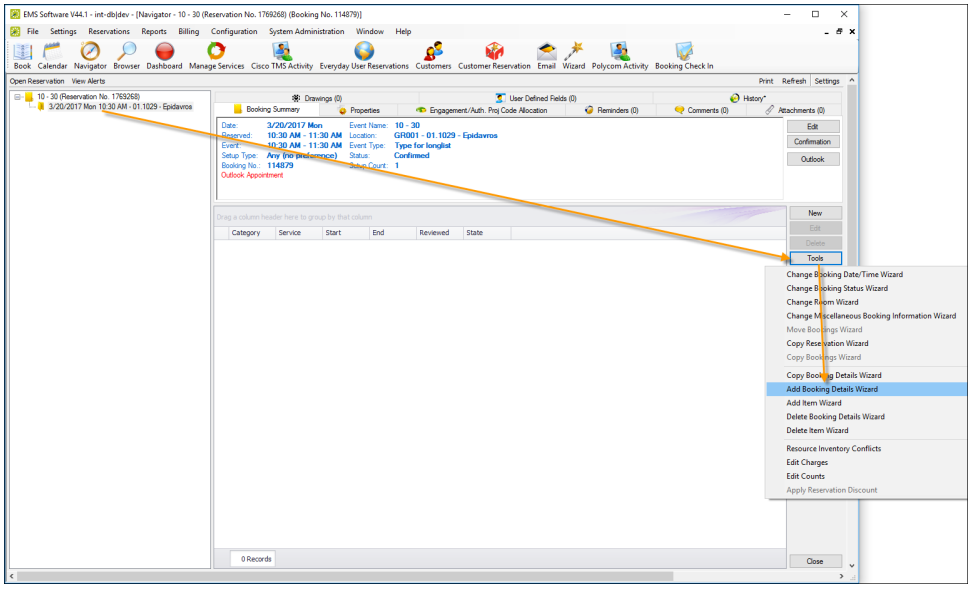
Note:

You can click **Print Format** on the second page of the Add Booking Details Wizard (described below) to see the required format for the tab-delimited file.

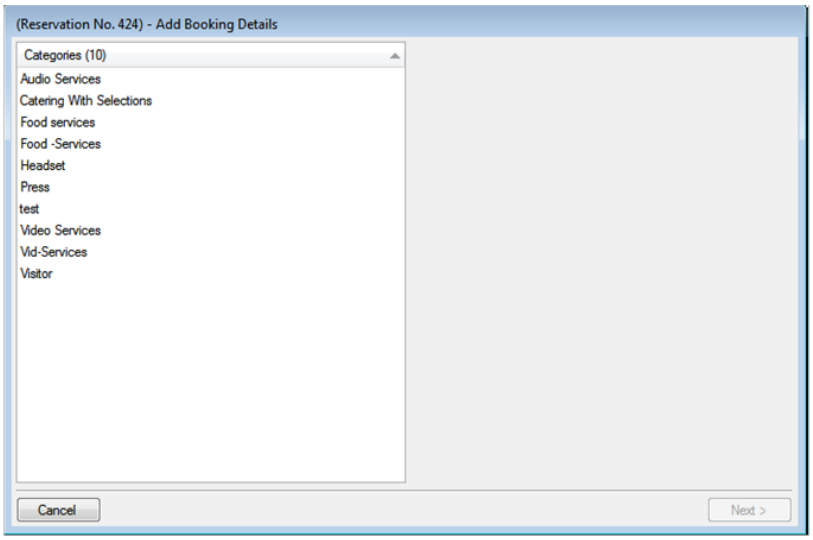
2. Open the reservation from the Reservation Book.



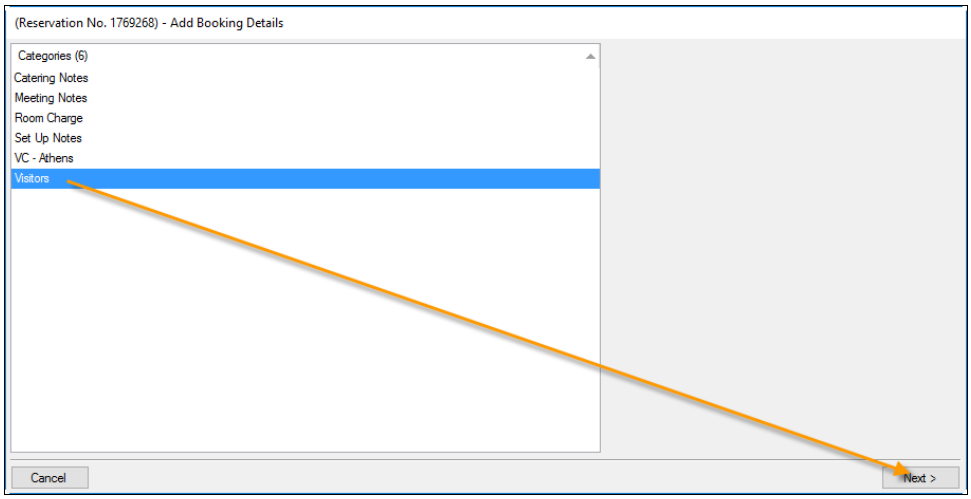
3. In the left pane of the Navigator window that opens, select the meeting for which you are importing the list of attendees/visitors, and in the Bookings pane on the right, click **Tools**, and then select **Add Booking Details Wizard**.



4. The Add Booking Details wizard opens.

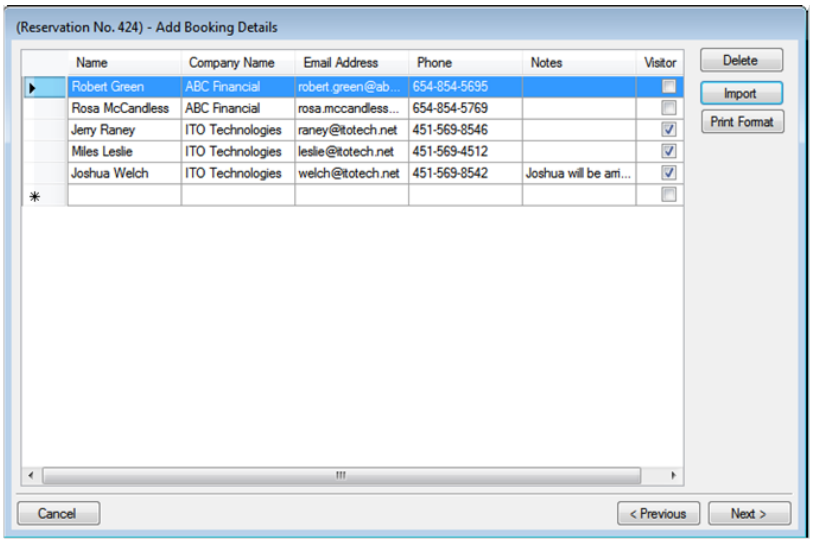


5. Select Visitors or Attendees, and then click **Next**.

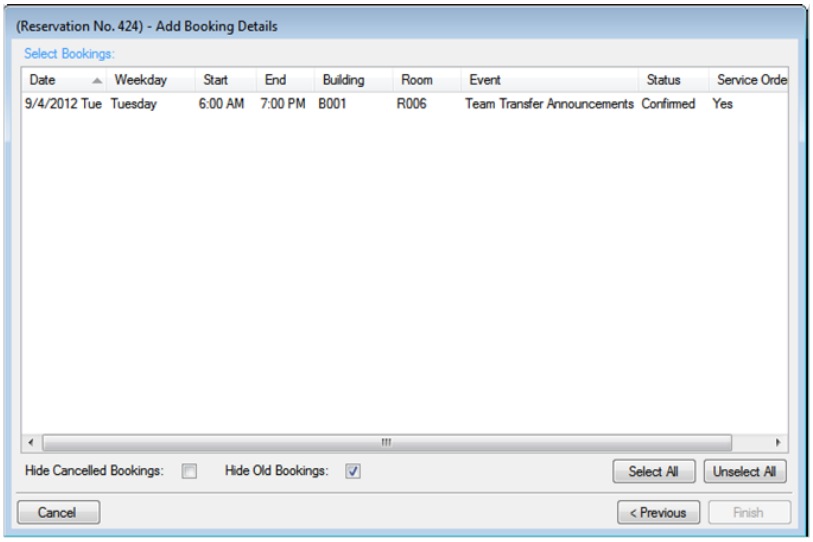


6. The second page of the Add Booking Details Wizard opens with a blank row for adding an attendee/visitor to the event.

7. Click **Import**. The Open File dialog box opens. Browse to and select your visitor list spreadsheet, and then click **Import** to import the file. The Add Booking Details Wizard is updated with the imported attendee/visitor information. Each imported visitor is a separate line entry in the Wizard.



8. Click **Next**. The Select Bookings window opens, listing all the bookings within the selected reservation with a date on or after the current day's date, *and* that do not already have the visitor list added.



> **Note:**
> To show canceled bookings, clear the Hide Canceled Bookings checkbox. To hide them, select the option. To show all bookings regardless of date, clear the Hide Old Bookings option.

9. Select the meetings to which to add your visitor list (use CTRL+click or Select All to select multiple meetings), 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.

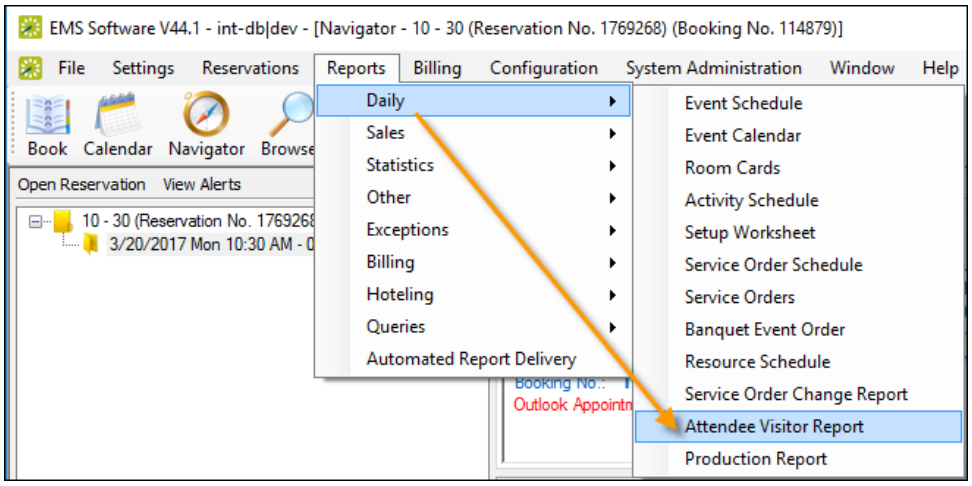
11. Click **OK** to close the message and return to the Navigator.

    The booking detail (Visitors) and its items (visitors) are displayed as folders under the appropriate booking folders in the Navigator.

CHAPTER 179: Generate Attendee Visitor Reports

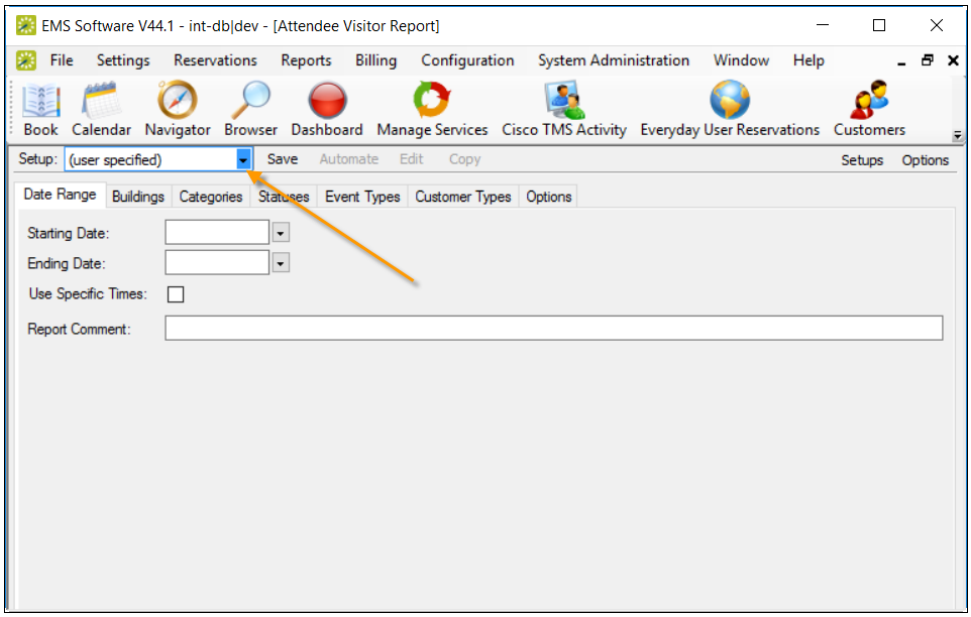
To generate a daily report of visitors, follow the steps below.

1. On the main menu, click **Reports** > **Daily** > **Attendee Visitor Report**.



Access Attendee Visitor Report from the Reports Menu

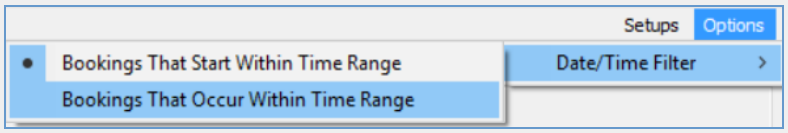
2. On the Setup drop-down list, you can select from a list of saved visitor reports for your organization, or you can set your own report parameters, options, and so on (leave "user specified" selected and populate the fields on each tab as needed). If using a saved report Setup, simply specify a date range.



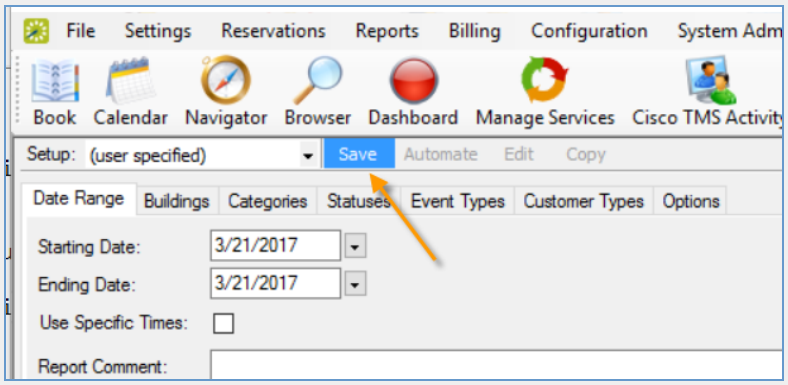
Setup Drop-Down List of the Attendee Visitor Report Dialog Box

Note:

You can edit saved report setups from the Setups option in the upper right corner. Additionally, you can quickly specify a date range based on when bookings start or when they occur using the Options menu next to it.



To save your (user specified) report for future use (so that it is listed in the Setup drop-down): click **Save** next to the Setup field.



3. To run the report once you have specified parameters, click **Print**. When finished, click **OK** on the Print dialog and click **Close** on the Attendee Visitor Report dialog box.

CHAPTER 180: The EMS Main 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:

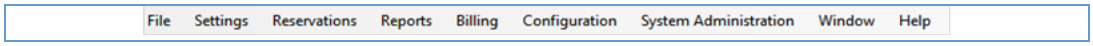
- Title Bar
- Menu Bar
- Toolbar
- Main Menu

Title Bar

The name of the software, EMS Software, and the version number of the application appear in the title bar across the top of the main window.

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.

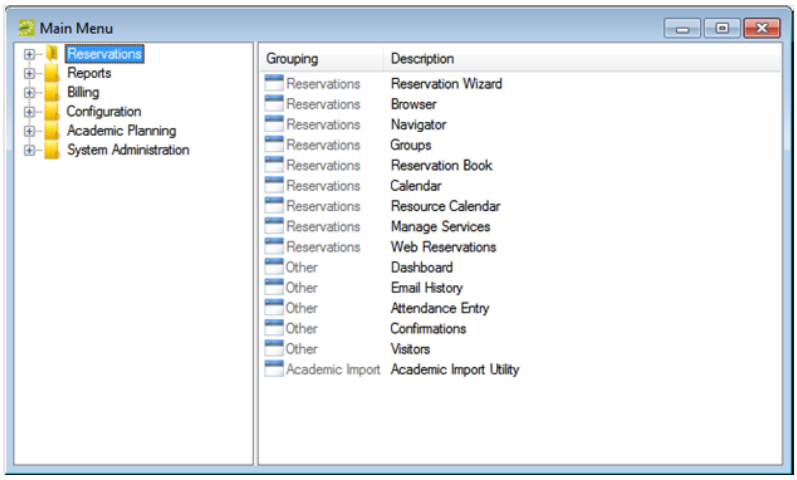


Toolbar

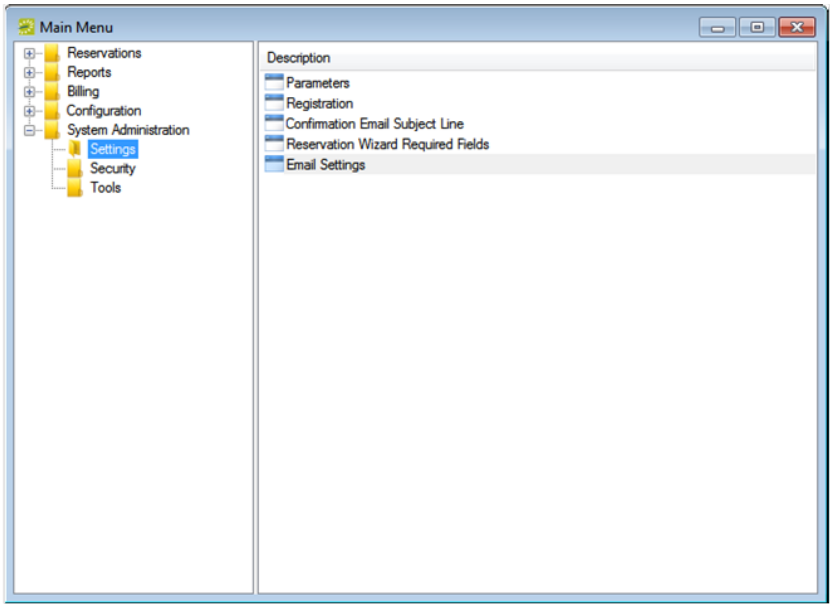
The toolbar provides quick access to the most commonly used functions. The toolbar buttons that are always displayed by default are the buttons for Book, Calendar, Wizard, Navigator, Browser, Everyday User Reservations, Clients, Email, Dashboard, and Manage Services. Other buttons for other functions are also displayed by default depending on the version of EMS that you are running, for example, EMS Academic Planning 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. See Also: Toolbar Buttons.

Main Menu

The main menu gives you access to the main EMS functions: Reservations, Reports, Billing, Configuration, and System Administration.



The main menu is arranged in a hierarchical 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 perform 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.



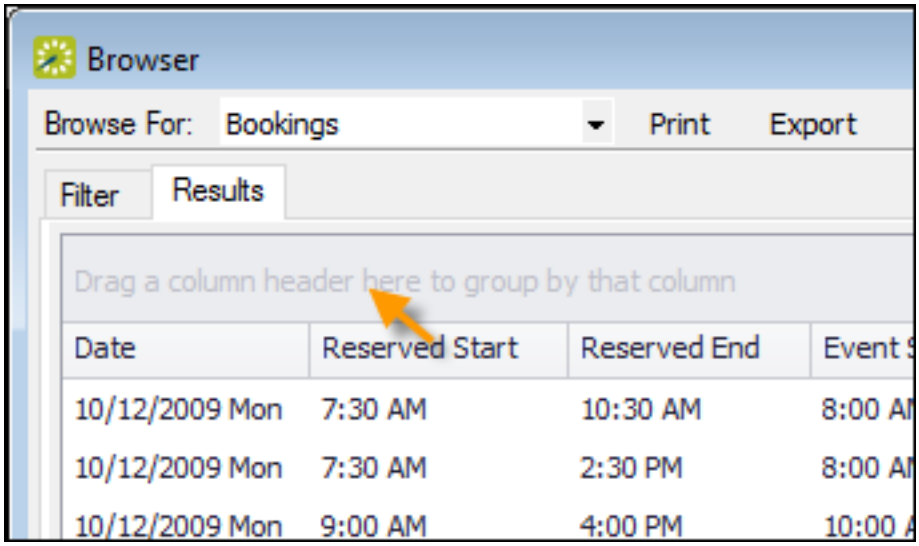
You can always close the main menu by clicking the **Close** button in the upper right corner. To open the main menu again, on the menu bar, click **File** > **Show Main Menu**.

CHAPTER 181: Work with the EMS Windows

This topic guides you in modifying the size and manner of viewing information in most pages or "browser windows" in EMS Desktop Client.

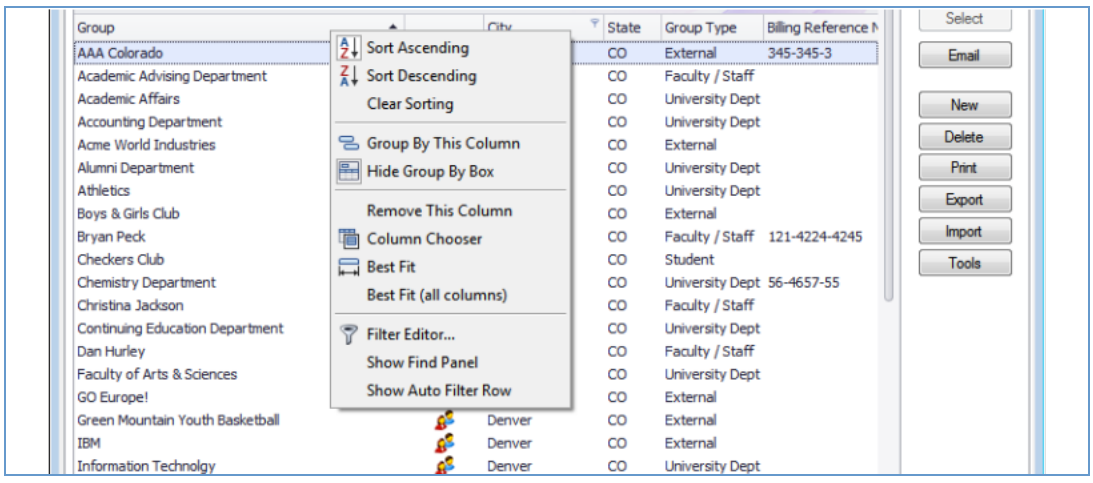
Click-and-Drag

Column headers and borders enable you to change column location, order, or width. When a window offers the option shown below, you can click and drag a column header to group data by that column.



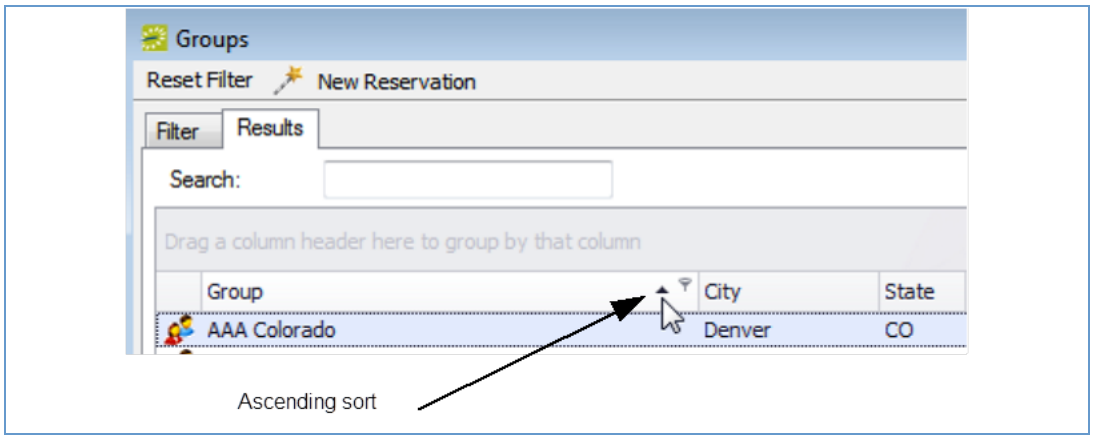
Right-Click Column Menu

These menus let you sort, hide, and group lists and resize.



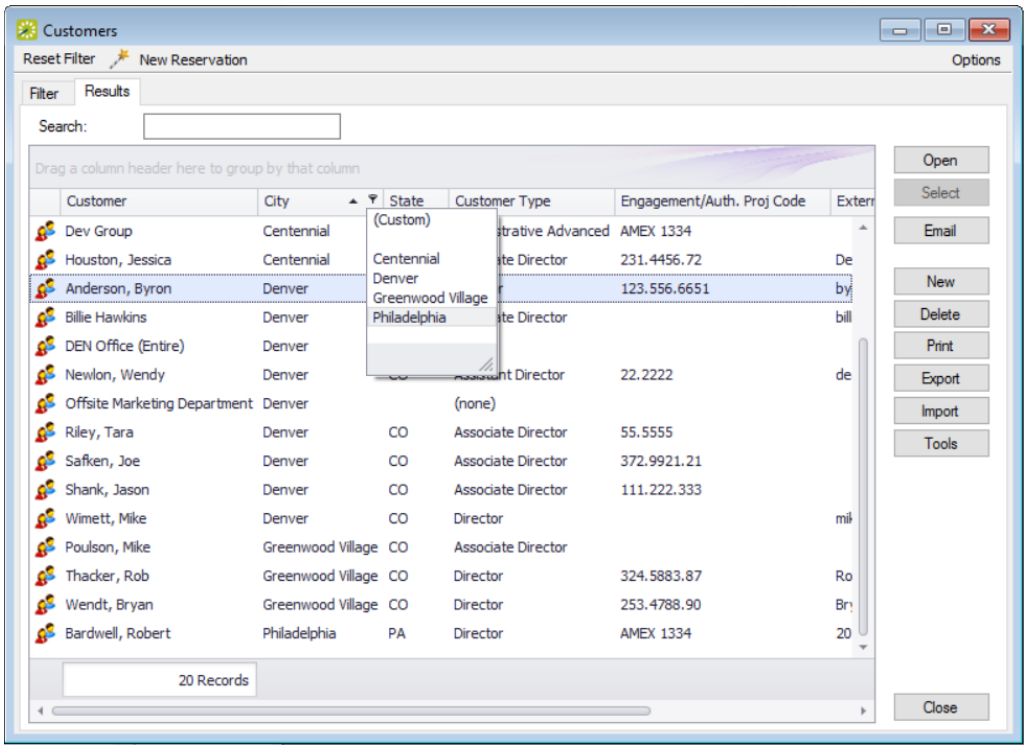
Column Sort Arrows

Use the up/down arrows in each header to quickly sort a column in ascending or descending order.



Column Filters

Filtering options help narrow down lists.



CHAPTER 182: Toolbar Buttons

The toolbar always displays buttons for Book, Calendar, Wizard, Navigator, Browser, Everyday User Reservations, Groups, Email, Dashboard, and Manage Services. Other buttons for other functions might also display, depending on the version of EMS that you are running (such as EMS Campus or EMS Workplace) and additional components your organization might have installed, such as EMS Glance or the EMS Polycom Interface. 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; keep in mind that your System Administrator might have re-labeled these options with different names than the examples shown in this topic.



Note:

If you are new to EMS Desktop Client, we recommend that you print out this Toolbar Cheat Sheet.

Book

Often called the "Reservation Book," this window shows all confirmed reservations (time and room) for your organization. Canceled bookings are not shown. You can use the Book to view and edit existing reservation, and to make new reservations. For detailed instructions, See Also: Using the Reservation Book.

Calendar

You use the Calendar to quickly find for reservations, bookings, and service orders using basic or advanced criteria; results are displayed in a calendar view. See Also: Using the Calendar.

Wizard

You use the Reservation Wizard to make reservations using a streamlined booking template. See Also: Using the Reservation Wizard.

Navigator

The Navigator enables you to to view and manage all aspects of a reservation including bookings and booking details. This window also presents whenever you open a reservation for editing from other pages in EMS Desktop Client. See Also: The Navigator Overview.

Browser and Everyday User Reservations

Authorized users can use the Browser or Everyday User Reservations Browser to search at a very detailed level for reservations, web reservations, bookings, service orders, resources, and queries. See Also: Search with the Browser.

Groups

Your organization might have re-labeled this button, "Customers" or "Employees." You can use this browser to search for groups or individuals and reservations and bookings made on their behalf. See Also: Groups and Contacts.

Email

If your system is configured to use SMTP email, clicking this button launches a generic email window. For detailed instructions, See Also: Sending Email from EMS.

Dashboard

Authorized users can access this window for centralized information about reservations in a single location. They typically use this feature to plan day-to-day tasks, such as set and check reminders, send or read notifications, approve or check the status of meeting and service order requests, and review the latest changes to events. See Also: Overview of the EMS Dashboard.

Manage Services

You use Manage Services 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 un-reviewed. You can also open a resource in the Navigator, and edit it if necessary. See Also: Manage Services.

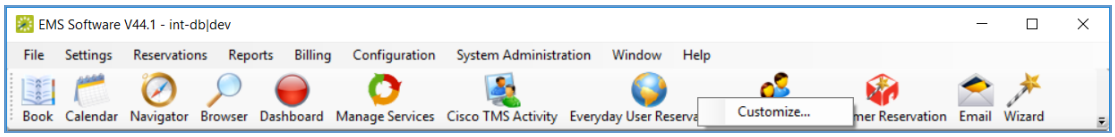
Group Reservations

If your organization has licensed EMS Workplace, you might see Group Reservation icon in your toolbar. This feature enables you to manage and make reservations for Groups in a centralized location. See Also: Work with Information for a Group.

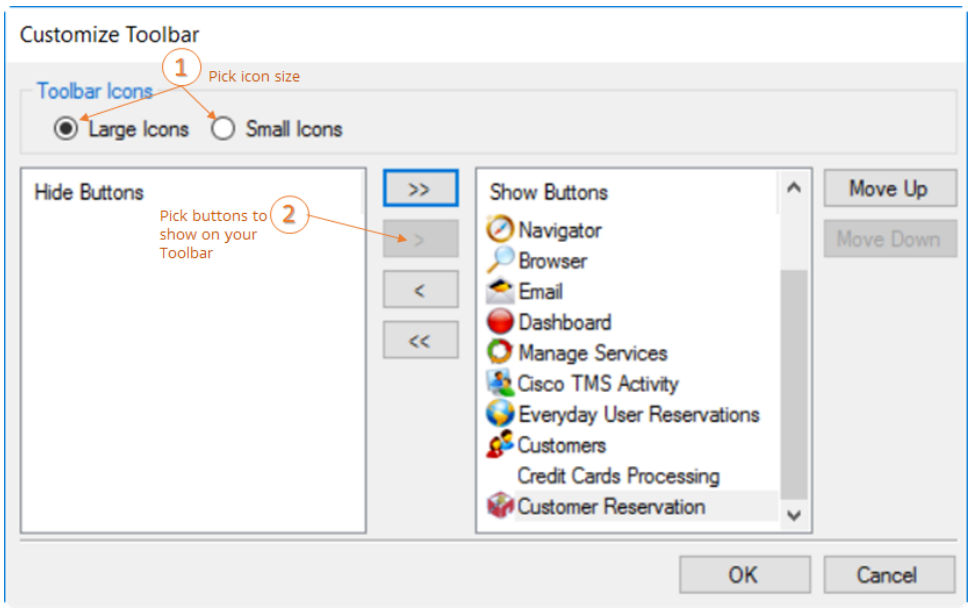
CHAPTER 183: Customize Your Toolbar

To customize your EMS Desktop Client toolbar, follow these steps:

1. Right-click the toolbar and click **Customize**.



The Customize Toolbar dialog box opens.



2. Customize your icons as follows:
   - To display the toolbar icons as large icons, select **Large Icons**.
   - To display the toolbar icons as small icons, select **Small Icons**.
   - To add or remove icons from the toolbar display, select the icons (CTRL+click to pick more than one at a time) and then use the arrow buttons in the middle, or double-click them, to move them between the Hide or Show panels.
   - To change the order (from left to right) in which the icons are displayed on the toolbar, click **Move Up** or **Move Down**.

3. Click **OK** to save your changes and update the toolbar, or click **Cancel** to exit without saving your changes.

CHAPTER 184: Using the Reservation Book

The Reservation Book provides a view of all the confirmed reservations (the reserved time as well as the room for which the reservation is scheduled) for your organization. (Canceled bookings are not shown.) You use the Reservation Book to 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 it better suits your working needs.

Concept: Space is Hierarchical in EMS

In EMS, your organization's office is made up of locations, spaces, and users.

Locations

A physical area representing multiple spaces. Depending on how large your company is, it could be anything from "West Coast HQ" to a campus-level "Mail Room 6". and can contain multiple rooms, buildings, and other spaces.

Areas

Similar to locations, and area can also include multiple locations, and helps you group locations, buildings, and rooms by your own organization's

Buildings

A physical building containing rooms, with pre-defined equipment and service options. Buildings belong to Locations.

Rooms

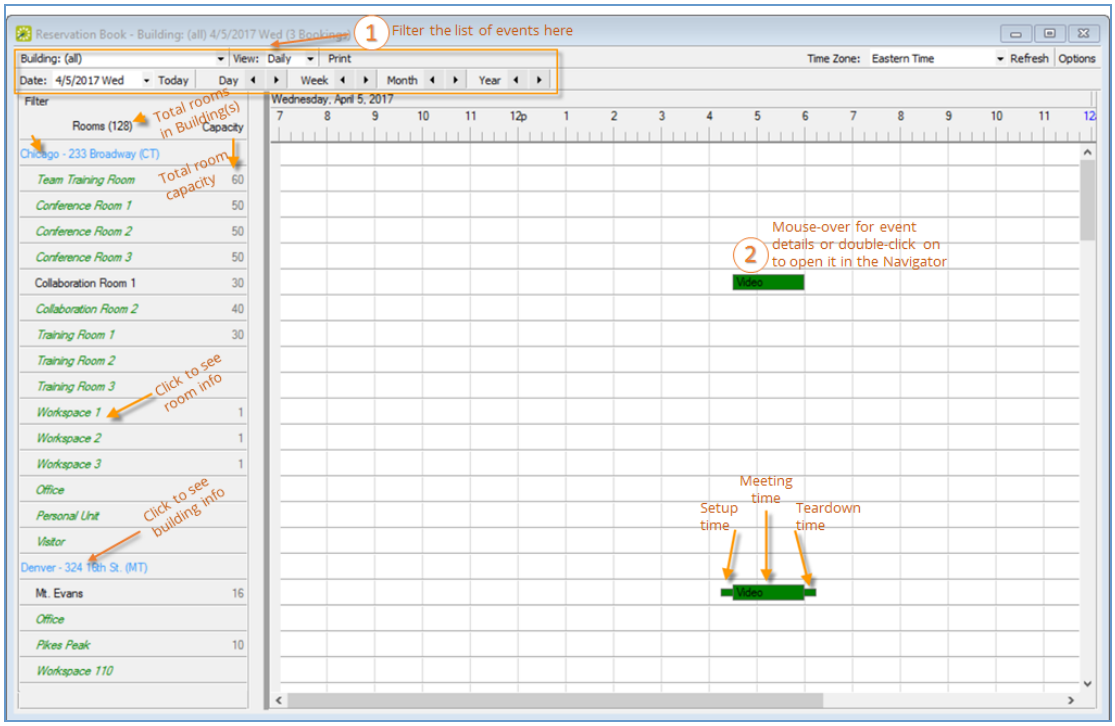
Rooms with pre-defined equipment and service options. Rooms belong to a Building. You can think of the hierarchy like this: Your Company > New York HQ > Client Consultation Area > Central Park Building > Nicest Conference Room

Users

When you add users in EMS, how you define their user profiles and booking templates control whether they will be able to schedule events in the rooms you've configured.

Open the Reservation Book

To open the Reservation Book, on the EMS toolbar, click the Book icon; a window opens where you can see all confirmed reservations for today. You can set Filters along the top, such as Building, View, and Date to change the events listed, and you can change the time zone displayed. All today's reservations that meet the filtering criteria are displayed in the book in the Daily view. You might have to scroll up and down to see all reservations.



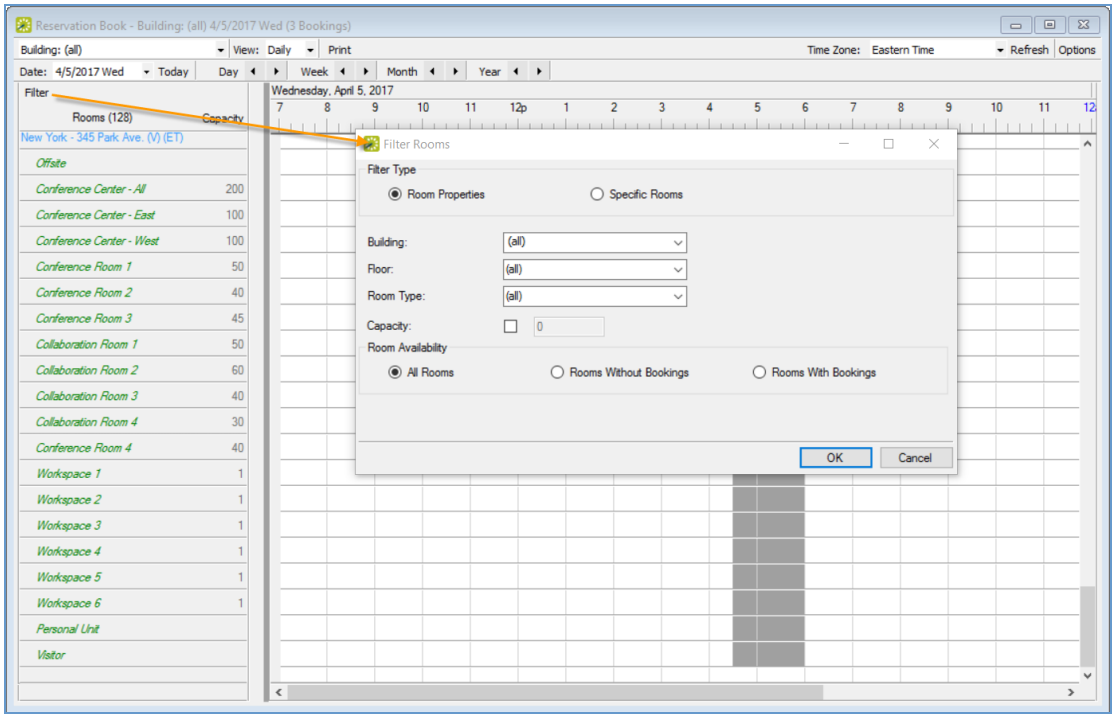
Note:

You can only make a new reservation from here in the **Daily View**. You might also be able to Check In to events from here. You can customize the information that shows when you mouse over an event.

Filter Rooms

You can filter the Reservation Book to only show certain Rooms.

1. Click **Filter**. The **Filter Rooms** dialog box opens.



- If you click Room Properties, you can filter by Building, Floor, Room Type, Capacity, and Room Availability.
- If you click Specific Room, you can filter the list to only show events in specific rooms.

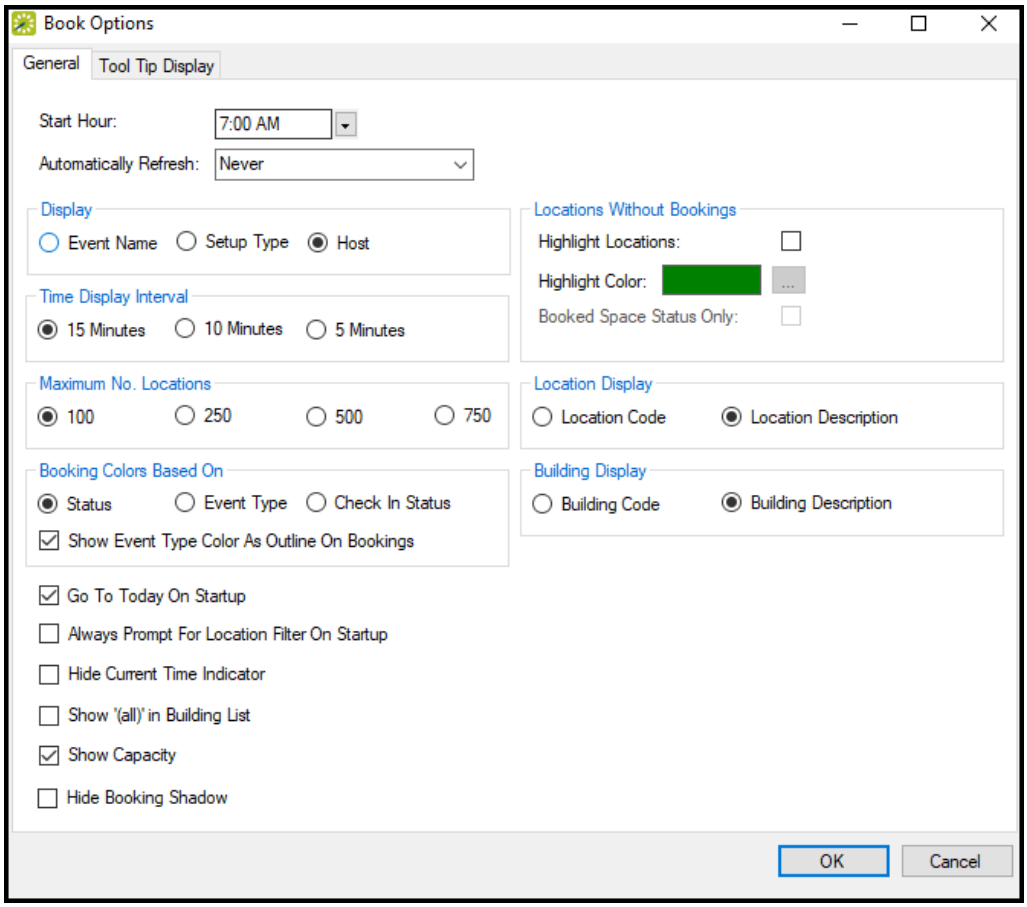
2. Click **OK** to close the popup and update in the Reservation Book.

> **Note:**
> Click **Reset** at the top of the Rooms list to reset filters back to defaults.

Customize Your Reservation Book Display

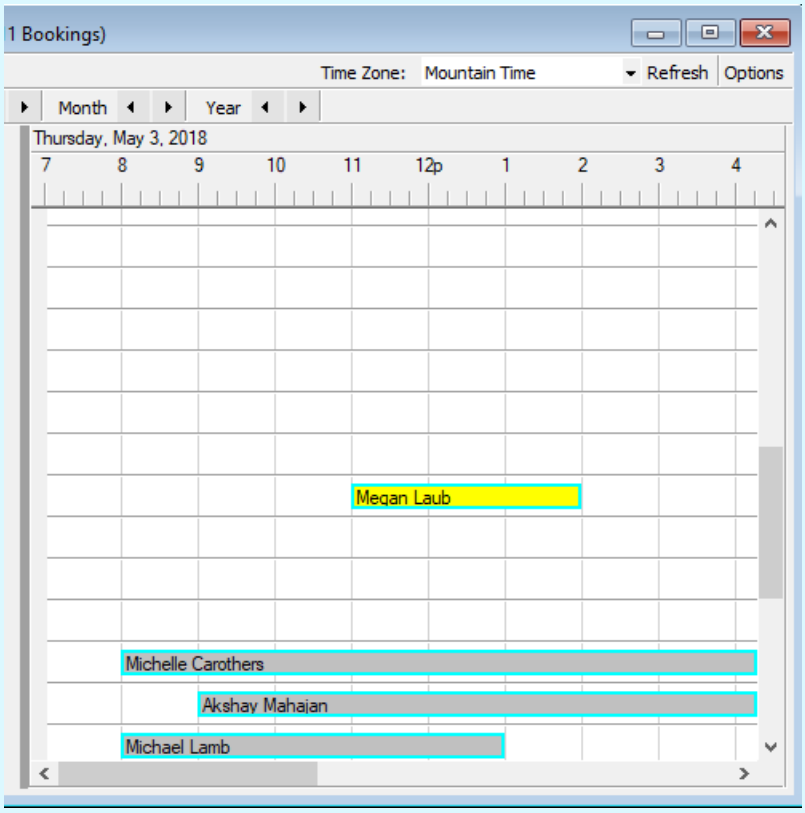
Click Options (upper right) to open the Book Options dialog box where you can customize the display of the book and reservations in it.

> **Note:**
> As of Update 22, you can simultaneously view event type color and status color from the Reservation Book. See Also: Book Option Fields below.



Book Option Fields

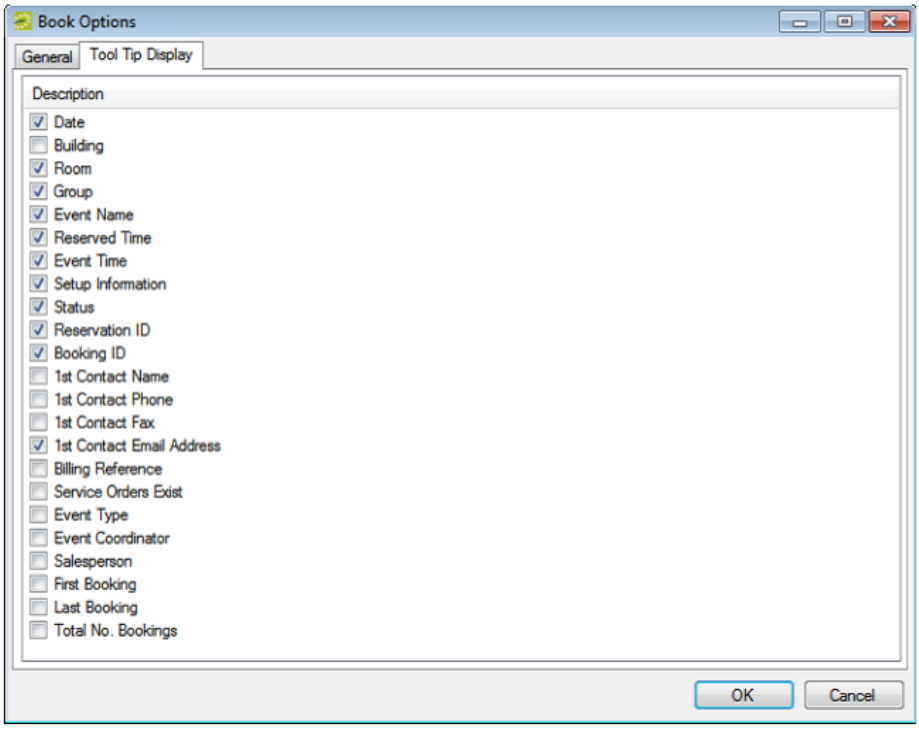
Option	Description
Start Hour	The daily start time for the Reservation Book display.
Automatically Refresh	The time interval at which the Reservation Book display is automatically refreshed.
Display	The information that is displayed in the middle bar for a reservation.
Time Display Interval	Changes the granularity of the time display interval.
Maximum No. of Rooms	The maximum number of rooms to display in the Reservation Book.
Booking Colors Based	The color of the bookings in the reservation. Select one: **Status**, **Event Type**, or **Check-in Status** (for EMS Workplace only.)

Option	Description
On	**Show Event Type Color As Outline on Bookings**: Check this box to simultaneously view Status and Event Type on the Reservation Book. For example, in the image below, the event type is yellow and the status is blue. 
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.
Always	If Show '(all)' in Building List is also selected, then when you open the Reservation

Option	Description
Prompt for Room Filter on Startup	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.
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 drop-down 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 drop-down 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.
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.

Customize Event Information on Mouseover

In the Book Options dialog box, click the Tooltip Display tab to select which items to include in the tooltip that opens when you mouseover an event in the Reservation Book.



CHAPTER 185: Create a Booking in the Reservation Book

To begin, locate and select the room you want to book in the Reservation Book (Daily display). To the right of the room in the time grid, click and drag your mouse to select a start time and end time. The Reservation Wizard launches.

You use the Reservation Wizard to check for available space for an event and to make a reservation for the event.

Concept: Reservations are containers for multiple bookings; bookings are individual meetings .

When you "make a reservation" in EMS, you are creating the broader rules for events that take place with a similar purpose and involving most of the same people, services, resources, and spaces. When you "book" a meeting, you are creating a meeting within a reservation. See Also: Reservation Structure.

The Reservation Wizard helps you 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 will:

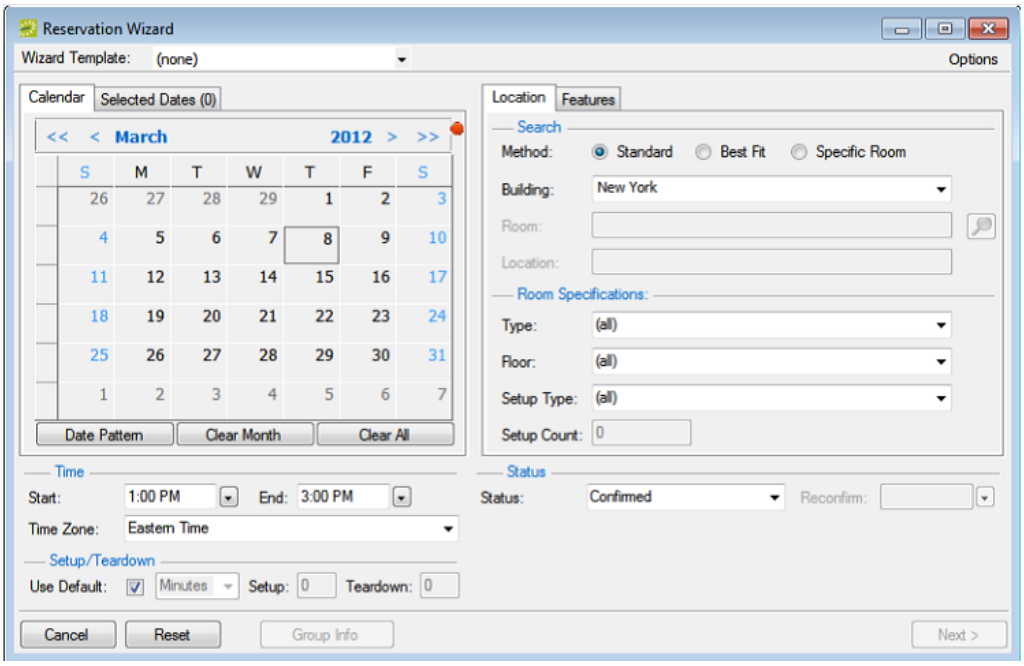
- Set the event date, time, and status
- Set the event location
- Specify the event information

The following procedure describes how to make a reservation by selecting values for the required and optional fields.

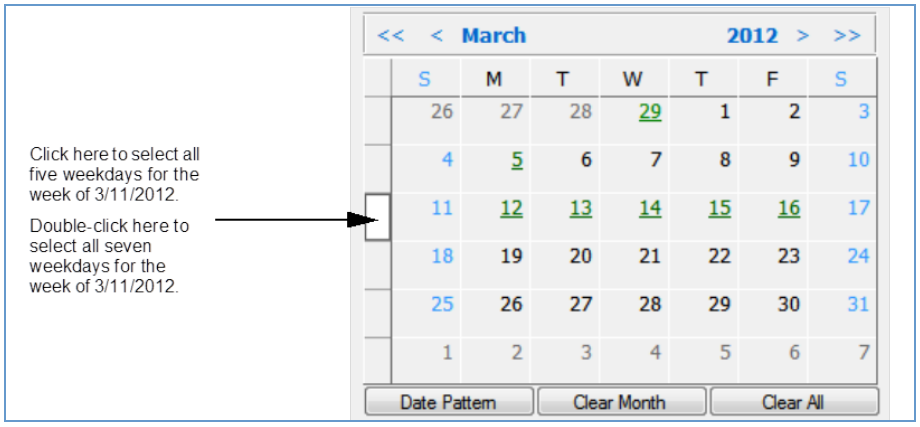
- If your EMS administrator has configured reservation wizard templates, then a Reservation Wizard Template drop-down list is displayed at the top of the Reservation Wizard. You can streamline the booking process by choosing from these templates, which automatically sets the default values for many of 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 Also: Setting User Preferences and Default Values.

Setting the Event Date and Time

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.



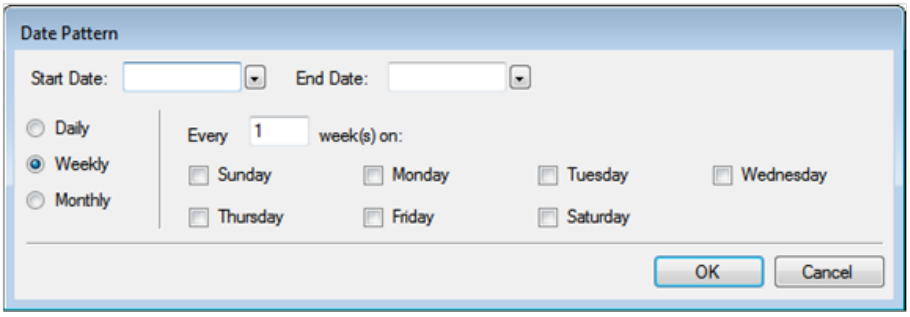
2. If needed, use the scroll features on the top of the Calendar to open the calendar for a different month (< or >) or for a different year (<< or >>). You can also click a month at the top of the calendar to open a drop-down list from which you can select a different month and you can also click a year at the top of the calendar to open a drop-down list from which you can select a different year.
    - If the event dates do not follow a pattern, use one or more of the following options for entering a date; otherwise, go to the next step. Click to pick dates on the calendar. To select all five days in a work week, click in the blank space to the left of the week. To select all seven days in a week, double-click in the blank space to the left 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 shown (regardless if the day falls within the same

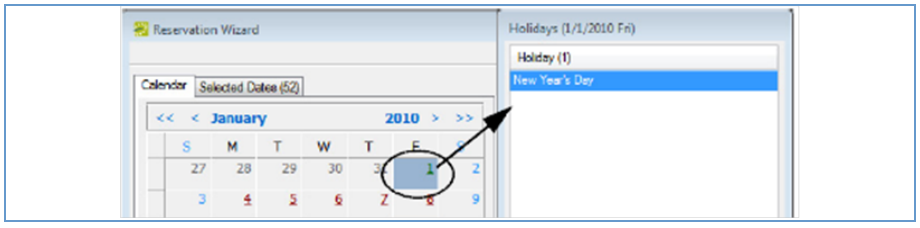
month), double-click the heading (S, M, T, and so on) for the day. If you need to clear a single selected date, click the date again. To clear multiple selected dates in a single step, click Clear Month to clear all currently selected dates for the currently displayed month or click Clear All to clear all currently selected dates regardless of month or year.

- If the event dates do follow a recurrent 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. The steps that you use to create a date pattern in EMS are very similar to the steps that you use to create a date pattern in Microsoft Outlook or in any other calendaring product.



As you specify the event dates, the Selected Dates tab is automatically updated with the selected dates. Dates that are closed are displayed in red on the Calendar tab, holidays are green. These are linked to information about the closure (in the Selected Dates tab, click Holidays). To remove the date your selection, 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.

Viewing information about a holiday or closed date from the Calendar tab



3. Specify the start time and end time for the event:
   - Select a time from the drop-down list for each field.
   - Manually enter the time in each field. When you manually enter the time, you can use a short-cut. 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.

4. Specify 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.
5. 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 Also: EMS Dashboard.

Setting the Event Location

You have three options for selecting the event location on the first window of the Reservation Wizard:

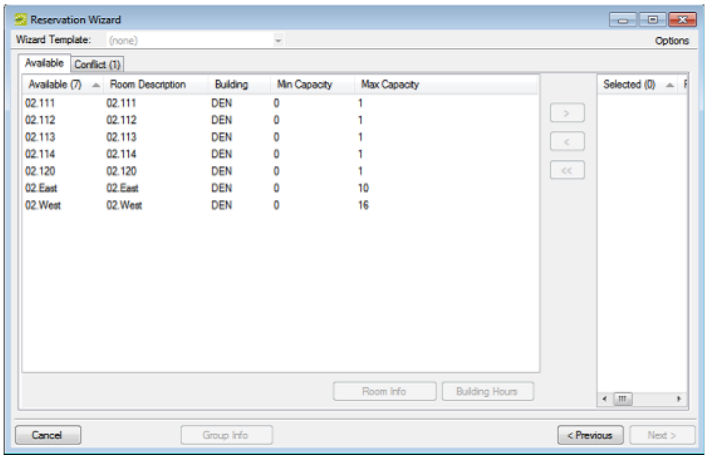
Search Method	Description
Standard	Use this option to display a list of all the available rooms that meet all the requested dates. **Note:** Standard search is required for Video Conference room assignments.
Best Fit	Use this option if no one room can meet all the requested dates. The system lists the 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.
Specific Room	Use this option to confirm the availability and reserve of one specific room for the scheduled event.

Note:
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.

Finding 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. Your selection on the Building drop-down list determines the options that are available on the Time Zone drop-down 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.
3. If applicable, select the appropriate time zone for the event.
4. Specify one or more room settings:
   - 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 drop-down 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 drop-down 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 drop-down 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.
5. You can add optional Features on the Features tab.
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.



Example of standard room search results

7. Select the room, or CTRL-click to select the multiple rooms 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.

Note:
If you select more than one room, all the selected rooms are booked for all the event dates.

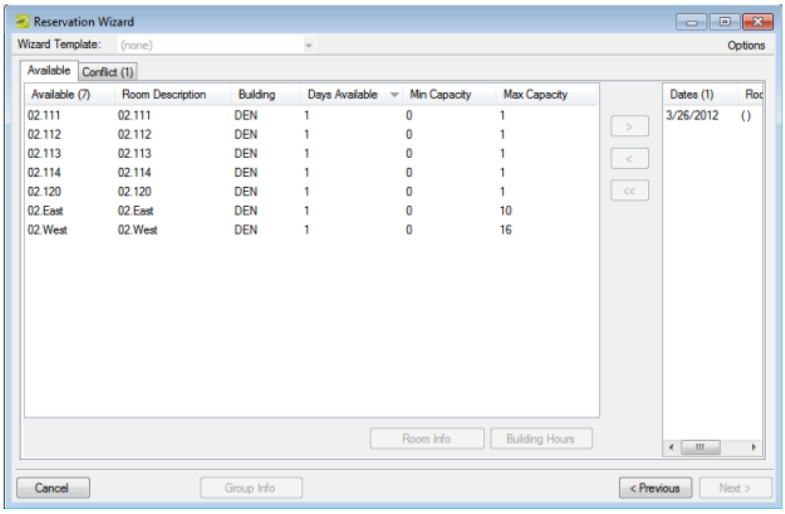
10. Click Next.

Finding 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.

> **Note:**
> Your selection on the Building drop-down list determines the options that are available on the Time Zone drop-down 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 drop-down 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 drop-down 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 drop-down 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 edit the reservation later.
5. You can add optional Features for the room on the Features tab.
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.



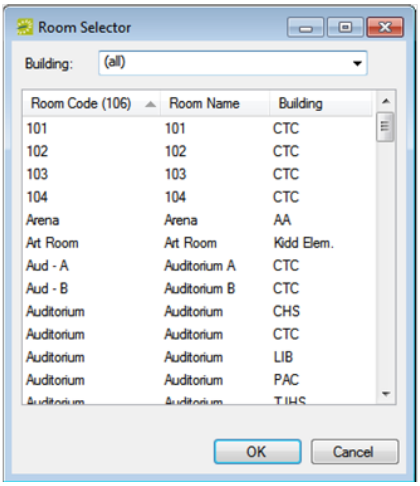
Example of best fit room search results

7. Optionally, do one or both of the following; otherwise, go to the next step.
   - To see detailed room information, click Room Info (such as the room properties, pricing, and/or to view an image of the room).
   - To see building hours, click Building Hours (which shows hours when the selected room/building is open on the reserved date).
8. If a room 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 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.

Finding 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.

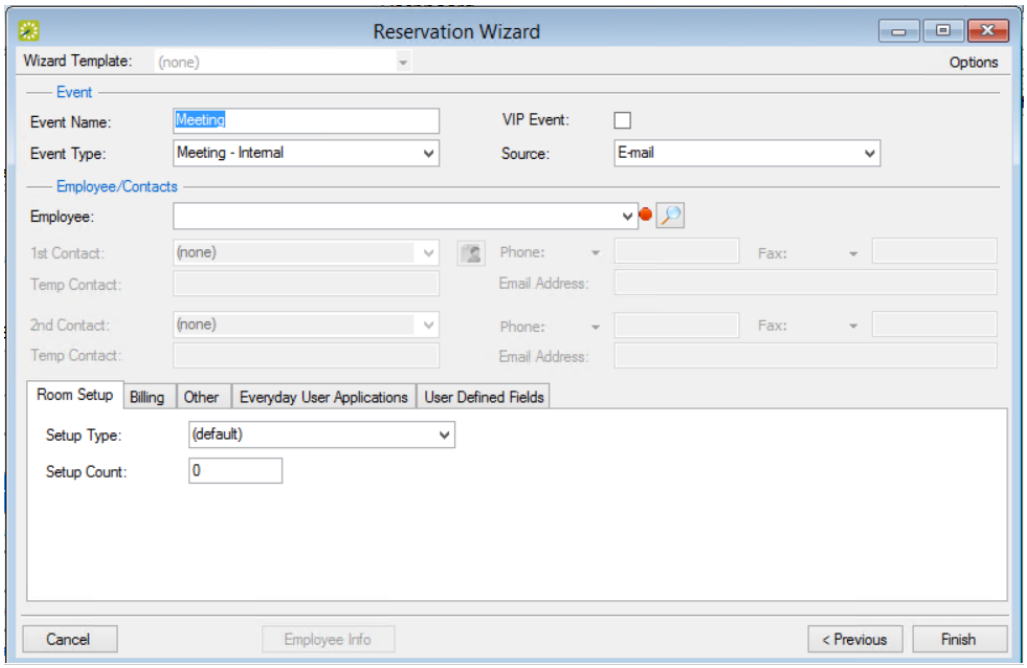
1. Select Specific Room. The Room Selector dialog box opens.



2. To choose a room from list of all rooms in all available buildings, select (all) on the Building drop-down list; then select a room, and then click OK. To select a room in a specific building, area, or view, select it on the Building drop-down list, select the room, and then click OK. If the room is configured as an override room, go to the next step, otherwise, go skip to Step 4.
3. In the Location field, enter the location of the override room, and then click Next skip the remaining steps in this subsection.
4. Click Next. If the event is scheduled for a single date and the room is available, then continue. 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. 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, do one or both of the following; otherwise, go to the next step.
   - To see detailed room information, click Room Info (such as the room properties, pricing, and/or to view an image of the room).
   - To see building hours, click Building Hours (which shows hours when the selected room/building is open on the reserved date).
6. 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.

Specify 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.



1. Enter event information using the elements in this window (see also: Reservation Wizard Fields).
2. 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.

Note:

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.

CHAPTER 186: View and Edit 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. (Canceled 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.

This section will provide information on the following topics:

- Open the Reservation Book
- Change the Reservation Book Display
- View Reservation Information
- Make a New Reservation
- Edit an Existing Reservation

Open the Reservation Book

1. Open EMS Desktop Client.
2. From 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.

   Note:
   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.

   - 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
   - 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.

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:

1. A left bar that indicates the setup time
2. A middle bar that indicates, by default, the event name
3. A right bar that indicates the teardown time

Change the Reservation Book Display

1. On the EMS Web Client toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. You can change the Reservation Book display in the following ways:
   - Change the **list of rooms** that are displayed in the Reservation Book based on **room properties**.
   - Change the **list of rooms** that are displayed in the Reservation Book based on a **specific room (s)**.
   - Change the **Reservation Book view**.
   - Change multiple **display options** for a reservation.
   - Select which items to include in the **tooltip** that opens when you place the cursor over an event in the Reservation Book.
   - Change the display date using the **calendar**.
   - Change the display date using the Reservation Book **scroll features**.
3. To change the list of rooms based on room properties:
   a. Click **Filter** if the Filter dialog box is not already open.
   b. Select Room Properties and customize one or more of the following:

- Leave the Building drop-down 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.

4. Click **OK**. The Filter Rooms dialog box closes. The room display in the Reservation Book is changed accordingly.
5. To change the list of rooms that are displayed in the Reservation Book based on a specific room or rooms:
    a. 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.
    b. Select the room, or CTRL-click to select multiple rooms on the Available list.
    c. 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
6. To change the Reservation Book view, select Daily, Weekly, or Monthly from the View drop-down list.
7. To change multiple **display options** for a reservation:
    a. Click **Options** (upper right hand corner of Reservation Book) to open the Book Options dialog box (the General tab is the active tab).
    b. Change multiple display options not only for the Reservation Book, but also a reservation in the book.

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.

Option	Description
Maximum Number 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.
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 drop-down 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

Option	Description
	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 drop-down 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.

8. To select which items to include in the **tooltip** that opens when you place the cursor over an event in the Reservation Book:
    a. Click **Options** (upper right hand corner of Reservation Book) to open the Book Options dialog box.
    b. 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.
9. To change the display date using the **calendar:**
    a. From the **Date** field, click the drop-down arrow to open the Calendar.
    b. Use the (< and >) scroll features at the top of the calendar to change the month or use the (>) scroll features at the top of the calendar to change the year.
    c. To select a different date for a month, click the date.
10. To change the display date using the Reservation Book **scroll features:**

a. 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.

b. To reset the display immediately to the current day's date, click **Today**.

View Reservation Information

1. On the EMS toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. To view the reservation in the Navigator, double-click the middle bar for the reservation entry or right-click the reservation entry and on the context menu that opens, click **Open**.
3. You can view the reservation information in the following ways:
   - View the **bookings** for a room
   - View the **properties** for a room
   - View the **pricing** for a booked room
   - View the **setup** information, event information, or teardown information for a reservation.
4. To view the bookings for a room:
   a. 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.
   b. To view a booking in the Navigator, select the booking, and then click Open.
5. To view room properties:
   a. Click the **room name** or **code** in the Rooms list to open the Bookings tab for the Room Info dialog box.
   b. 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, etc. It also lists the setup type and capacity for the room, and any notes that have been entered for the room.
6. To view the pricing for a booked room:
   a. Click the **room name** or **code** in the Rooms list to open the Bookings tab for the Room Info dialog box.
   b. Open the **Pricing** tab. This tab displays any pricing information that was defined for the room.
7. To view the **room setup** information, event information, or teardown information for a reservation:
   a. 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.
   b. 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.

Make a New Reservation

1. On the EMS toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
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.
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. See Create a Reservation in the Reservation Wizard.

Edit an Existing Reservation

1. On the EMS toolbar, click the Book icon. The Reservation Book opens in the Daily view.
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.

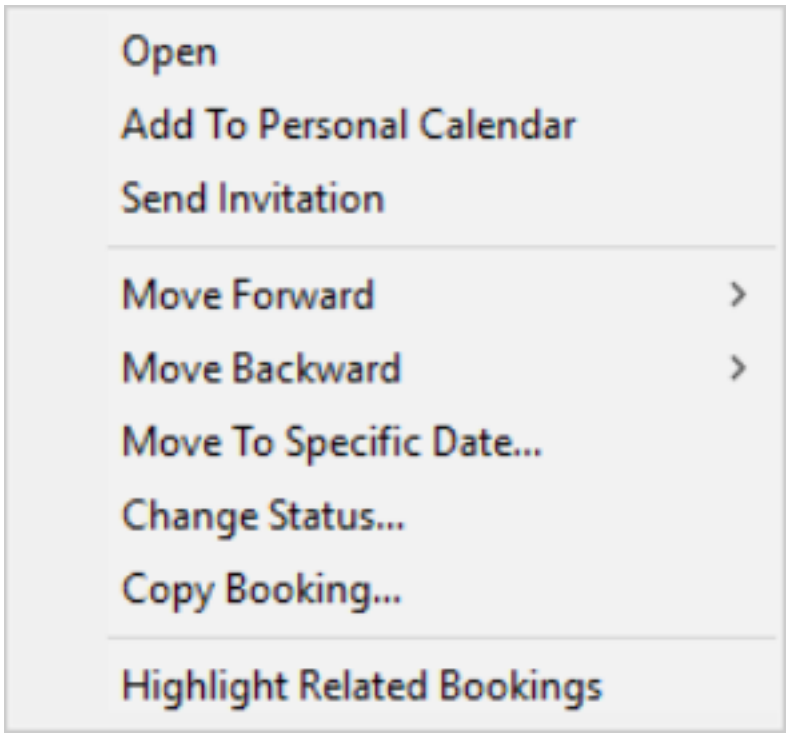
Option	Description
Move Backward	Move the reservation date backward by one day or one week.
Move to a Specific Date	Move the reservation to a specific date.
Change Status	Change the status of the reservation.
Copy Bookings	N/A **Note:** Although this option is available on the context menu for a reservation, 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.

CHAPTER 187: Edit Reservations in the Reservations Book

1. Begin by locating a booking in the Reservation Book.
2. You can do one or more of the following to edit an existing reservation:

Step	Action
Change the setup time	Drag the left bar horizontally to a new time, then click Yes.
Change the event time	Drag the middle bar horizontally to a new time, then click Yes.
Change the tear-down time	Drag the right bar horizontally to a new time, then click Yes.
Change the 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, the click Yes.

3. Right-click on a reservation in the Reservation Book to access a menu of editing options (defined below).



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 back 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.
Swap Rooms With Another Booking (EMS)	Swap the room assignments of two events (only applicable for two events that have identical meeting patterns). 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 reservation, then click Yes.

Option	Description
	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 Academic Planning)	Swaps only the two bookings selected for the indicated day. (Just like Swap Rooms With Another Booking in EMS.)
Swap Rooms With Another Course (EMS Academic Planning)	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.
Check In	Check into the booking.

CHAPTER 188: Import a List of Visitors to a Meeting

To import a list of visitors to a meeting, you will

- Ensure your list of visitors is ready for import.
- Navigate to the meeting you want to work with.
- Import your list of visitors.
- Select the meetings within the reservation to which to add your list of visitors.
- Confirm and finalize.

Important!

To utilize the Advanced Visitor Management Module, an additional license must be purchased. Without this optional module, users must add visitors manually and the "Import" and "Print Format" buttons will not be available.

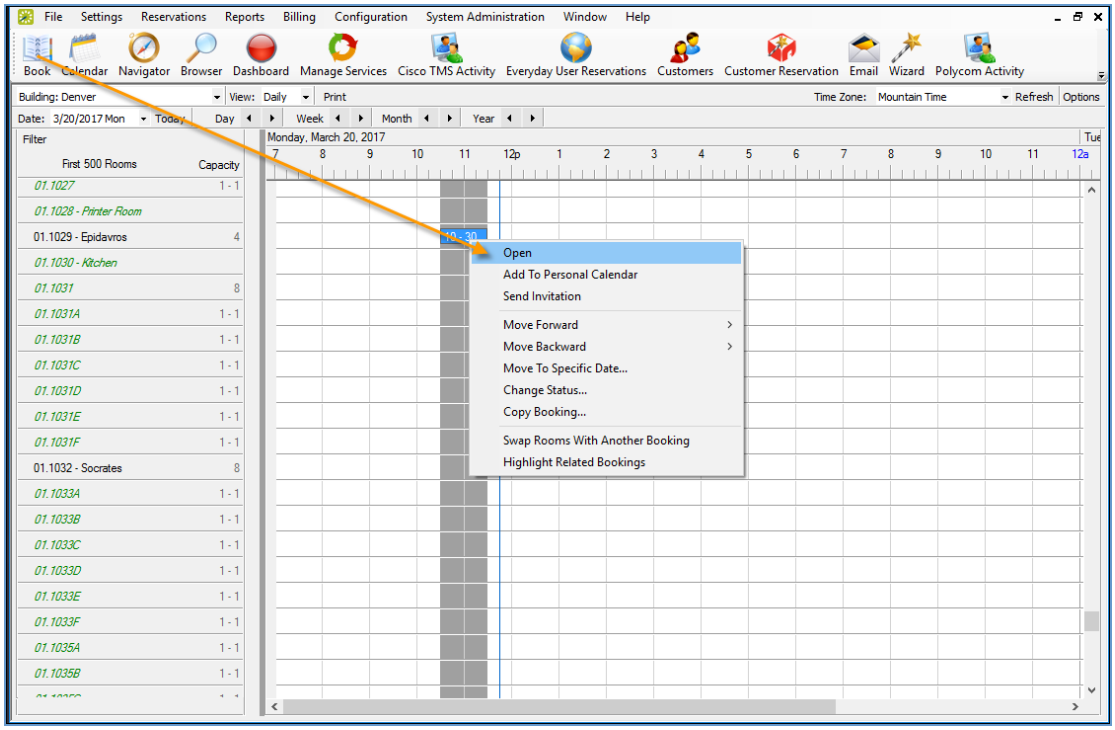
1. Your list of visitors must be a tab-delimited spreadsheet that contains the information (in the order listed) for the visitors you want to import. Each visitor must be a separate line entry.

Field	Description	Required/Optional
Visitor	True/False	
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
Name	Text. 50 characters maximum.	Required

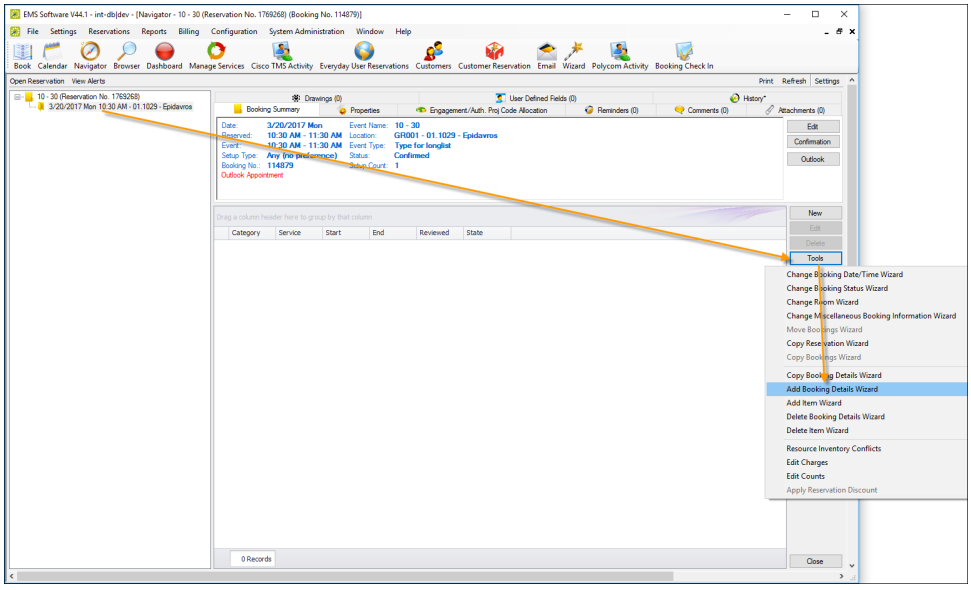
Note:

You can click **Print Format** on the second page of the Add Booking Details Wizard (described below) to see the required format for the tab-delimited file.

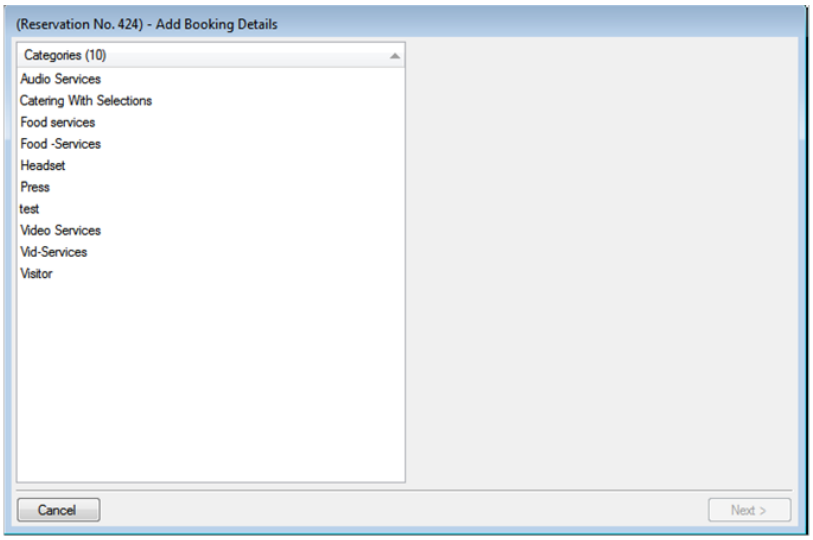
2. Open the reservation from the Reservation Book.



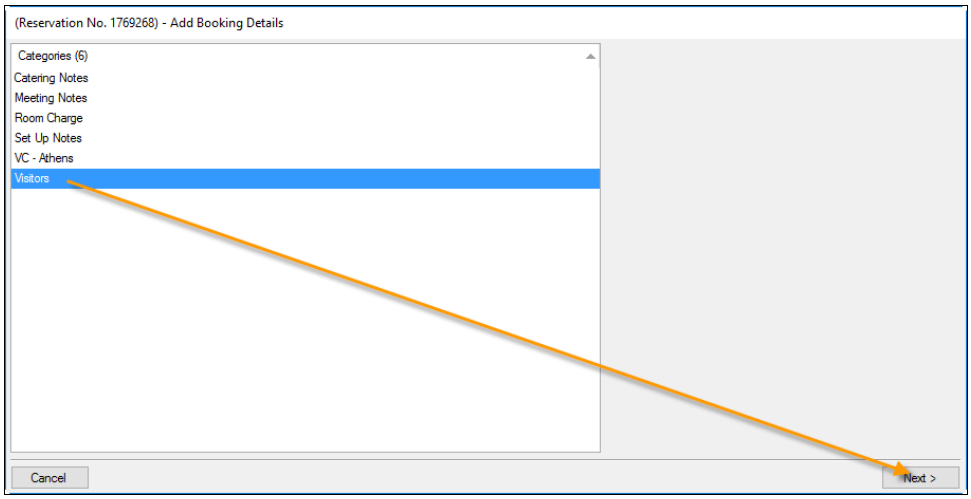
3. In the left pane of the Navigator window that opens, select the meeting for which you are importing the list of attendees/visitors, and in the Bookings pane on the right, click **Tools**, and then select **Add Booking Details Wizard**.



4. The Add Booking Details wizard opens.

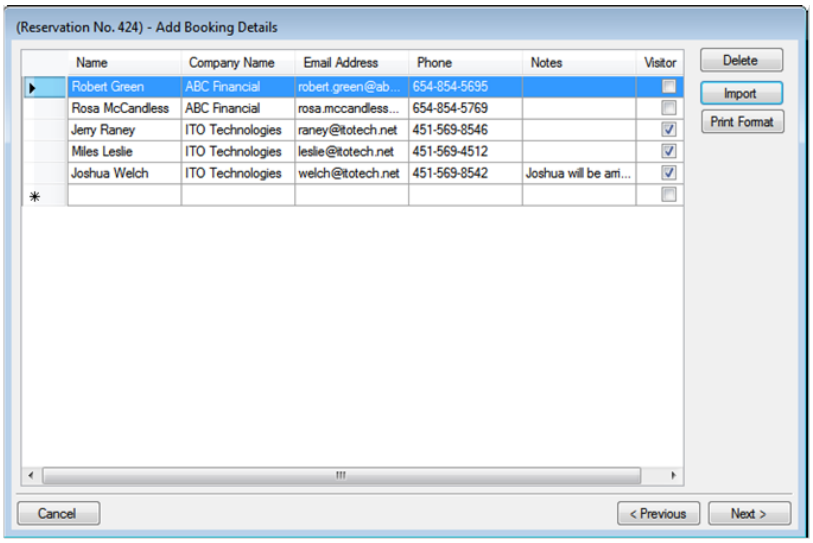


5. Select Visitors or Attendees, and then click **Next**.

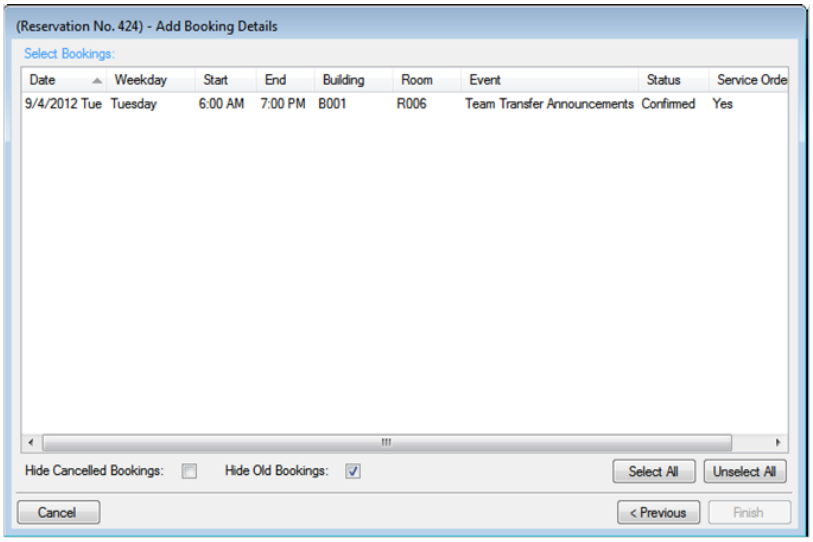


6. The second page of the Add Booking Details Wizard opens with a blank row for adding an attendee/visitor to the event.

7. Click **Import**. The Open File dialog box opens. Browse to and select your visitor list spreadsheet, and then click **Import** to import the file. The Add Booking Details Wizard is updated with the imported attendee/visitor information. Each imported visitor is a separate line entry in the Wizard.



8. Click **Next**. The Select Bookings window opens, listing all the bookings within the selected reservation with a date on or after the current day's date, *and* that do not already have the visitor list added.



> **Note:**
> To show canceled bookings, clear the Hide Canceled Bookings checkbox. To hide them, select the option. To show all bookings regardless of date, clear the Hide Old Bookings option.

9. Select the meetings to which to add your visitor list (use CTRL+click or Select All to select multiple meetings), and then click **Finish**.

A message opens asking you if you want to add more booking details.

10. Click **No**.

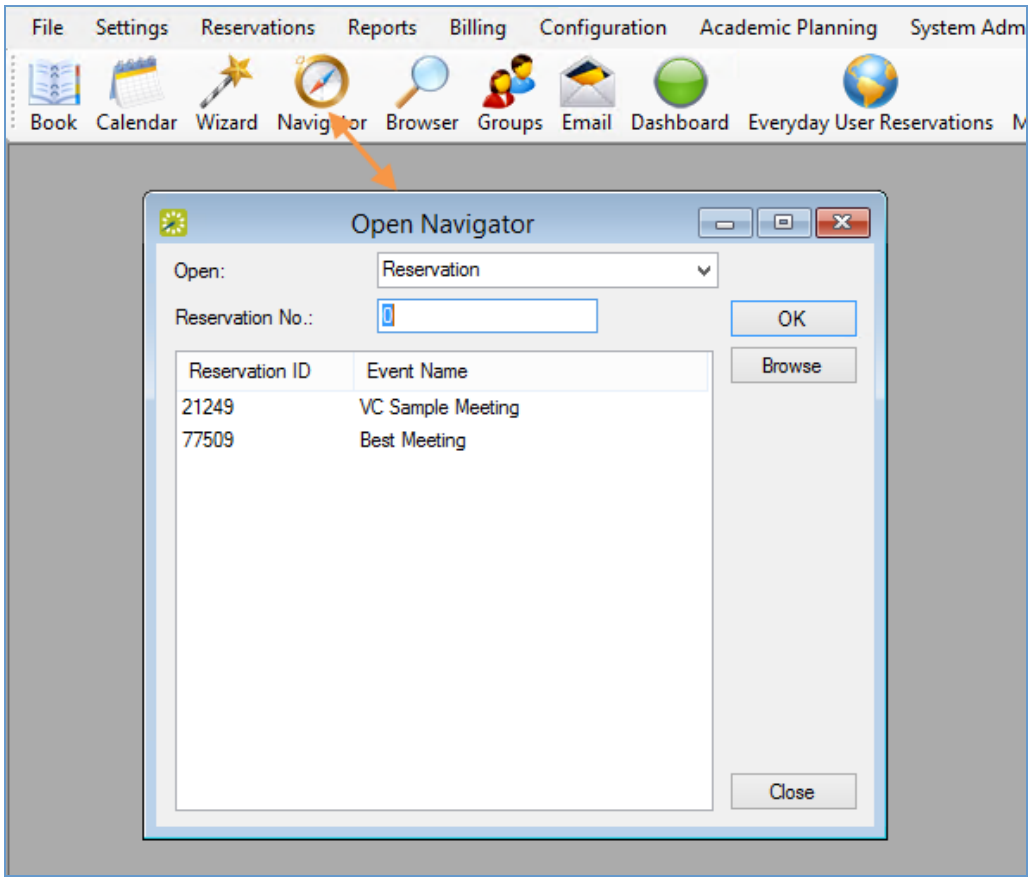
    A message opens indicating that the changes were made successfully.

11. Click **OK** to close the message and return to the Navigator.

    The booking detail (Visitors) and its items (visitors) are displayed as folders under the appropriate booking folders in the Navigator.

CHAPTER 189: The Navigator

The Navigator is the window in EMS that you use to view and manage all aspects of a reservation including bookings and booking details.



This section includes the following:

- Overview of the Navigator
- Get Familiar with the Navigator
- Edit a Reservation in the Navigator
- Add Bookings to a Reservation in the Navigator
- Copy a Reservation in the Navigator
- Change the Status of a Reservation in the Navigator
- Reprice Categories and Room Charges for a Reservation in the Navigator
- Apply a Reservation Discount
- Edit a Booking in the Navigator
- Edit Multiple Bookings in the Navigator

- Move Bookings to a Different Reservation in the Navigator
- Copy Multiple Bookings in the Navigator
- Booking Details and Items Overview
  - Add Booking Details and Items to Individual Bookings
  - Add Booking Details and Items to Multiple Bookings
  - Edit Booking Detail Items for Individual Bookings
  - Copy Booking Details Between Bookings
  - Delete Booking Detail Items from Multiple Bookings
  - Edit Charges for Multiple Billable Item
  - Edit Count Information for a Booking in the Navigator
  - Add Booking Details Wizard
  - Copy Booking Details Wizard
  - Delete Booking Details Wizard
  - Delete Item Wizard
  - Add Item Wizard
- Comments and Reminders in the Navigator
  - Add Multiple Comments and Reminders to a Reservation
- User-Defined Fields in the Navigator
- Attachments in the Navigator
- Drawings in the Navigator
- Resource Utility Conflicts Tool
- Approve or Deny Reservation Requests

CHAPTER 190: 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.

This topic provides information on the following:

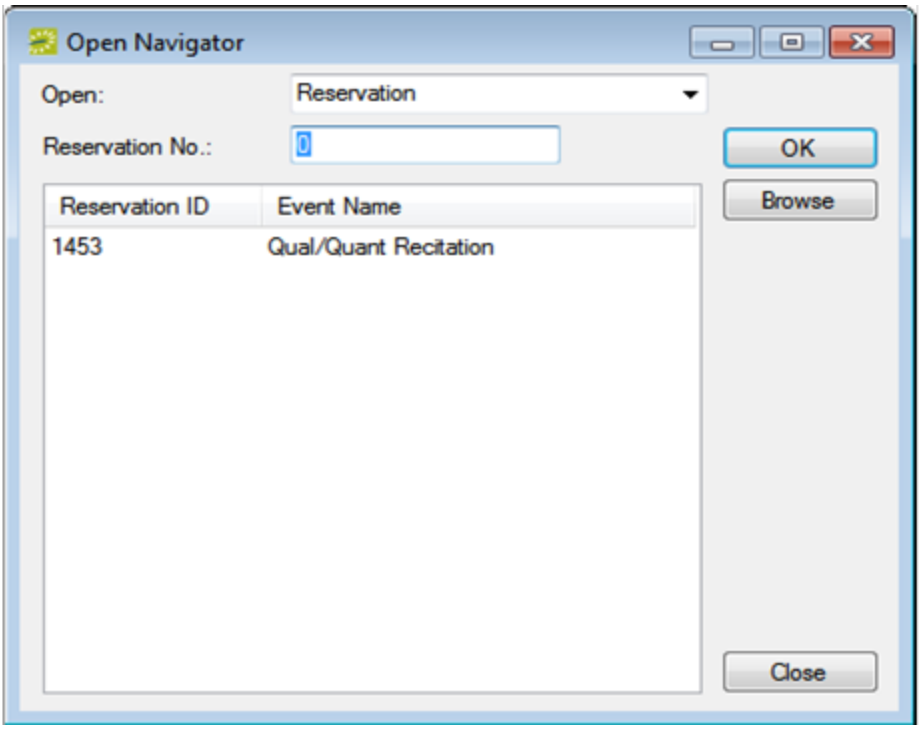
- Open a Reservation in the Navigator
- Open a Reservation through the Reservation Book
- Open a Reservation through a Group
- Open a Reservation through a Search
- Layout and Folder Structure
  - Reservation Folder
    - Allocate Charges to Multiple Billing Reference Numbers and/or PO Numbers
  - Booking Folder
  - Booking Detail Folder
- Navigator Commands
  - Navigator Options Dialog Box
    - General Tab
    - At a Glance Tab
    - Highlight Categories Tab
  - Other Navigator Commands

Open 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 steps below.
- Opening a reservation through the Reservation Book. See Also: Open a reservation through the Reservation Book.
- Opening a reservation through a group. See Also: Open a reservation through a group.
- Opening a reservation through a search. See Also: Open a reservation through a search.

1. On the toolbar, click the Navigator icon to open the Open Navigator dialog box.



2. On the Open drop-down 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**.

Note:
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.

Open a Reservation through the Reservation Book

On the 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 Also: View and Edit Reservations in the Reservation Book.

Open 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 Also: Reservations for a Group.

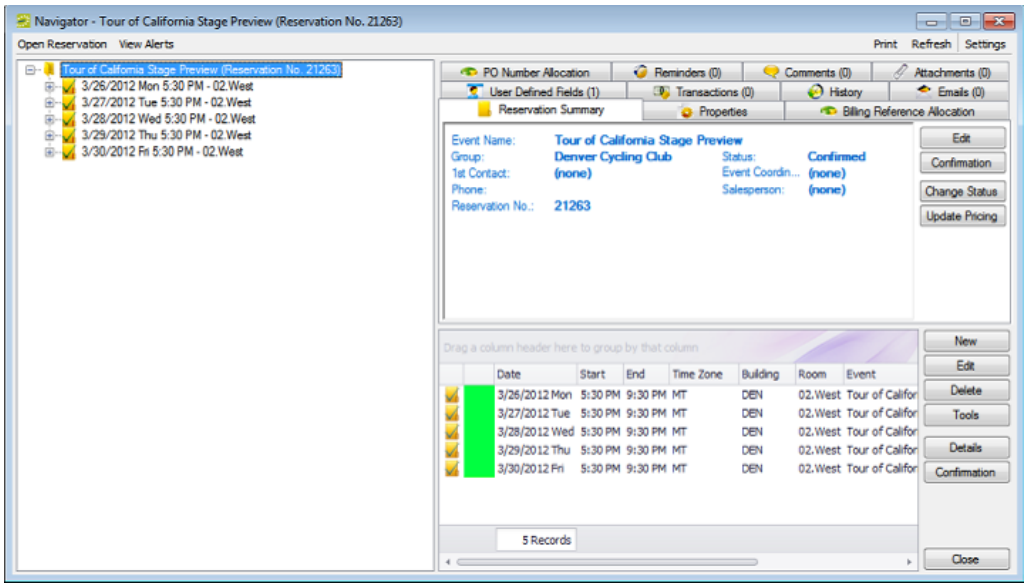
Open a Reservation through a Search

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.

> **Note:**
> 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: 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 Also: Getting Started with EMS), and it also displays different information and options depending on the folder or item that is selected in the left pane.



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 Also: Allocating charges to multiple billing reference numbers and/or PO numbers.

> **Note:**
> Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See Also: EMS System Parameters.

- **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 Also: Allocating Charges to Multiple Billing Reference Numbers and/or PO Numbers.

> **Note:**
> Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See Also: EMS System Parameters.

- **Reminders tab**—The Reminders tab displays any reminders that were created for the selected reservation. See Also: Comments and Reminders in the Navigator.
- **Comments**—The Comments tab displays any text entries that were made for the selected reservation. See Also: Comments and Reminders in the Navigator.
- **Attachments tab**—The Attachments tab displays any attachments (files) that have been saved with the reservation. See Also: Attachments in the Navigator.
- **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 Also: User Defined Fields in the Navigator.
- **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, 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 Also: Sending Email from EMS.

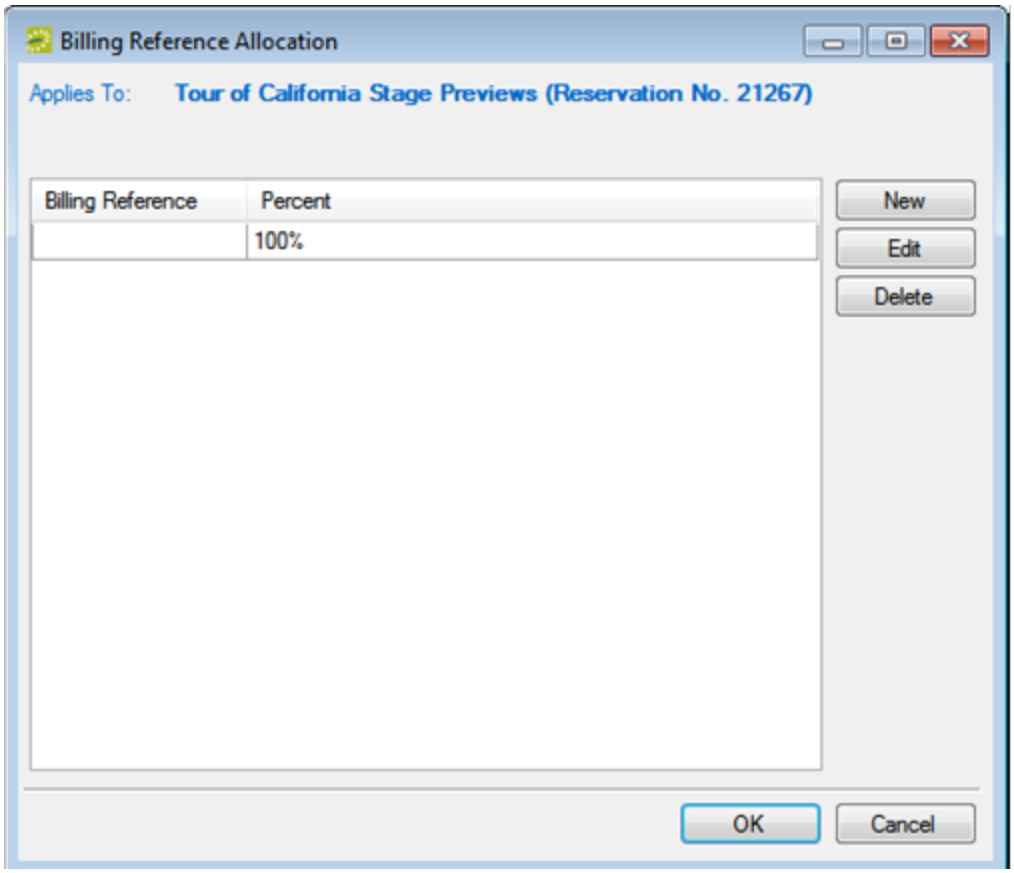
Also, when you select a reservation folder:

- 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 Also: EMS Browser Window.
- 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.

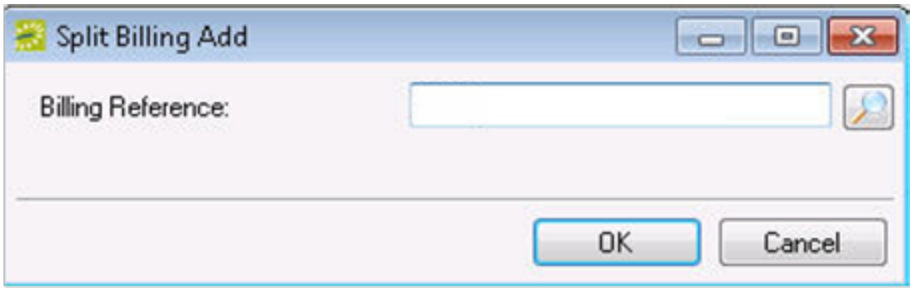
Allocate Charges to Multiple Billing Reference Numbers and/or PO Numbers

Note:
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.



2. Select the billing reference number placeholder, and then click Edit. The Split Billing Add dialog box opens.

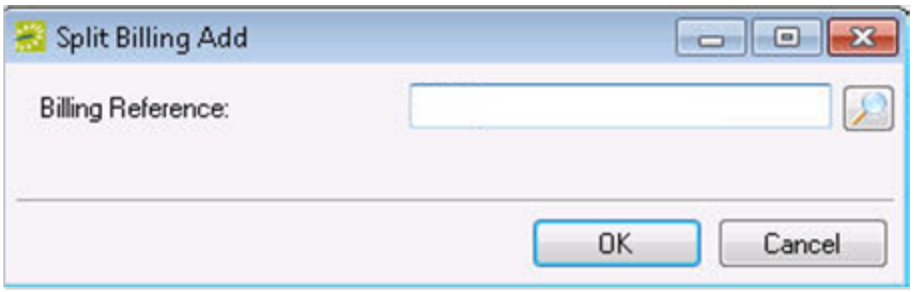


3. Do one of the following:
   - Enter the billing reference number to which you are allocating the reservation charges, and then click OK. The Split Billing Add dialog box closes. You return to the Billing Reference Allocation dialog box with the newly added billing reference number allocated at 100%. 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.
- 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.

Note:
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.

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.
6. Click New. The Split Billing Add dialog box opens.



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.

> **Note:**
> 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.

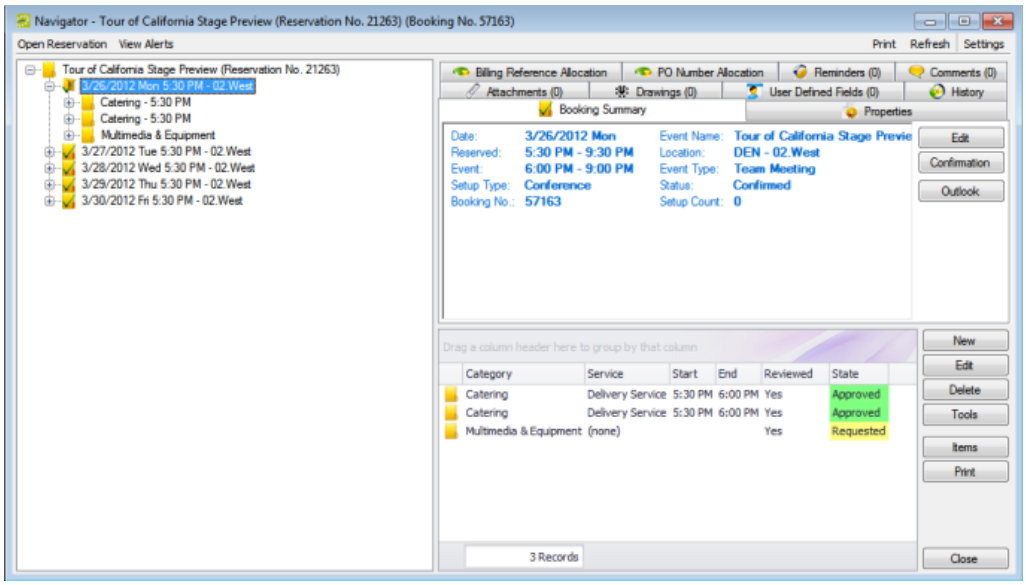
8. Repeat Step 6 and Step 7 until you have added all the needed billing reference numbers.
9. For each new billing reference number, double-click in the Percent field to select the percent, and then change the percent to the appropriate value.

> **Note:**
> 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.



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 Also: Allocating charges to multiple billing reference numbers and/or PO numbers.

> **Note:**
> Your EMS administrator must enable the Use Billing Reference Allocation parameter for this tab to be displayed. See Also: EMS System Parameters.

- **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 Also: Allocating Charges to Multiple Billing Reference Numbers and/or PO numbers.

> **Note:**
> Your EMS administrator must enable the Use PO Number Allocation parameter for this tab to be displayed. See Also: EMS System Parameters.

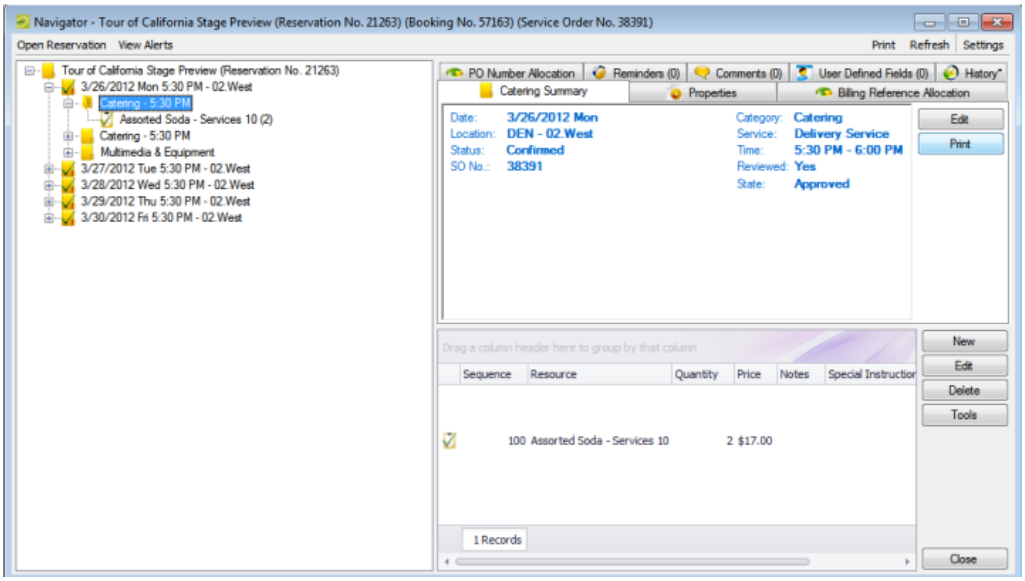
- **Reminders tab**—The Reminders tab displays any reminders that were created for the selected booking. See Also: Comments and Reminders in the Navigator.
- **Attachments**—The Attachments tab displays any attachments that were saved with the booking. See Also: Attachments in the Navigator.
- **Comments**—The Comments tab displays any comments that were made for the selected booking. See Also: Comments and Reminders in the Navigator.
- **Drawings**—The Drawings tab displays a list of files that were attached to the selected booking. See Also: Drawings in the Navigator.

- **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.

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.



> **Note:**
> Booking detail folders and booking detail items are discussed in Booking Details and Items Overview.

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.
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. • Printing the Setup Worksheet for Reservation report, the Service Orders report, and the Banquet Event Order report. See Reports and Queries. • Printing the Transaction report. See Generating an EMS Billing Report. • 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.
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. • 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 Also: Confirmations.

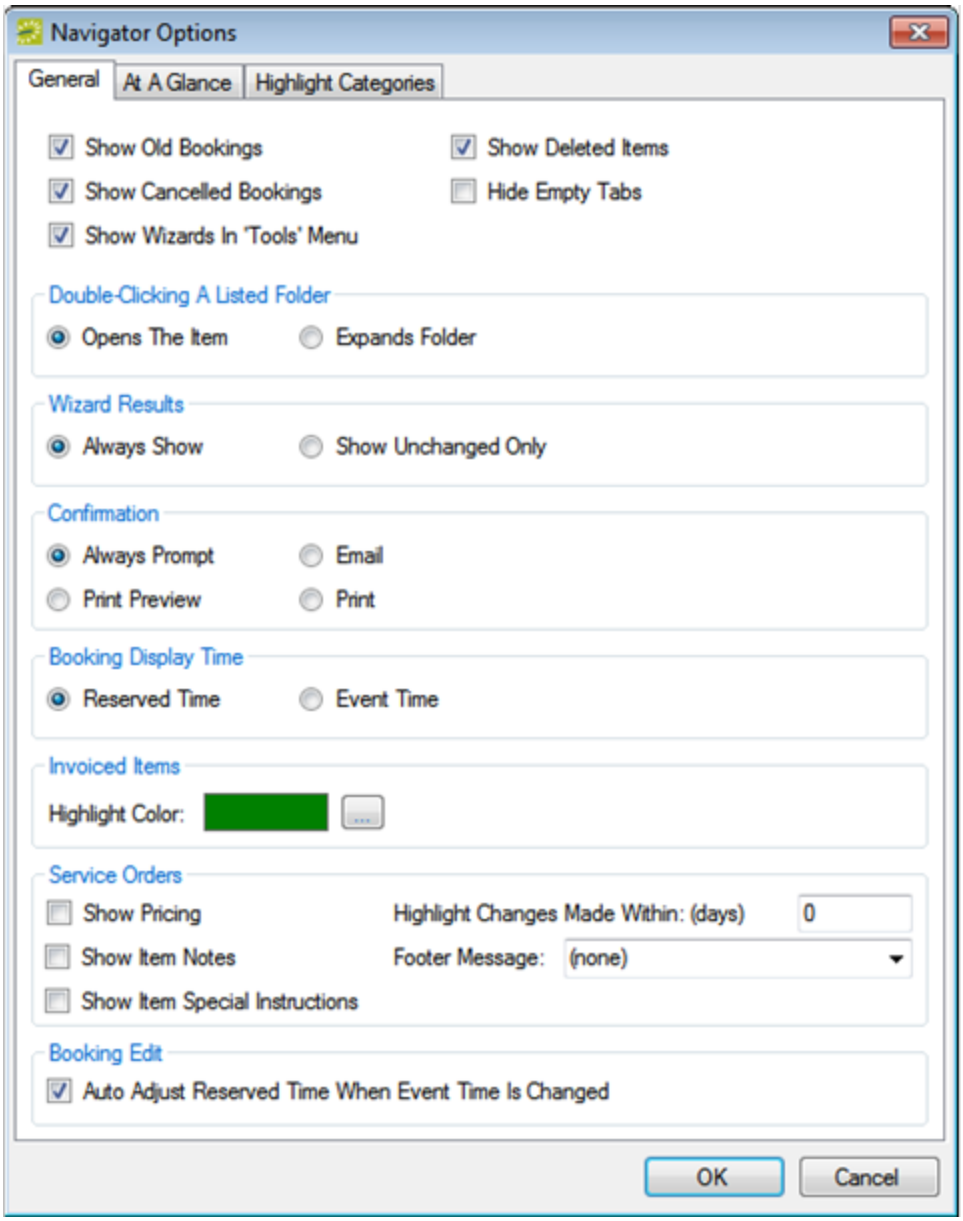
All other navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator.

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.



Navigator Options dialog box, General tab

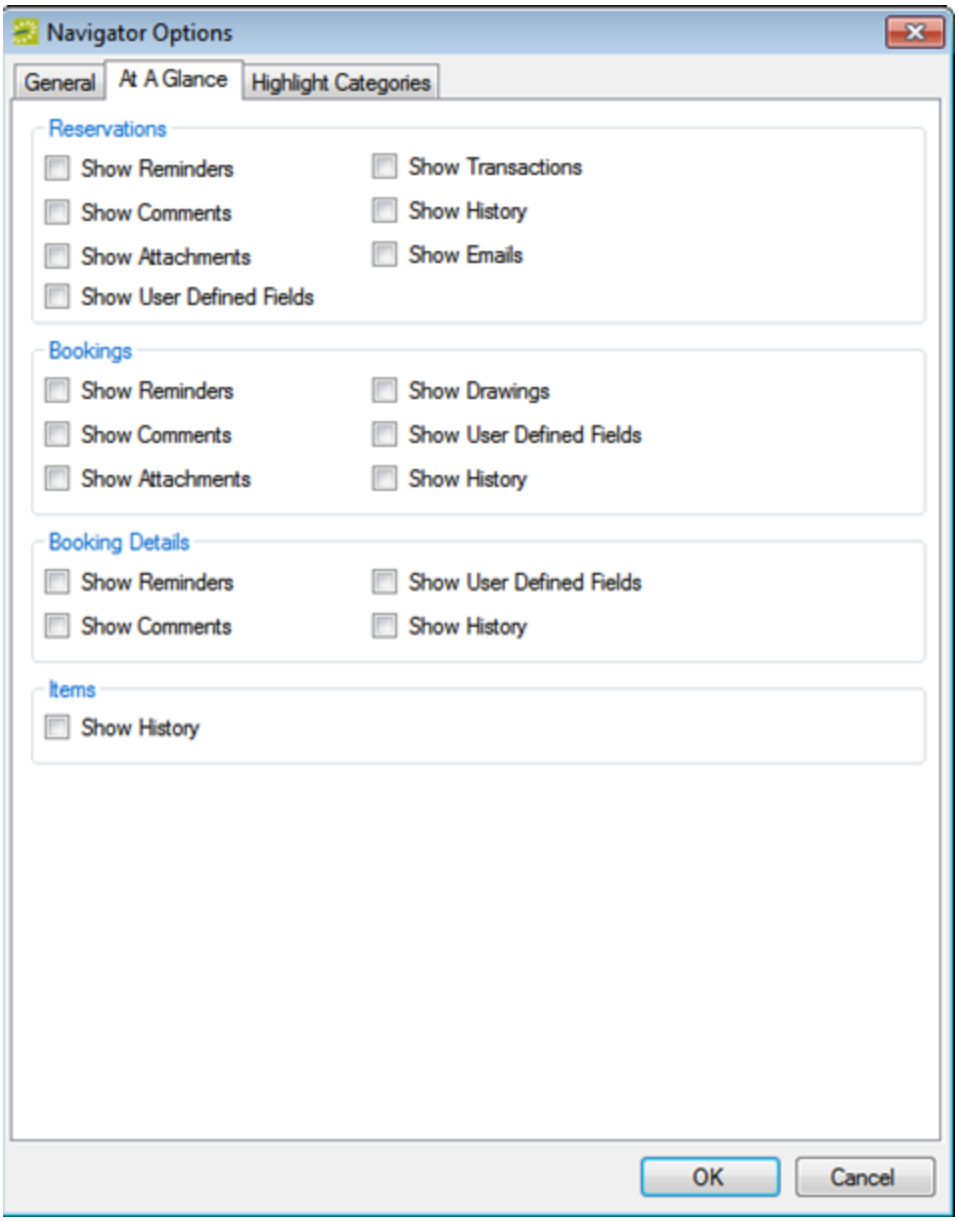
Field	Description
General	
Show Old Bookings	Show bookings in the Navigator that occurred before the current day's date.
Show Canceled	Selected, show bookings in the Navigator with a canceled status.

Field	Description
Bookings	
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 Item	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

Field	Description
	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

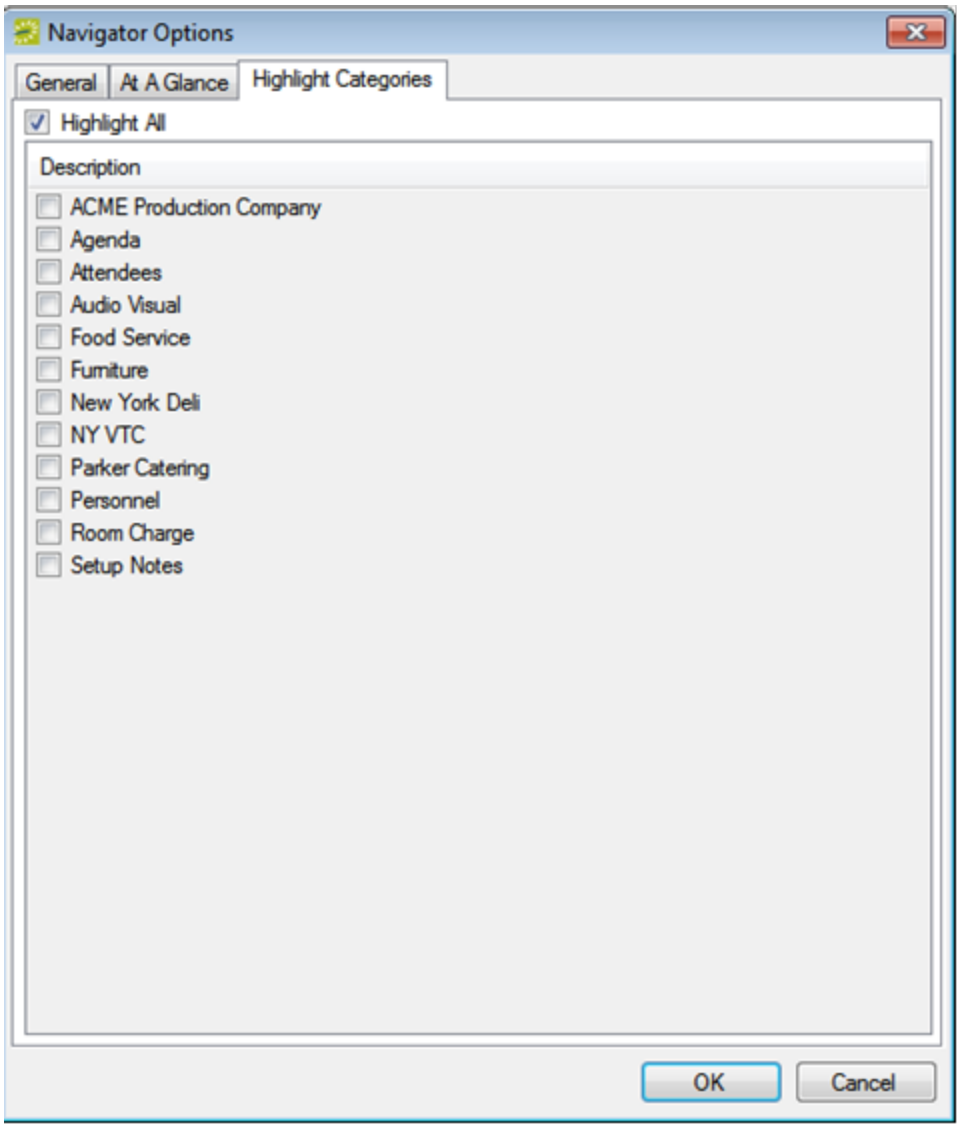
On the At a Glance tab, you specify whether reminders, comments, attachments, and so on are to be displayed in the left pane of the Navigator when a reservation folder, booking folder, booking detail folder, and/or booking detail item is opened.



Navigator Options dialog box, At a Glance tab

Highlight Categories Tab

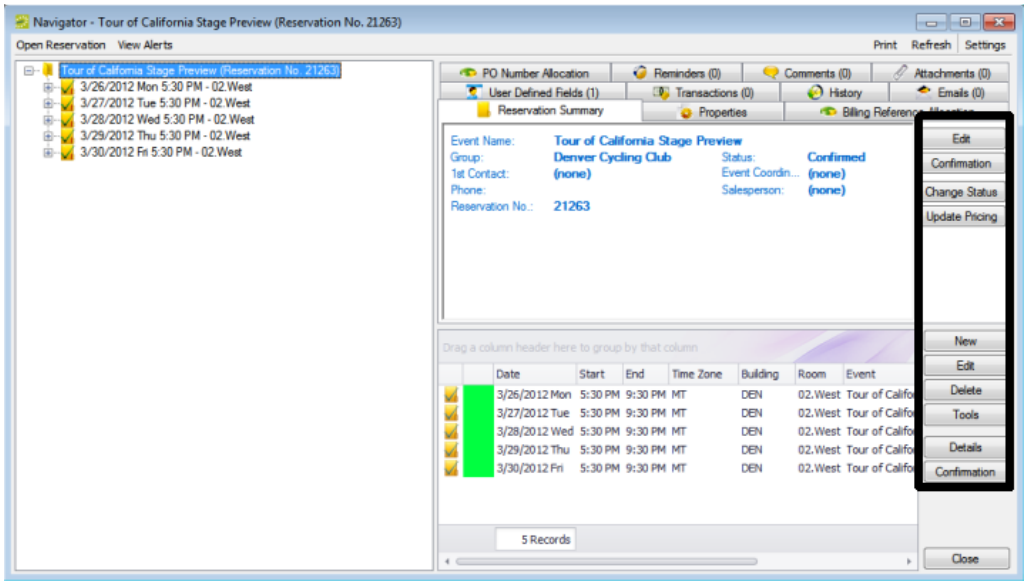
On the Highlight Categories tab, you indicate whether a checkmark is to be displayed on all booking detail item folders for the selected booking detail. The default is to Highlight All, which means every booking detail item folder for every booking detail is denoted with a checkmark.



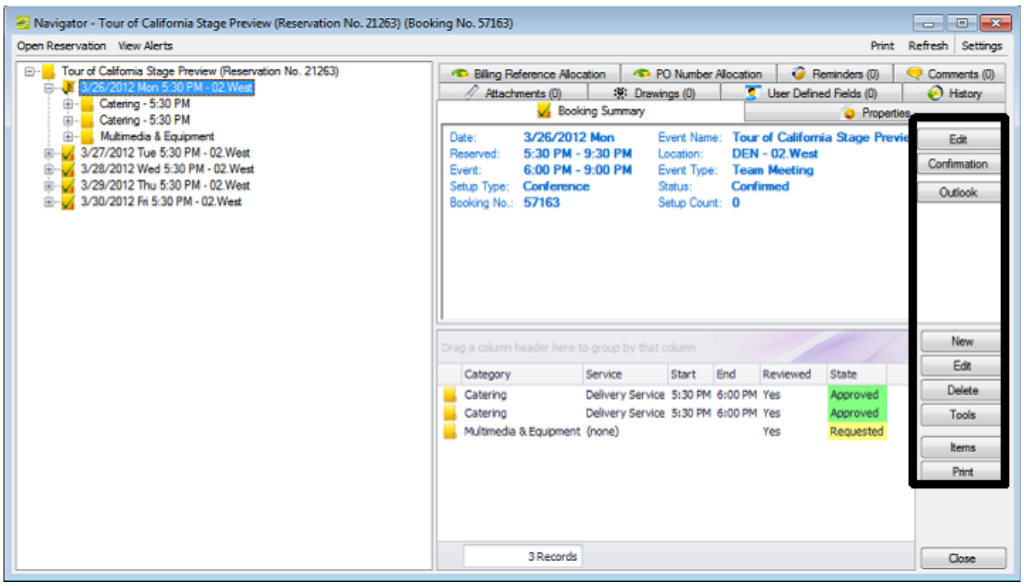
Navigator Options dialog box, Highlight Categories tab

Other Navigator Commands

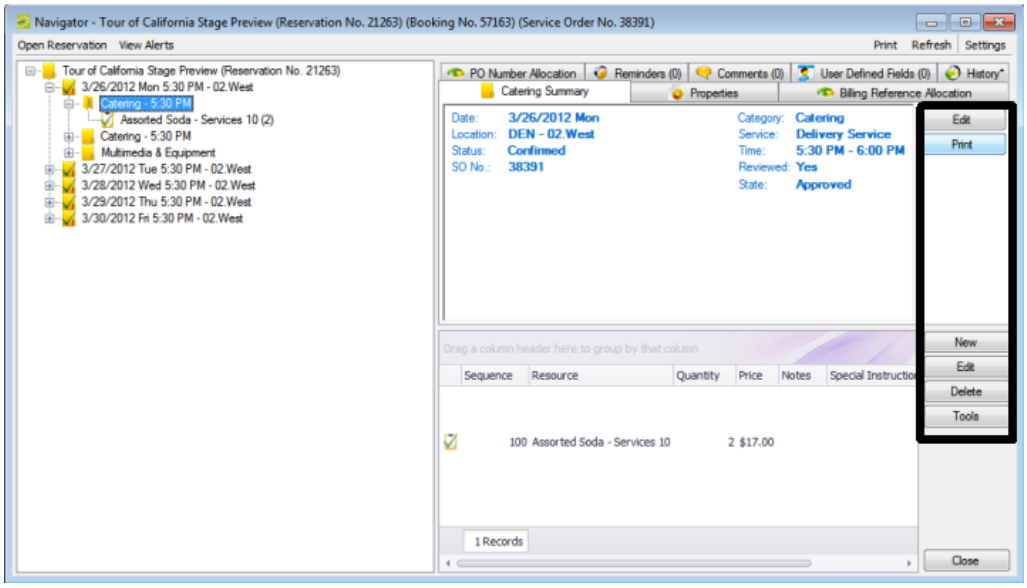
All other Navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator. The buttons that are available are dynamically updated based not only on the folder or item that is currently selected in the left pane of the Navigator, but also on the tab that is open in the upper right pane of the Navigator.



Buttons available in the Navigator window with a reservation folder selected

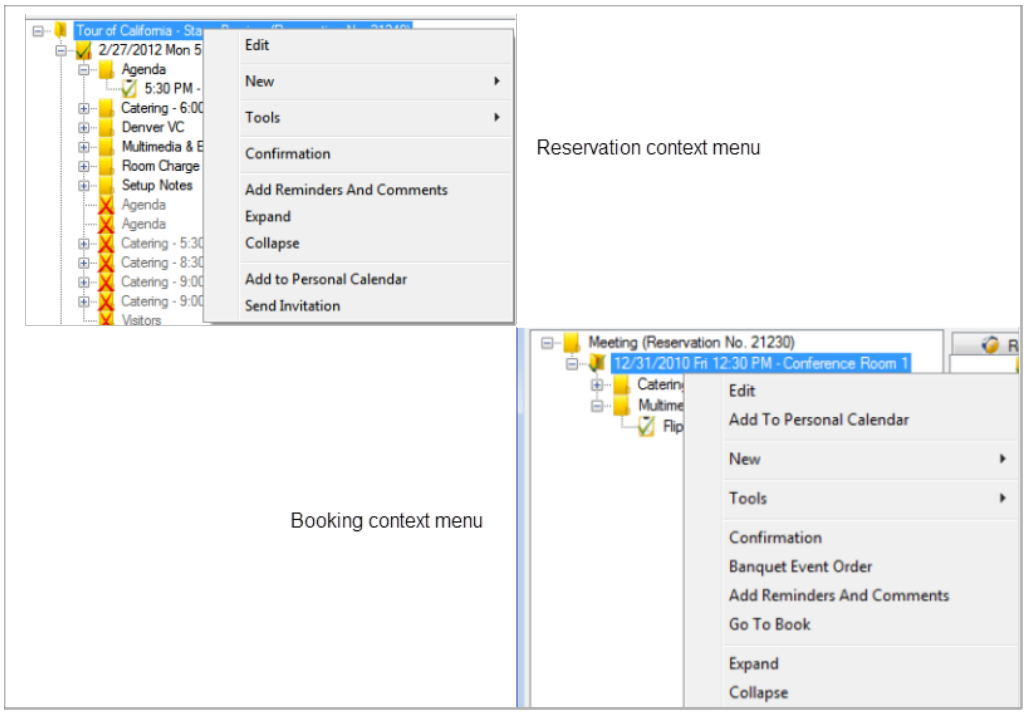


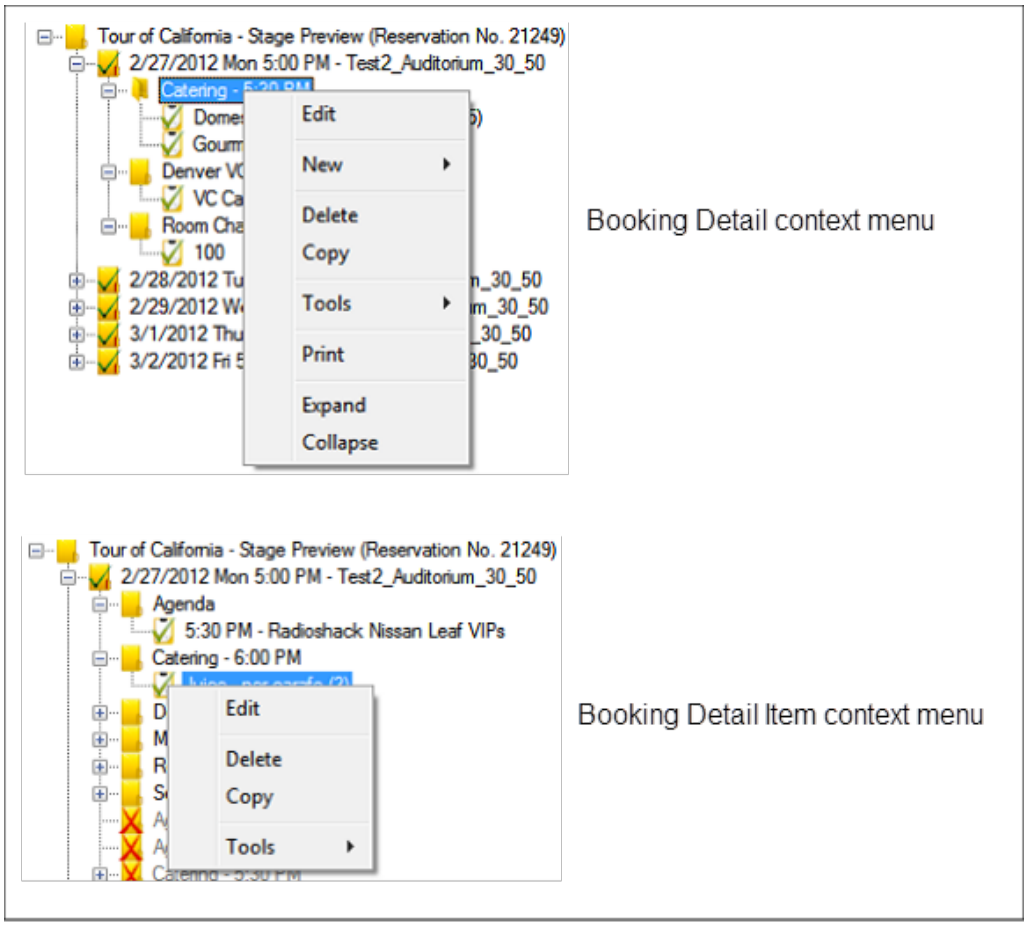
Buttons available in the Navigator window with a booking folder selected



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.





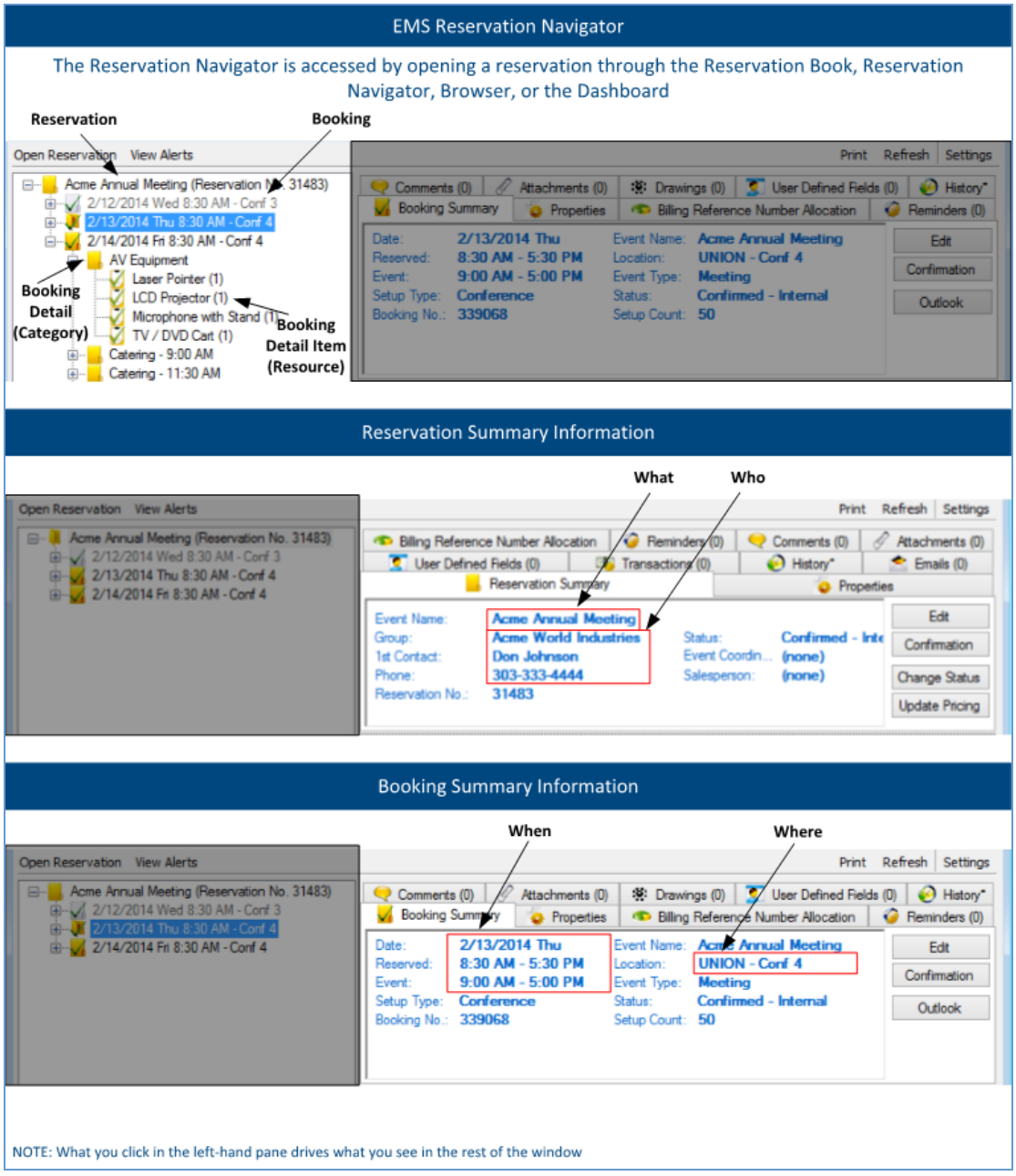
Comparing context menus

CHAPTER 191: Get Familiar with the Navigator

The Navigator is the master page you use to view a reservation and all its details. It launches from many areas of EMS Desktop Client.

To familiarize with the Navigator, this topic provides information on how to do the following:

- Open a reservation in the Navigator
- Review the Navigator's layout and folder structure
- Learn the commands available on the Navigator

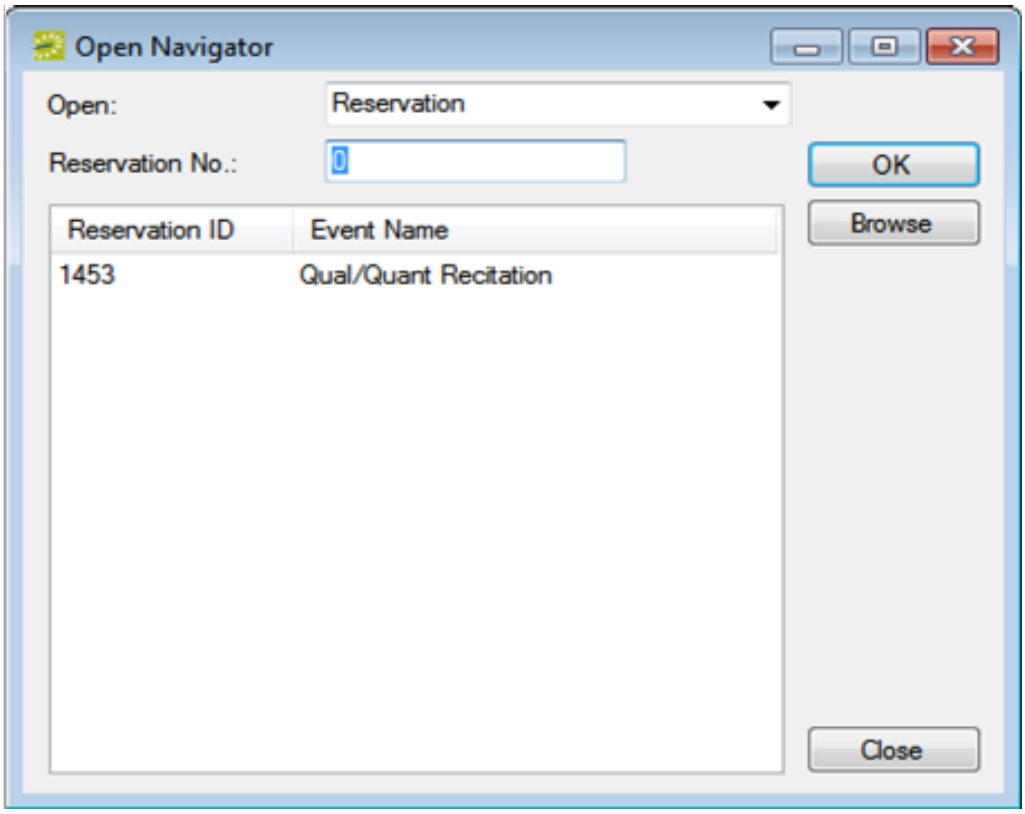


Navigator in EMS Desktop Client

Opening a Reservation in the Navigator

After you create a new reservation using the Reservation Wizard, the reservation opens automatically in the Navigator. To open an existing reservation, follow the steps below.

1. On the toolbar, click the **Navigator** icon. The Open Navigator dialog box.



Open Navigator Dialog Box

2. On the Open drop-down, select the item that you are opening—reservation, booking, or service order.
3. Do one of the following:
   - In the Reservation No. field, enter the reservation ID, service order number, or booking ID, and then click **OK**.
   - To see 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**.

Note:
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 find your reservation.

Opening a Reservation from The Reservation Book

On the toolbar, click the **Book** icon to open the Reservation Book, and then in the Reservation Book, double-click a reservation; this opens the reservation in the Navigator.

Opening a Reservation Through a Group

You can search for a reservation made for a group or individual user from the **Groups** icon; this opens the reservation in the Navigator.

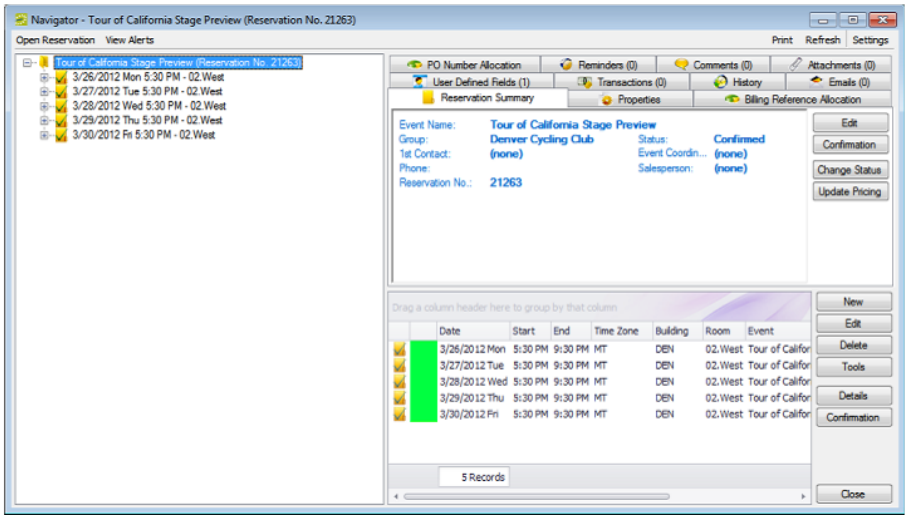
Opening a Reservation Using a Search

You can search for a reservation using the Browser, the Web Reservation Tool, and/or the Calendar. Double-clicking the search result entry will open the reservation in the Navigator. 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:

1. The left pane displays a selected reservation, all the bookings for the reservation, and the details for each booking in a hierarchical 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.
2. The top right pane of the Navigator displays different tabs and options depending on the folder or item that you click on in the left pane.
3. The bottom right pane of the Navigator functions just like a browser window, and shows different information and options depending on the folder or item you click on in the left pane.



Navigator Panes (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. 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. When you select a reservation folder, the bookings for the selected reservation show 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.

When you select a Reservation folder, the following tabs are displayed in the upper right pane of the Navigator:

- Reservation Summary Tab
- Properties Tab
- Billing Reference/PO Allocation Tab
- Reminders Tab
- Attachments Tab
- Comments Tab
- User Defined Fields Tab
- Transactions Tab
- Emails Tab

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/PO Allocation Tab

By default, the charge for a booking is allocated to a single billing reference number and/or a single purchase order (PO) number. This tab enables you to allocate booking charges or booking detail charges to

multiple billing reference numbers and/or PO numbers. Your EMS administrator must enable the "Use Billing Reference Allocation" and "Use PO Number Allocation" parameters for this tab to be displayed.

See Also: Allocating Multiple Billing and PO Numbers For a Reservation.

Reminders Tab

The Reminders tab displays any reminders that were created for the selected reservation.

Attachments Tab

The Attachments tab displays any attachments that were saved with the reservation.

Comments Tab

The Comments tab displays any comments that were made for the selected reservation.

History Tab

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.

User Defined Fields Tab

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 Also: Working with User Defined Fields.

Transactions Tab

The Transactions tab displays any invoices that were generated for the selected reservation or any payments that were applied to the selected reservation.

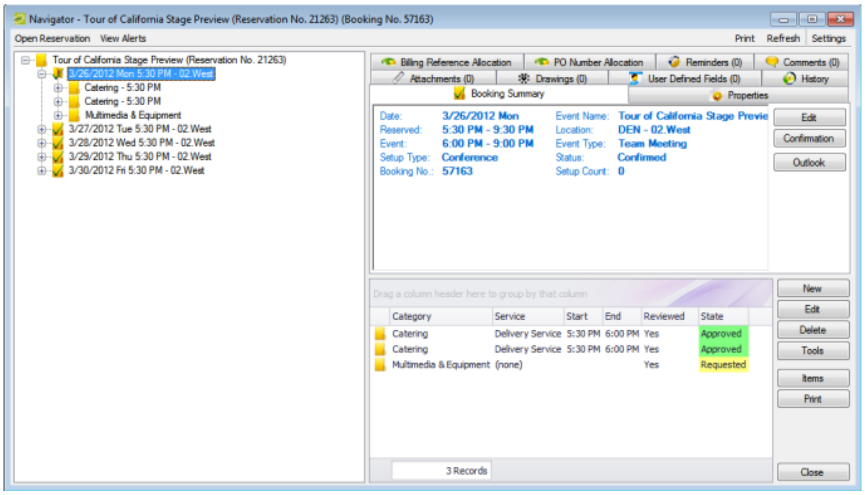
Emails Tab

The Emails tab summarizes any emails that were sent via SMTP to the group for whom the reservation was made. This does not include notifications and other communications done using EMS for Outlook or by other means.

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.



Navigator with 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. 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.

When you select a Booking folder, the following tabs are displayed in the upper right pane of the Navigator:

- Booking Summary Tab
- Properties Tab
- Billing Reference/PO Allocation Tab
- Reminders Tab
- Attachments Tab
- Comments Tab
- Drawings Tab
- History Tab

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 use this tab to add the selected booking to your personal calendar (click Outlook > Add to Personal Calendar) or 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/PO Allocation Tab

By default, the charge for a booking is allocated to a single billing reference number and/or a single purchase order (PO) number. This tab enables you to allocate booking charges or booking detail charges to multiple billing reference numbers and/or PO numbers. Your EMS administrator must enable the "Use Billing Reference Allocation" and "Use PO Number Allocation" parameters for this tab to be displayed.

See Also: Allocating Multiple Billing and PO Numbers For a Reservation.

Reminders Tab

The Reminders tab displays any reminders that were created for the selected booking.

Attachments Tab

The Attachments tab displays any attachments that were saved with the booking.

Comments Tab

The Comments tab displays any comments that were made for the selected booking.

Drawings Tab

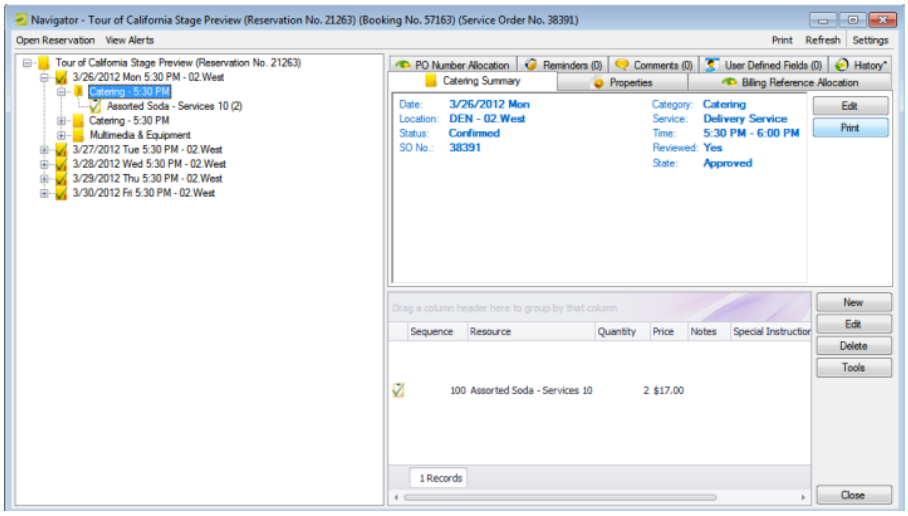
The Drawings tab displays a list of files that were attached to the selected booking.

History Tab

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 add to a booking.



Navigator with Booking Detail Folder Selected

See Also: Adding Services to a Meeting.

Navigator Commands

The Navigator has two constant commands in the upper left corner: **Open Reservation** and **View Alerts**. The Navigator also has three constant commands in the upper right corner: **Print**, **Refresh**, and **Settings**.

Command	Description
Open Reservation	Allows you to open and work with multiple reservations in the same Navigator session.
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. • Printing the Setup Worksheet for Reservation report, the Service Orders report, and the Banquet Event Order report. • Printing the Transaction report. • 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.
Settings	• Options—Opens the Navigator Options dialog box in which you can specify such

Command	Description
	things as what is to be displayed in the Navigator, mouse actions in the Navigator, and so on. • 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.

All other navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator.

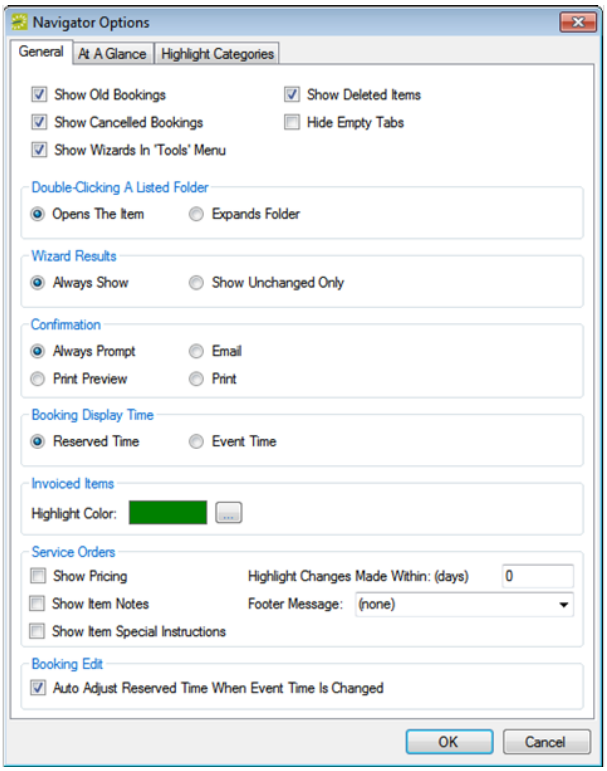
Navigator Options

The Navigator Options (click in the upper right corner) has three tabs:

1. General
2. At A Glance
3. Highlight Categories

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.



Navigator Options Dialog Box, General Tab

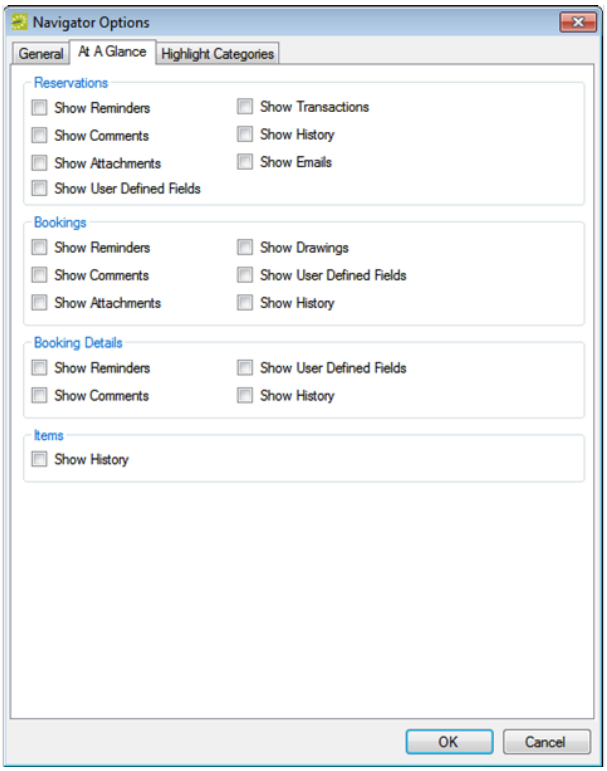
Field	Description
General	
Show Old Bookings	Show bookings in the Navigator that occurred before the current day's date.
Show Canceled Bookings	Selected, show bookings in the Navigator with a canceled status.
Show Wizards in Tools menu	Show all on the Tools menu in the Bookings pane. If cleared, show 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.
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	

Field	Description
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	Show special instructions for items on a service order.

Field	Description
Instructions	
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

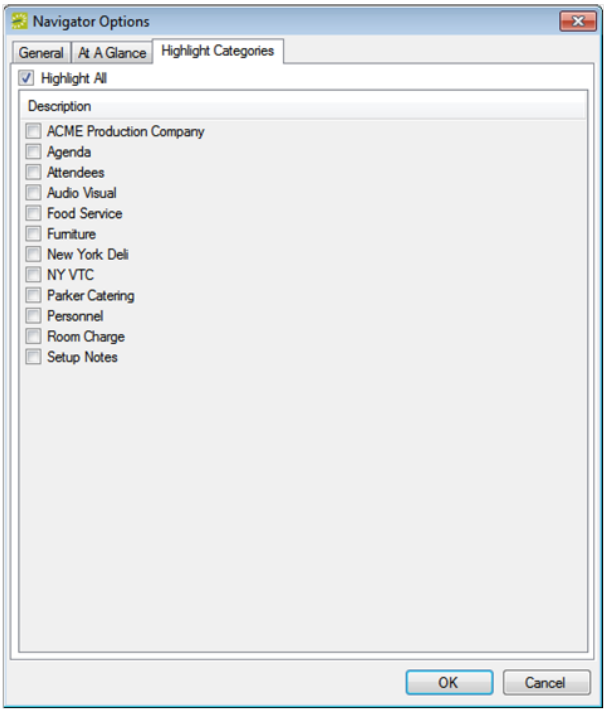
On the **At a Glance** tab, you specify whether reminders, comments, attachments, and so on are to be displayed in the left pane of the Navigator when a reservation folder, booking folder, booking detail folder, and/or booking detail item is opened.



Navigator Options Dialog Box, At a Glance Tab

Highlight Categories

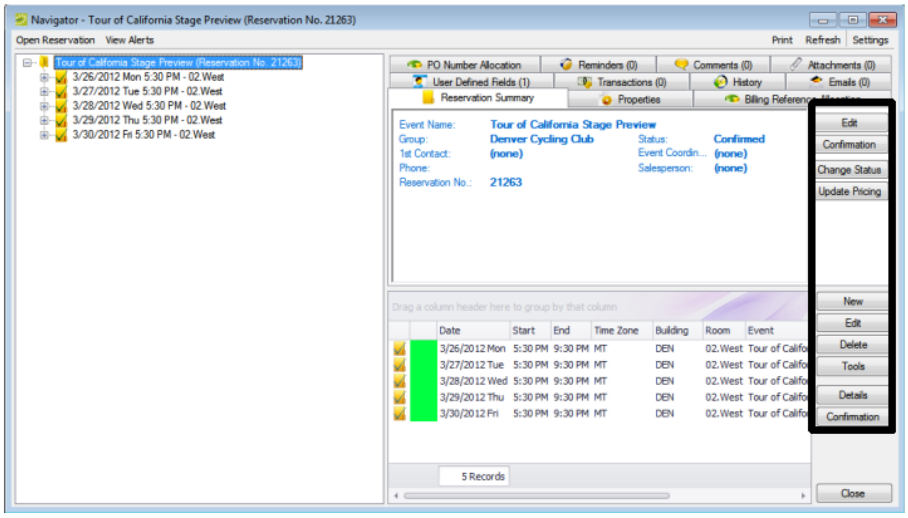
On the **Highlight Categories** tab, you indicate whether a checkmark is to be displayed on all booking detail item folders for the selected booking detail. The default is to Highlight All, which means every booking detail item folder for every booking detail is denoted with a checkmark.



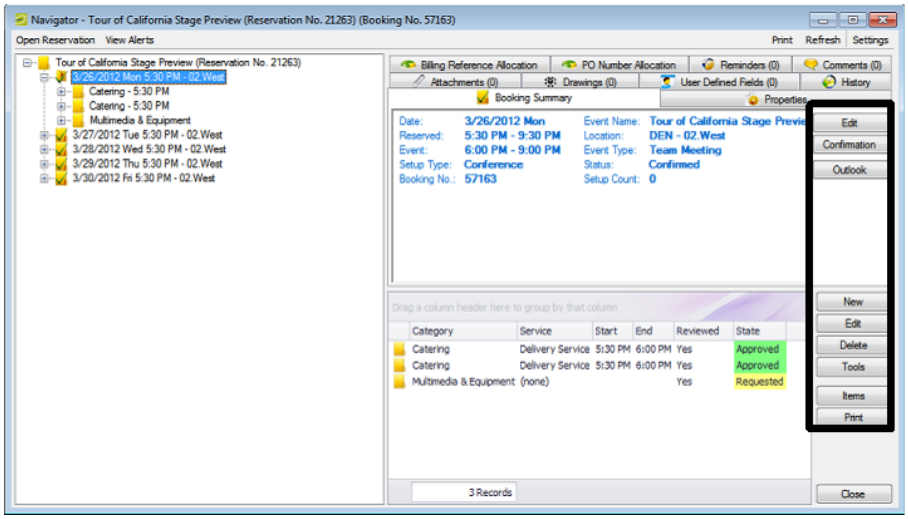
Navigator Options Dialog Box, Highlight Categories Tab

Other Navigator Commands

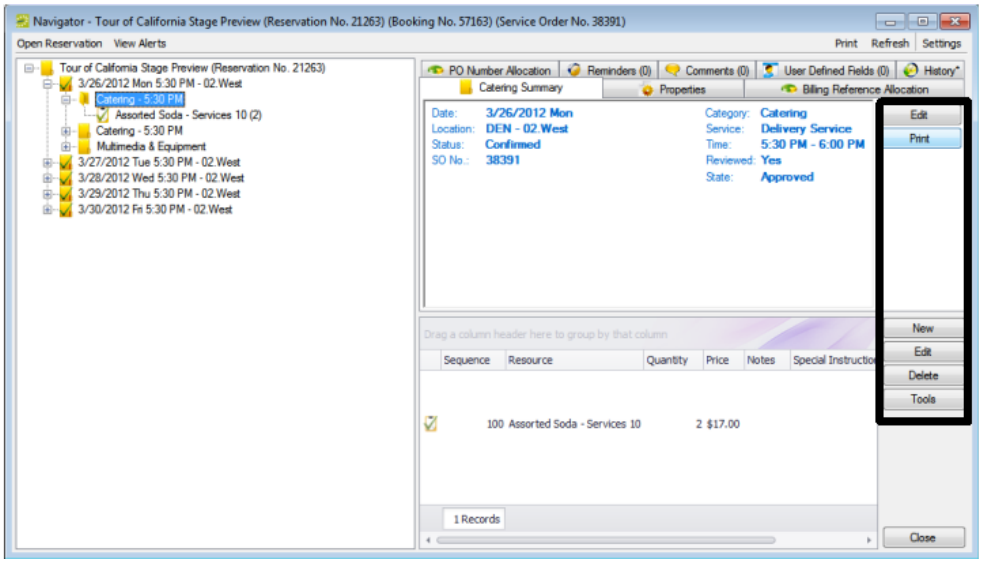
All other Navigator commands are available as buttons in the upper right pane and lower right pane of the Navigator. The buttons that are available are dynamically updated based not only on the folder or item that is currently selected in the left pane of the Navigator, but also on the tab that is open in the upper right pane of the Navigator.



Buttons available in the Navigator window with a reservation folder selected

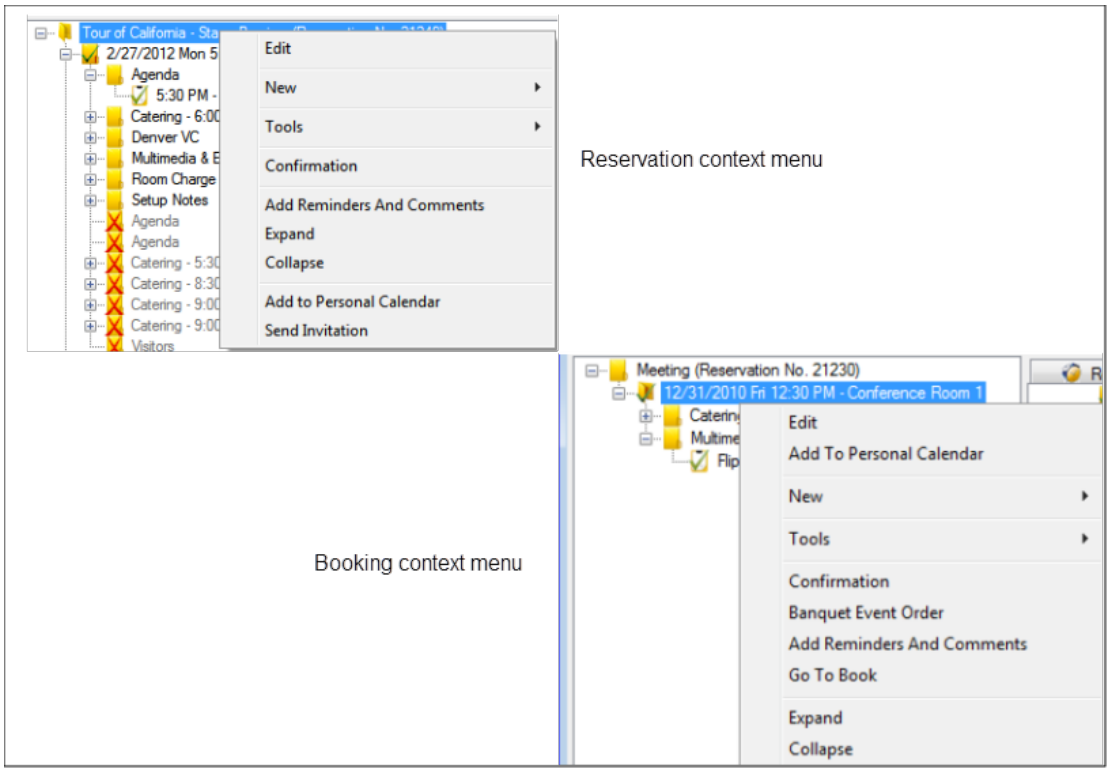


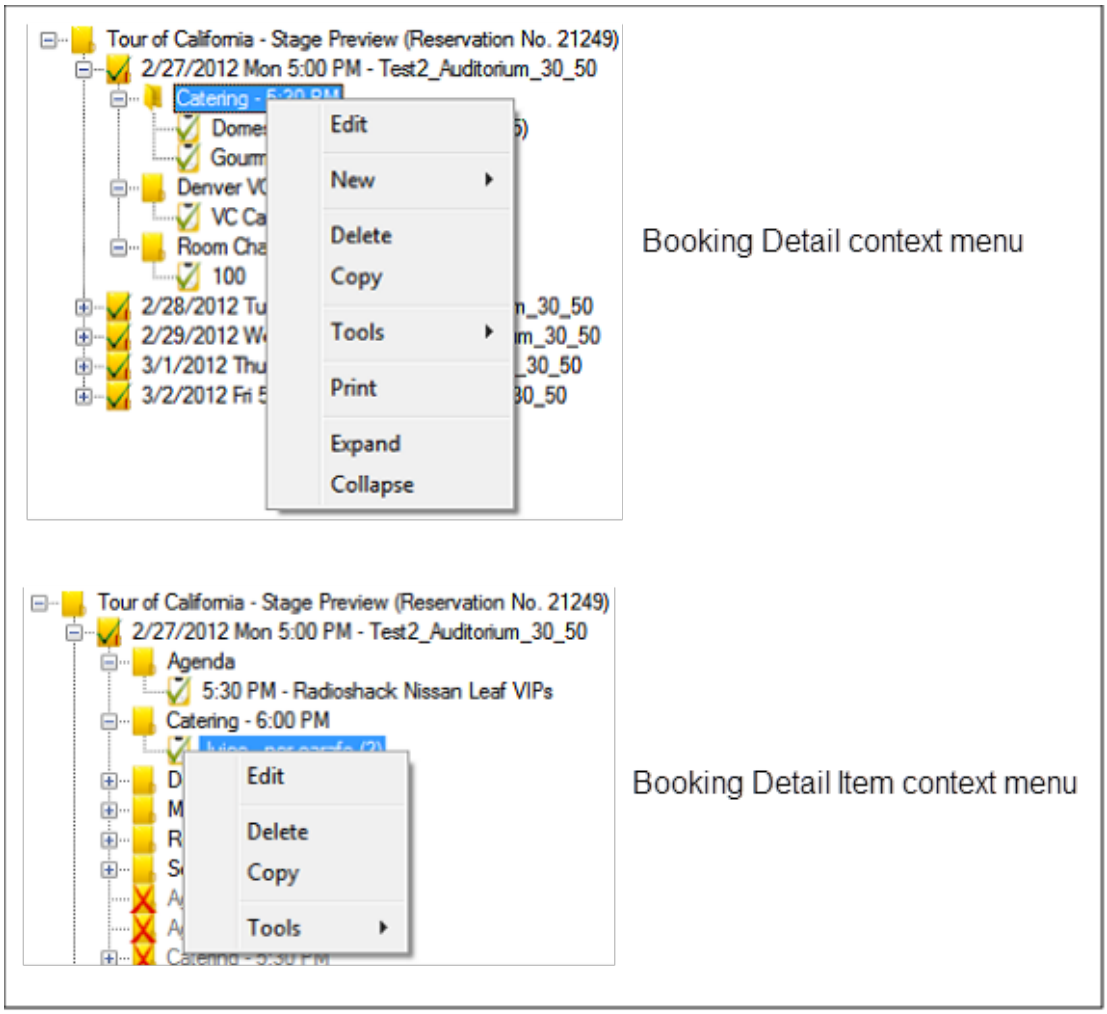
Buttons available in the Navigator window with a booking folder selected



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.





Comparing context menus

CHAPTER 192: Edit a Reservation in the Navigator

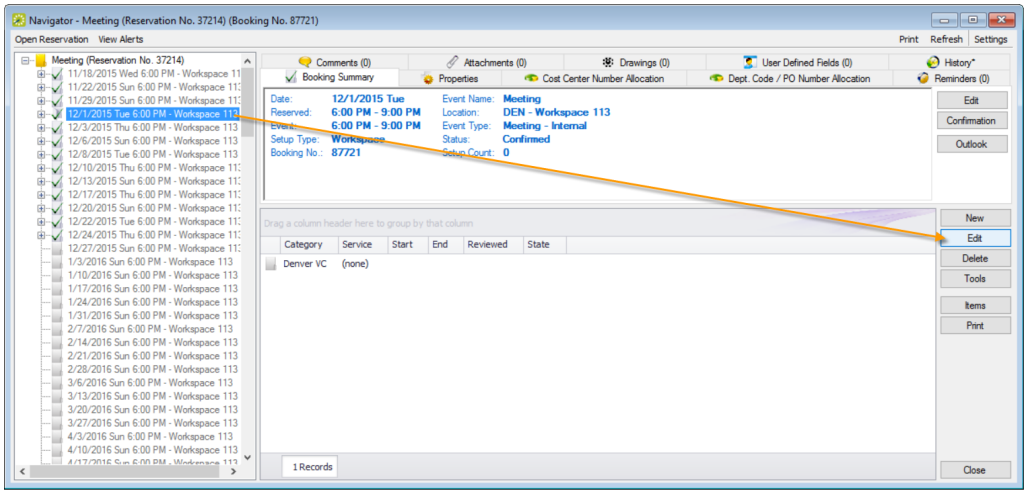
When you edit a reservation in the Navigator, you are working with the who and the what information for the event: the event name, the group name, and so on. When you edit a reservation, you can edit the reservation information (event name, event coordinator, and so on), and you can edit the billing information (pricing plan, payment type, and so on).

Note:

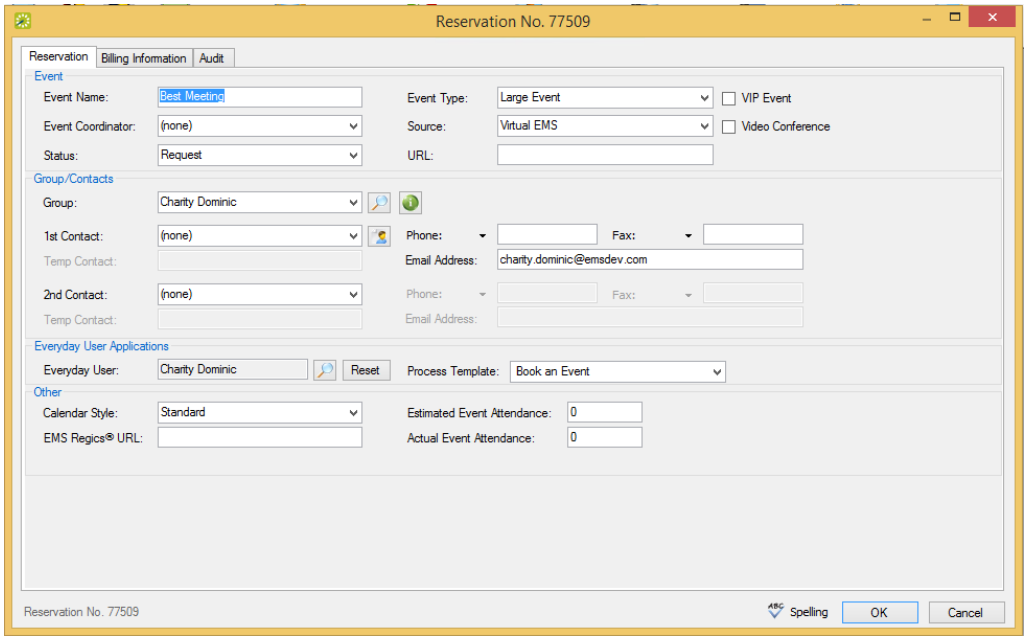
When you edit a reservation, if you select a different pricing plan, that plan is applied at the reservation level only; categories and room charges are not automatically repriced. To reprice your categories or room charges based on a new pricing plan, you use the Update Pricing Plan wizard.

See Also: Repricing Categories and Room Charges for a Reservation.

1. Open the reservation in the Navigator.
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.



3. Edit information on the Reservation and Billing Information tabs as needed.



Note:

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.

4. Click **OK**. The Reservation window closes and you return to the Navigator, which now shows the updated information for the reservation.

CHAPTER 193: Add Bookings to a Reservation in the Navigator

You can use the Navigator to add one or more bookings to an existing reservation.

1. Open the reservation in the Navigator. See Navigator Overview.
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 Also: Create a Reservation in the Reservation Wizard

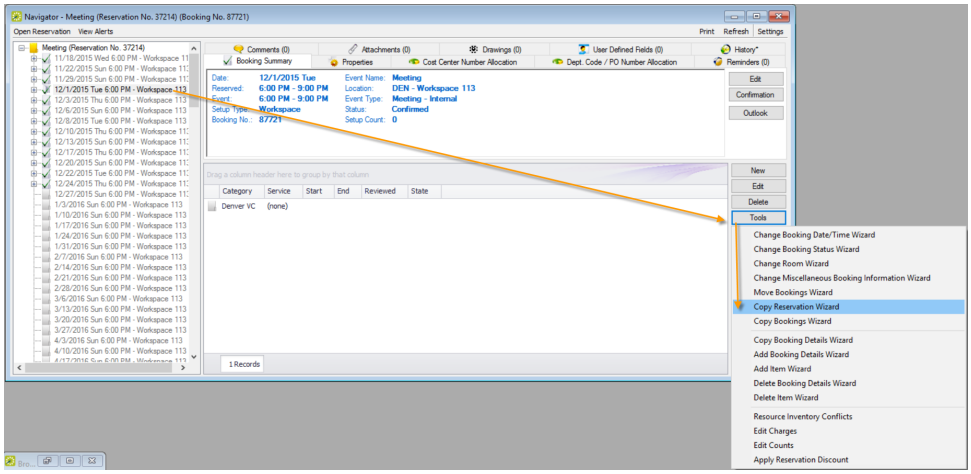
CHAPTER 194: Copy a Reservation in the Navigator

You can make a new reservation easily by copying an existing one and then make any necessary changes to it. When you copy an existing reservation, you must provide a new start date and a new status, however, you can copy existing reservation reminders, comments, user-defined fields, and drawings "as-is," and you can copy one or more or all the existing booking details.

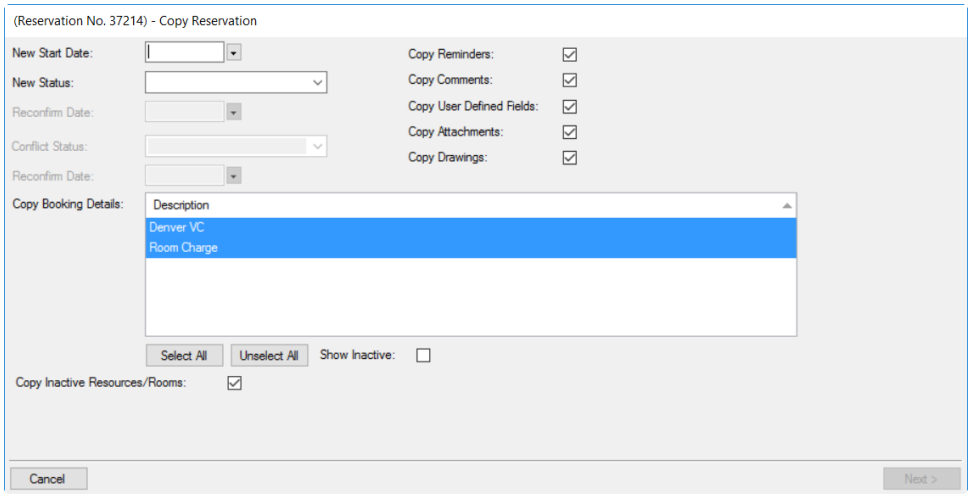
1. Open the reservation in the Navigator.

2. In the left pane of the Navigator, select the reservation you want to copy, and then in the right pane, click **Tools**.

3. Click **Copy Reservation Wizard**.



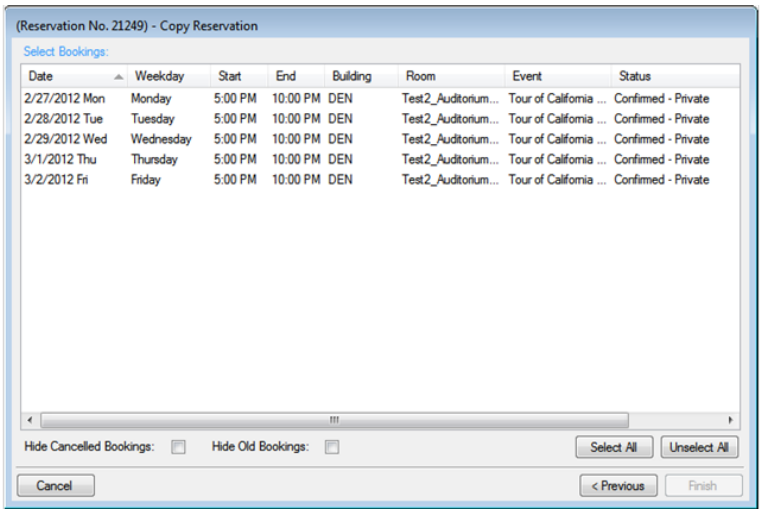
4. The Copy Reservation Wizard opens.



5. Enter the information for the new reservation.

Field	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 a date if it is required for the new status that you selected.
Conflict Status	Enter a conflict status in the event that the new bookings are in conflict with any existing bookings.
Reconfirm Date	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.

6. Click **Next**. The Select Bookings window opens. This window displays all the bookings for the reservation that you are copying.



Note:

You can use the **Hide Canceled Bookings** option to show or hide canceled bookings. To show all bookings regardless of date, clear **Hide Old Bookings**.

Note:

The start date that you specified becomes the date of the first booking for the new reservation. Once you copy bookings for this reservation, they 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.

7. Select the booking(s) you want to 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.

Note:

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 Changing Rooms for Bookings.

8. Click **OK** to close the message and return to the Navigator. Both the existing reservation and the new reservation are now listed 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.

CHAPTER 195: Change 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 Web App 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.

Note:

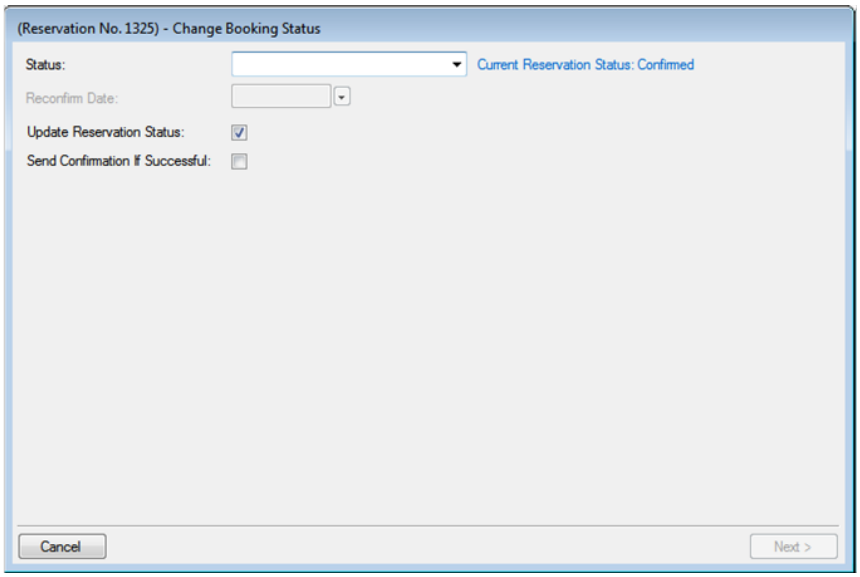
Your EMS administrator must grant you the appropriate security access to change the status of a booking, which includes canceling a booking. If you want to change the status of a booking using the Change Booking Status Wizard, see Editing Multiple Bookings in the Navigator.

Note:

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 and Search for and Configure Groups.

To change the status for a reservation, follow these steps:

1. Open the reservation in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
   - Open a reservation through search
2. In left pane in 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.



Change Booking Status window

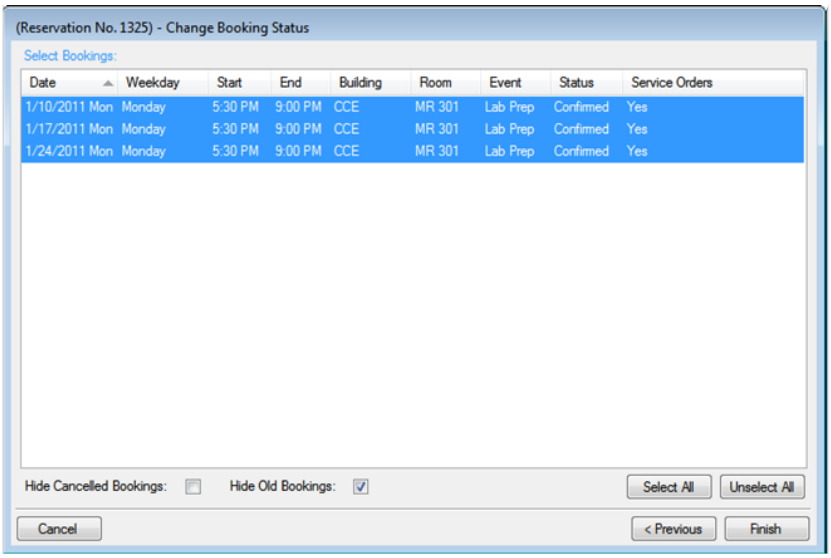
3. On the Status drop-down list, select the new status for the bookings.

> **Note:**
> If you select any type of Canceled status, then three additional fields—Reason, Who Canceled 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.

> **Note:**
> The confirmation is generated based on the system confirmation settings that you have specified. See Specifying your Confirmation Settings.

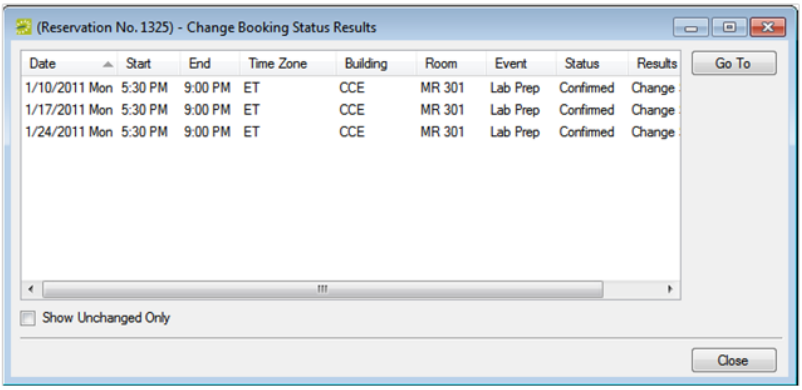
6. Click **Next**. The Select Bookings window opens. This window displays all the bookings for the selected reservation with a date greater than or equal to the current day's date and that do not have invoiced items. By default, all the bookings are selected.



Note:

To show canceled bookings, clear **Hide Canceled Bookings**. Conversely, to hide canceled bookings, select **Hide Canceled 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.



Note:

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.

Important!

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**.

CHAPTER 196: Reprice Categories and Room Charges for a Reservation

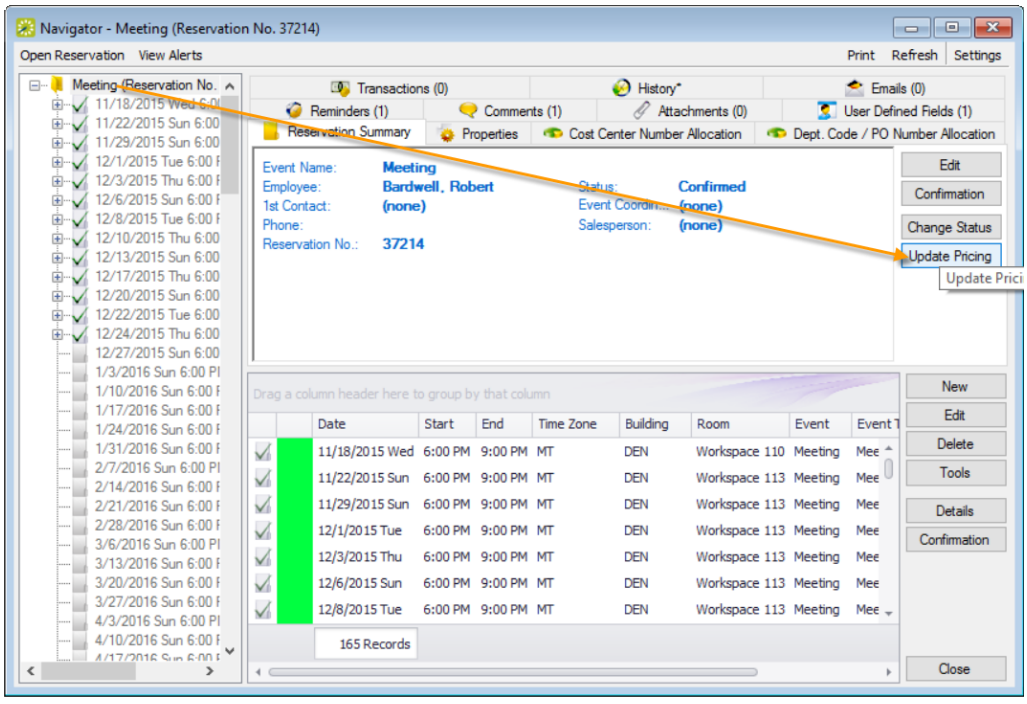
When you edit a reservation, changes to the pricing plan are applied at the reservation-level only. Booking level service categories and room charges are not automatically repriced. To reprice services or room charges based on a new pricing plan, use the Update Pricing Plan Wizard shown here.

Note:

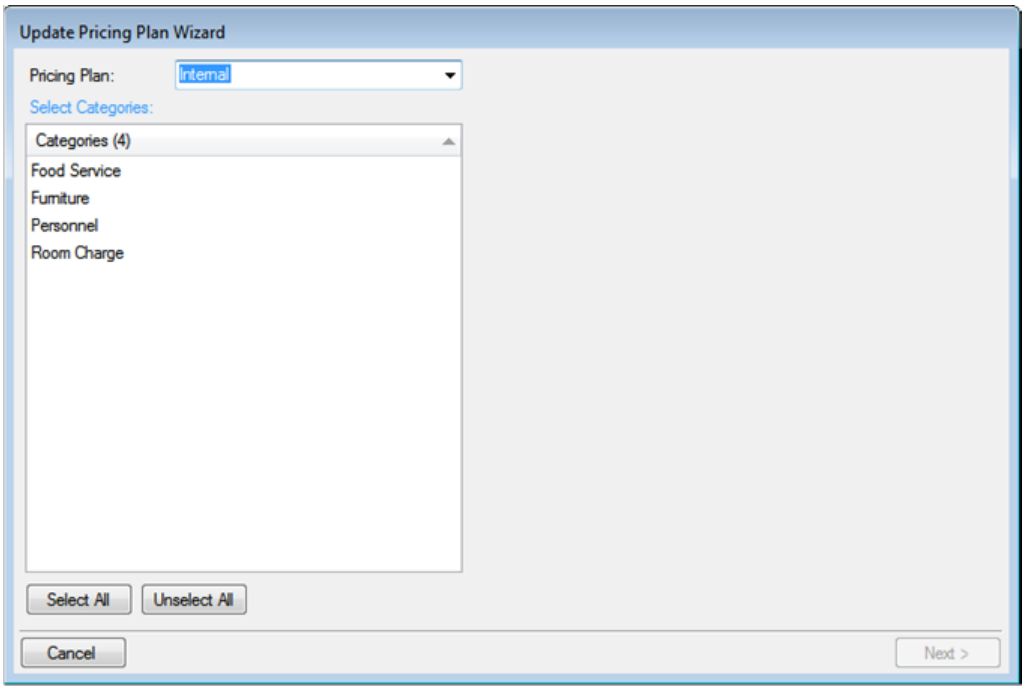
You can reprice a room charge for a booking only if the room charge has not been invoiced. To reprice a room charge that has been invoiced, you must first void the invoice.

Additionally, you can also Edit Charges for Multiple Billable Items.

1. Open the parent reservation in the Navigator.
2. In left pane the Navigator, select the reservation or booking with which you want to work, and then on the **Reservation Summary** tab, click **Update Pricing**.



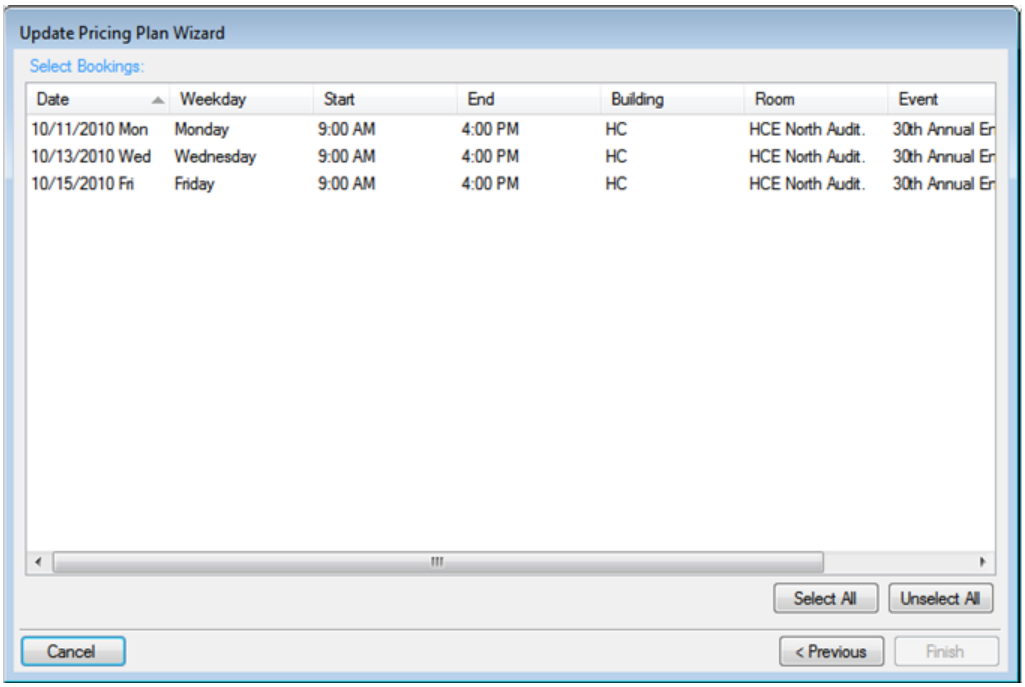
3. The Update Pricing Plan Wizard opens. The current pricing plan for the reservation is displayed in the Pricing Plan field. The window displays all the service categories and room charges that can be repriced in one or more of the reservation bookings.



Note:

If the reservation has other optional Pricing Plans, you can change the list using the drop-down field at the top.

4. Select a service category or room charge (CTRL-click to select multiple items) to reprice and click **Next**.
5. The next window lists all bookings under the reservation that have one or more of the selected service categories or room charges that you can reprice.



6. Select the booking(s) for which you want to apply the repricing (you can click **Select All** to select all the displayed bookings in a single step), and then click **Finish**. A message confirms your changes.
7. Click **OK** to close the message and return to the Navigator.

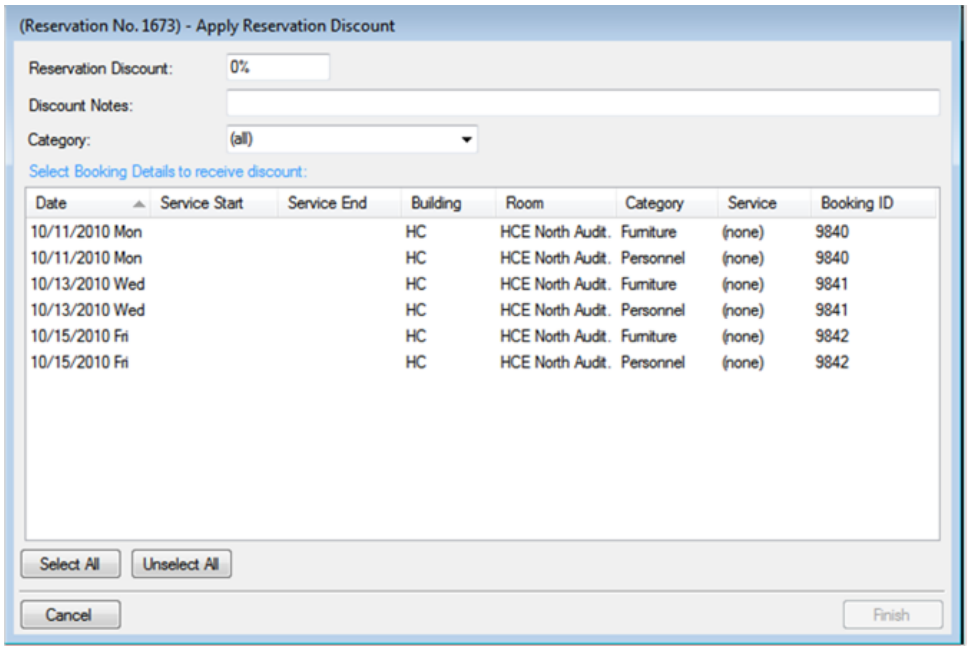
CHAPTER 197: Apply a Reservation Discount

You use the 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.

Note:

To apply a discount to invoiced items, you must first void the invoice. See Void an invoice.

1. Open the reservation in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
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.



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 drop-down 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 appears 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 Edit a Reservation in the Navigator.

CHAPTER 198: Edit 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. If you cannot change a booking and you have appropriate permissions, it might be locked.

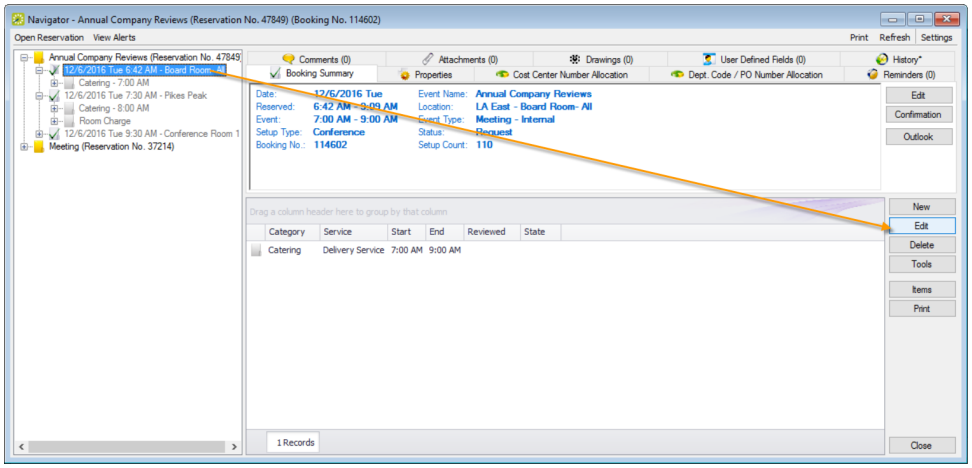
To edit billable information for a booking, see Edit Booking Detail Item Charges for Multiple Items.

Note:

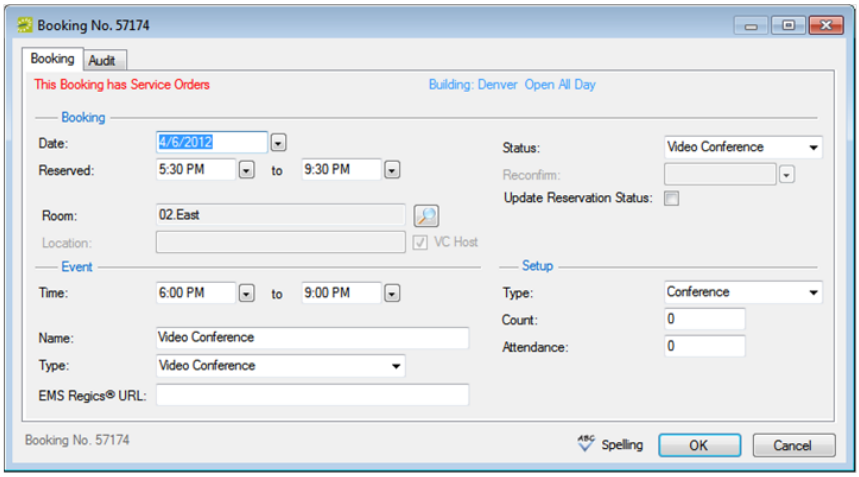
Remember, you can also edit certain booking information in the Reservation Book.

1. Open the Navigator.

2. In left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible. Select the booking you want to change; the panes on the right refresh to show information for the booking. On the Booking Summary tab or on the Properties tab, click Edit.



3. 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.



Note:

If you have access, you can change the status of a booking, including canceling a booking.

- If you change the status for a booking, you can select Update Reservation Status to change the reservation-level status to match.
- If you edit a video conference, any date and time changes you make to the booking automatically cascade to all related bookings.

4. On the Booking tab, edit the information for the booking as needed, and then click OK.
   - 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 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. Click Yes. The Booking window closes and you return to the Navigator, which now shows the updated information for the booking. If you reserved a resource, a Resource Inventory Conflicts report then opens. 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.

CHAPTER 199: Edit Multiple Bookings in the Navigator

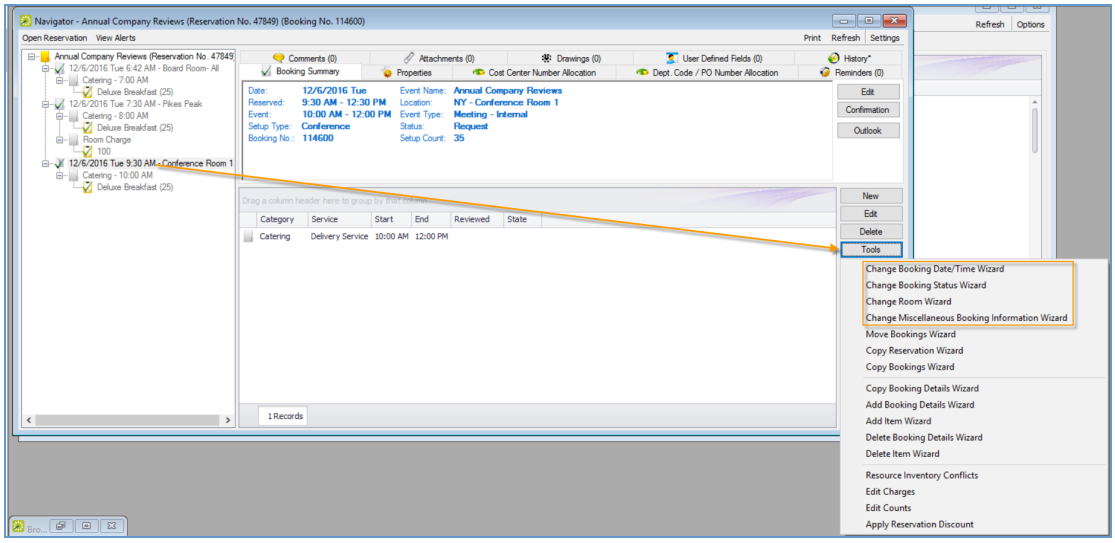
This topic guides you in using the wizards available from the Navigator to make the same changes to multiple bookings at once. To edit billable information for a booking, see Edit Charges for Multiple Items.

This topic will also provide information on:

- Change the Booking Date/Time
- Change Booking Status
- Change Rooms
- Change Miscellaneous Information

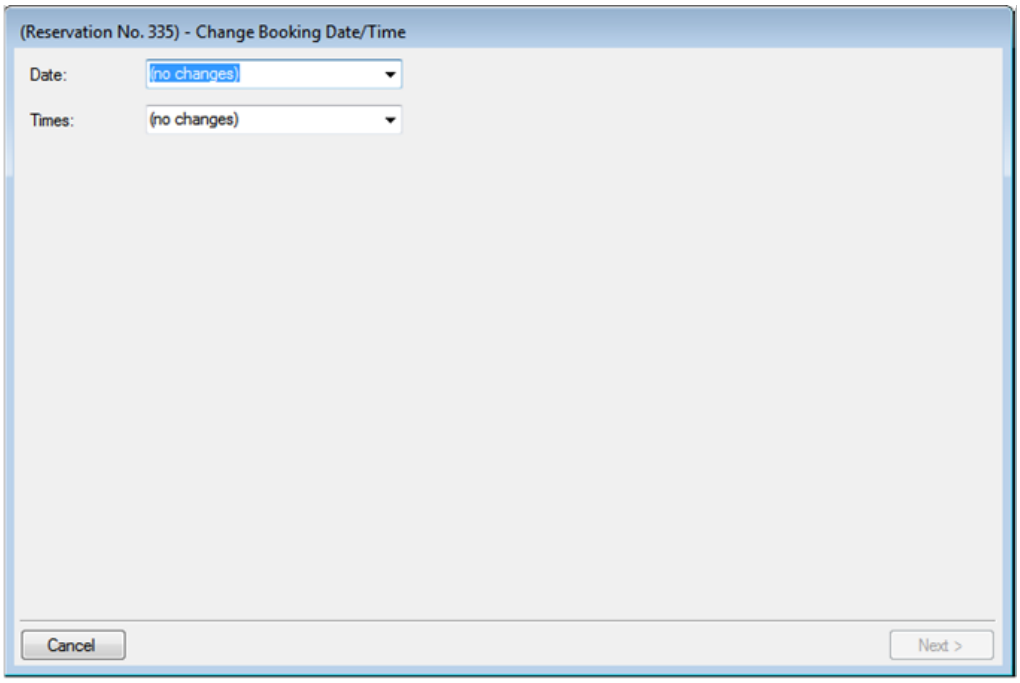
Edit Multiple Bookings

1. Open the Navigator.
2. Select the booking(s) on the left pane that you want to apply the same change(s). The Tools menu offers several wizards to help you batch-edit the bookings with the same changes.



Change the Booking Date/Time

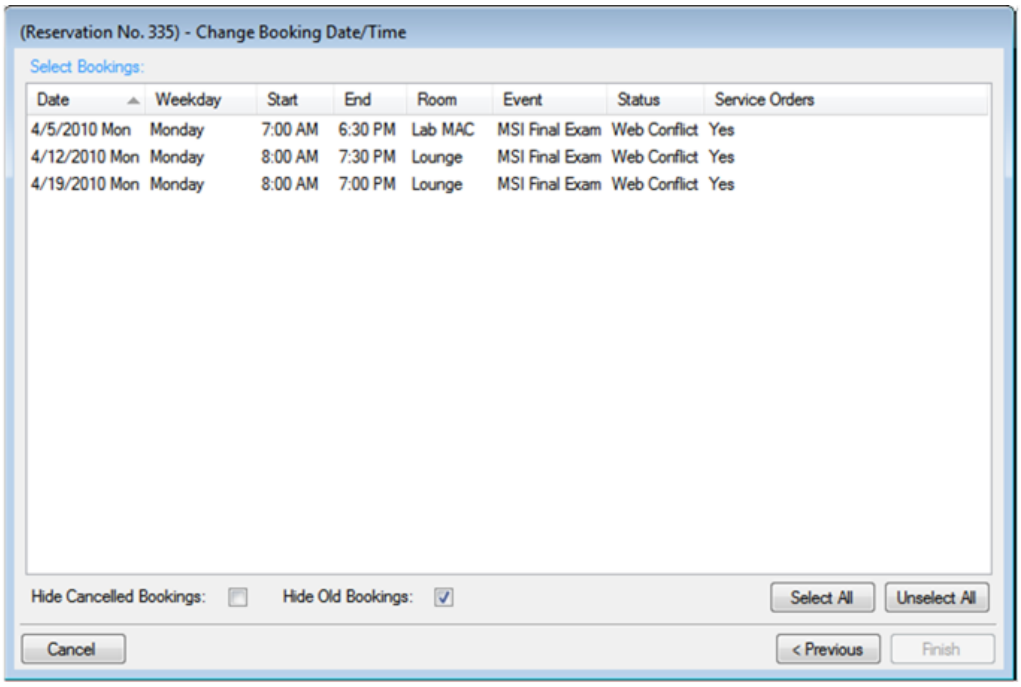
1. In the Bookings pane, click Tools > Change Booking Date/Time Wizard. In the window that presents, make changes using the field definitions below.



Field	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

Field	Value	DESCRIPTION
		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 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.

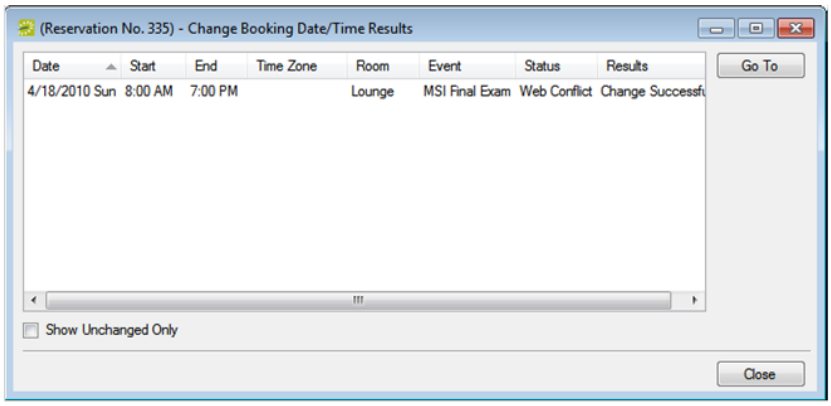
2. Click Next. The Select Bookings window opens, showing all current and future bookings for the selected reservation so you can select which ones to which to apply the date/time change.



Note:

To show canceled bookings, clear Hide Canceled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.

3. Select bookings to which to apply the date/time change and then click Finish. The Change Booking Date/Time Results window opens to show the new changes.

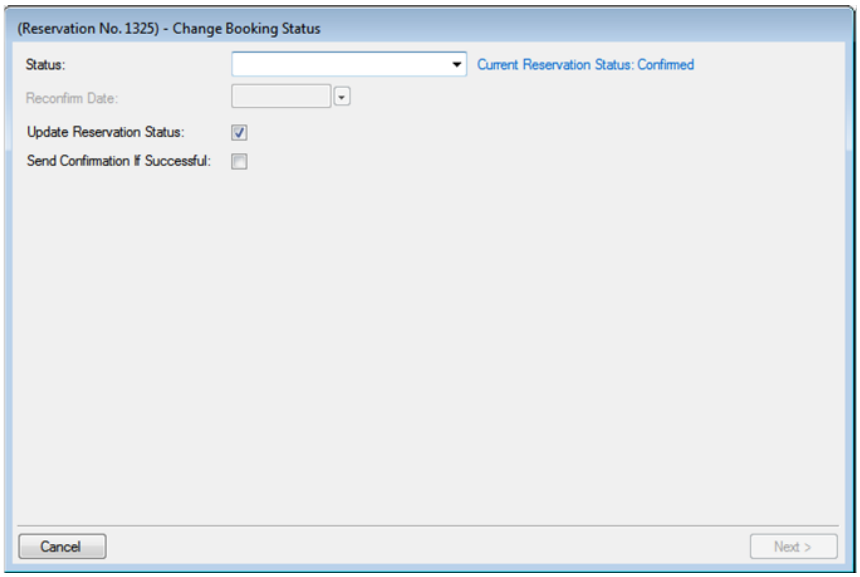


4. Click Close to return to the Navigator.

Change Booking Status

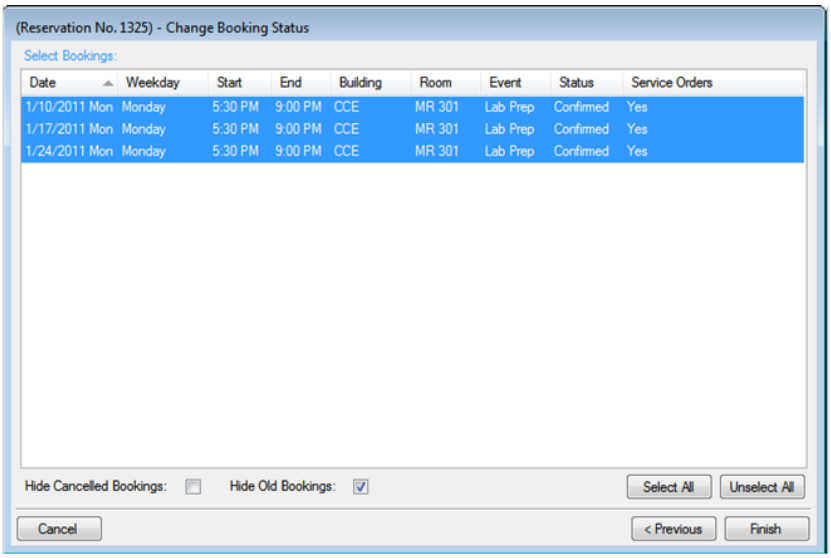
If authorized, you can change the status of multiple bookings using the Change Booking Status Wizard (includes canceling a booking). If you change the status for a booking, you can quickly change the parent reservation status to match.

1. In the Bookings pane, click Tools > Change Booking Status Wizard. The Change Booking Status Wizard opens. Select the new Status for the request.

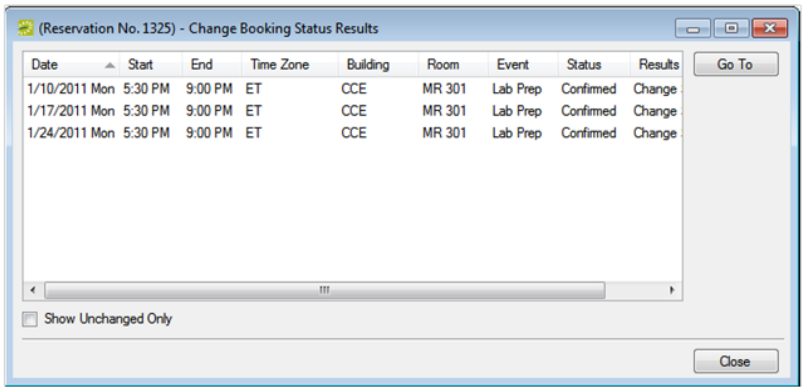


Note:
If you select any type of Canceled status, three additional required fields present: Reason, Who Canceled and Notes. For status changes to bookings, you can leave Update Reservation Status selected to change the parent reservation status to match. You can select Send Confirmation If Successful to trigger an email to the group or individual for whom the reservation was made (depending on your Confirmation Settings).

2. Enter a Reconfirm Date (if required) for the new status you selected.
3. Click Next. The Select Bookings window opens, listing all the current and upcoming bookings for the reservation that do not have invoiced items. By default, all the bookings are selected. To show canceled bookings, clear Hide Canceled Bookings. To show all bookings regardless of date, clear Hide Old Bookings.



4. Select the booking(s) for which you want to change changing the status, and then click Finish. The Change Booking Status Results window to show booking status changes for this reservation.



Note:

To see only bookings that were not changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To. 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 when you Close this window. You can manually run a Resource Inventory Conflict report: in the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

5. Click Close to close the Change Status Results wizard and return to the Navigator.

Change Rooms

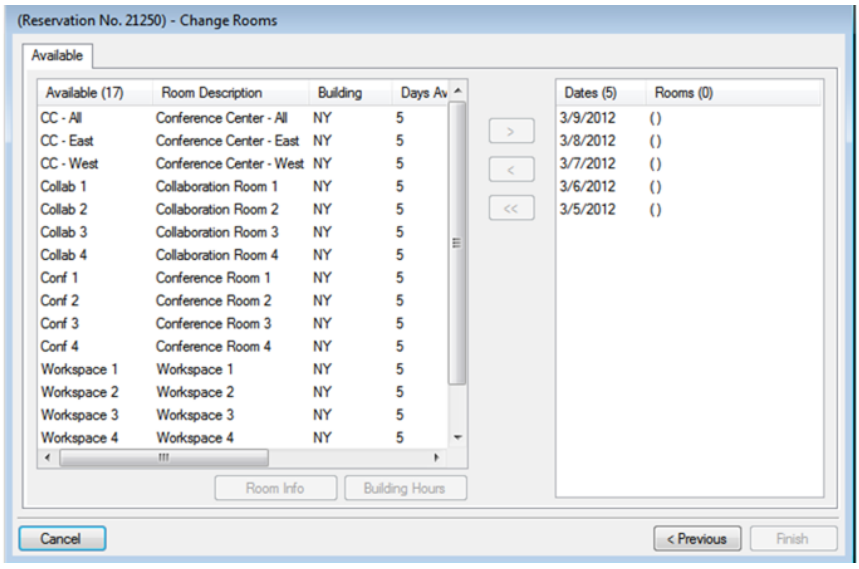
1. In the Bookings pane, click Tools > Change Room Wizard. The Change Room Wizard opens, where you can specify whether you want to search for rooms or only change to a specific room.

> **Note:**
> Clicking Search for Rooms changes this workflow to present you with a list of all available rooms that match your search criteria later in these steps. Clicking Specific Room means you can search for a room using the Search icon. In this case, you will not need to select from a list of rooms later.

2. Once you select the new room, the Change Rooms window refreshes so you apply detailed changes to the bookings.

> **Note:**
> In the left pane, select the bookings you want to move to a new room. 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.

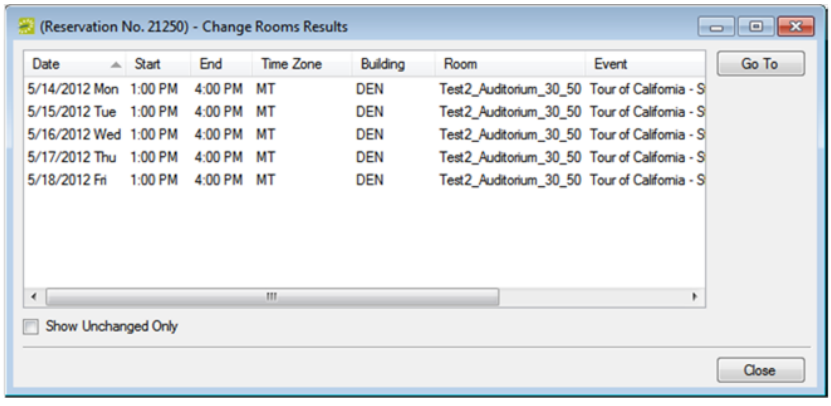
3. If prompted, enter a new setup count. Make sure that this count is the maximum that you expect the new room to hold. You can apply the following options: Update Setup Type on Selected Bookings and/or Update Setup Count On Selected Bookings (use Minimum).
4. To apply the same status change to the parent reservation, select Update Reservation Status.
5. Click Next. The Change Room Wizard is refreshed with an Available tab (if you selected Search for Rooms initially, and if applicable, a Conflicts tab.
    a. The Available tab shows available rooms that match your criteria, and 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.
    b. The Conflicts tab lists rooms (if any) that were not available due to booking conflicts.



Note:

You can click Room Info to see room properties, setup type, features, and pricing, or Building Hours to see when the selected room/building is open.

6. Select from the list of available rooms and use the arrow buttons to move them to the right pane.
7. When you have fulfilled all dates, click Finish
8. Once you confirm your changes, the Change Rooms Results window opens to show your changes.

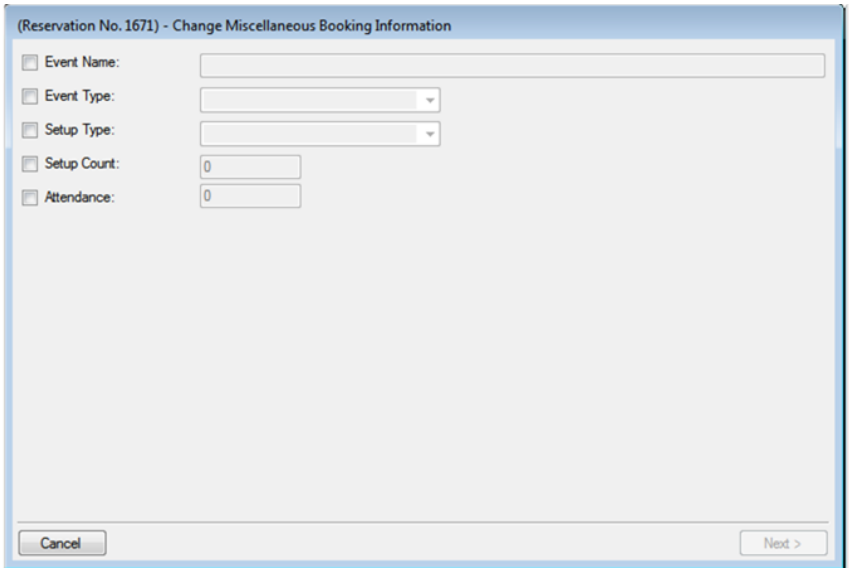


9. Click Close to return to the Navigator.

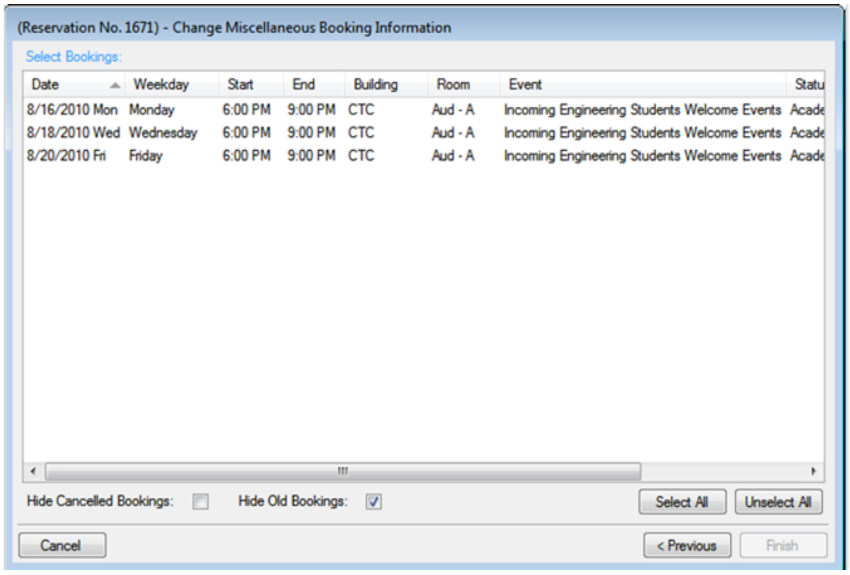
Change Miscellaneous Information

For multiple bookings, you can batch-change 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.



2. Select the information to change, enter new values, and then click Next. The Select Bookings window shows the bookings to which you can apply these changes.



3. Select bookings to which to apply the changes 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.

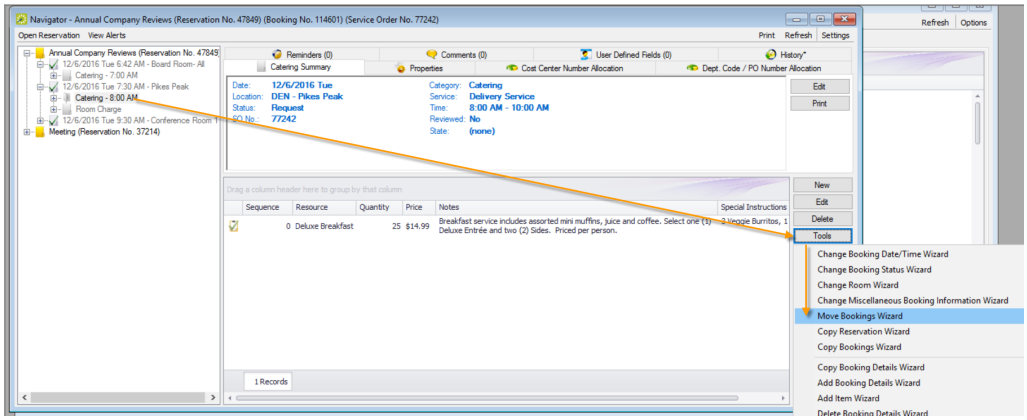
CHAPTER 200: Move Bookings to a Different Reservation in the Navigator

You use the Move Bookings Wizard 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.

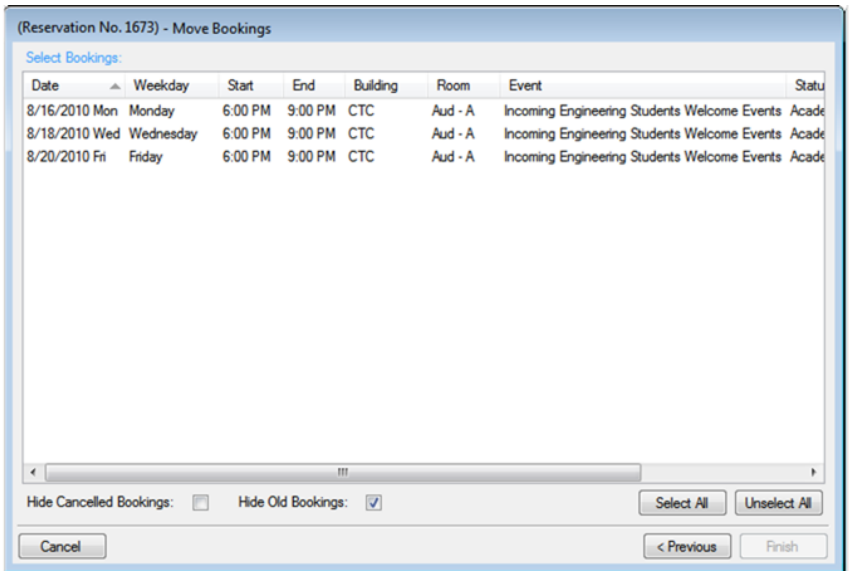
Note:

When you move a booking, the booking and all its associated details are removed entirely from the original reservation.

1. Open the reservation in the Navigator.
2. In the left pane of the Navigator, select the reservation from which you are moving the bookings. In the pane on the right, click Tools, and then click Move Bookings Wizard.



3. The Move Bookings Wizard opens with the option to move the bookings to an Existing Reservation pre-selected. You can enter the reservation number of an Existing Reservation or start a New Reservation.
4. Click Next. The Select Bookings window displays, listing the bookings for the selected reservation that do not have invoiced items.



Note:

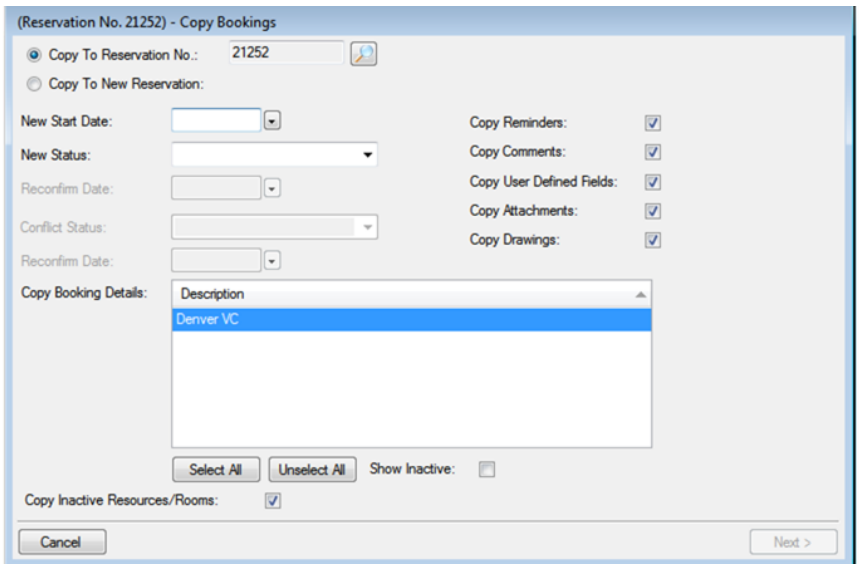
You can use the Hide Canceled Bookings and Hide Old Bookings options to adjust the list.

5. Select the booking(s) you want to move to the new or existing reservation (you can 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, which now shows both the old reservation and the new or existing reservation in the left pane of the Navigator. Any conflicts that arise are indicated in the Navigator.

CHAPTER 201: Copy 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.

1. Open the Navigator.
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 with Copy to Reservation No. automatically selected; the number for the reservation from which you are copying the bookings is displayed in the field.

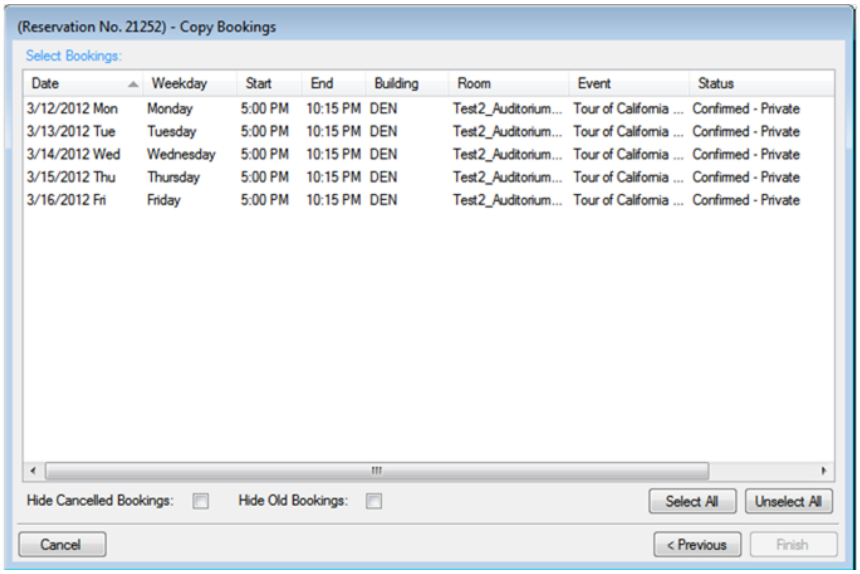


4. You can copy the bookings to an existing reservation (click the Search icon to search for the reservation) or copy the bookings to a new reservation (click Copy to New Reservation).
5. Enter the information for the reservation to which you are copying the bookings.

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.

Information	Description/Comments
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, listing all the bookings for the copied reservation, regardless of the date or status.



Note:

You can use the Hide Canceled Bookings and Hide Old Bookings options to adjust the data. The start date you specify 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 12/18, then the existing or new reservation has three bookings with dates of 12/15, 12/22, and 12/29.

7. Select the booking(s) that you want to copy to the existing or new reservation (you can click Select All to select all the displayed bookings in a single step), and then click Finish. A message confirms that the changes were made successfully.

Note:

When you copy multiple bookings, they are simply copied and pasted "as-is": bookings are not moved to a different location. If you need to move a booking to a different location, see Change Rooms for Multiple Bookings.

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.

CHAPTER 202: 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.

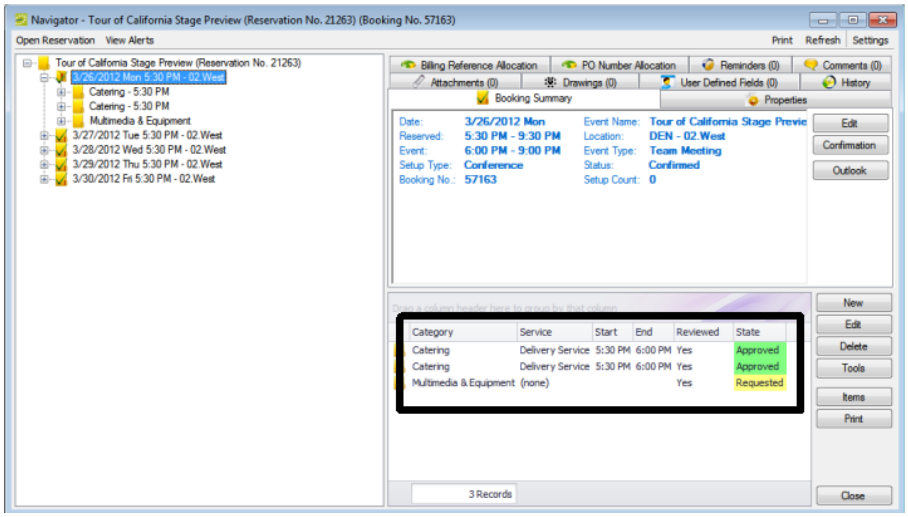
Note:

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.

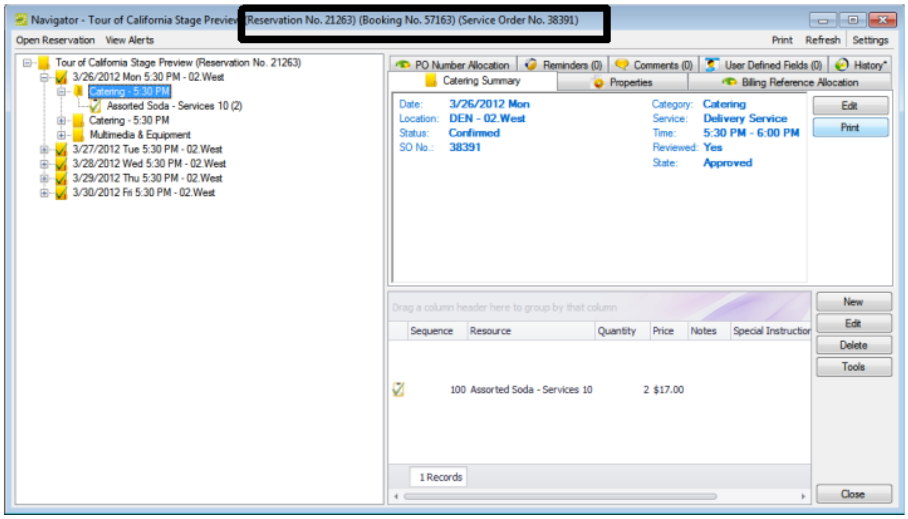
Note:

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."



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.



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.

- **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 Also: Allocating charges to multiple billing reference numbers and/or PO numbers.

> **Note:**
> Your EMS administrator must enable the **Use Billing Reference Allocation** parameter for this tab to be displayed. See EMS Desktop Client Parameters.

- **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 Also: Allocating charges to multiple billing reference numbers and/or PO numbers.

> **Note:**
> Your EMS administrator must enable the **Use PO Number Allocation** parameter for this tab to be displayed. See Also: EMS Desktop Client Parameters.

Service Order

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 Also: User Defined Fields in the Navigator.
- **Reminders** tab—The Reminders tab displays any reminders that were created for the selected booking detail. See Also: Comments and Reminders in the Navigator.
- **Comments** tab—The Comments tab displays any comments that were made for the selected booking detail. See Also: Comments and Reminders in the Navigator.
- **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).

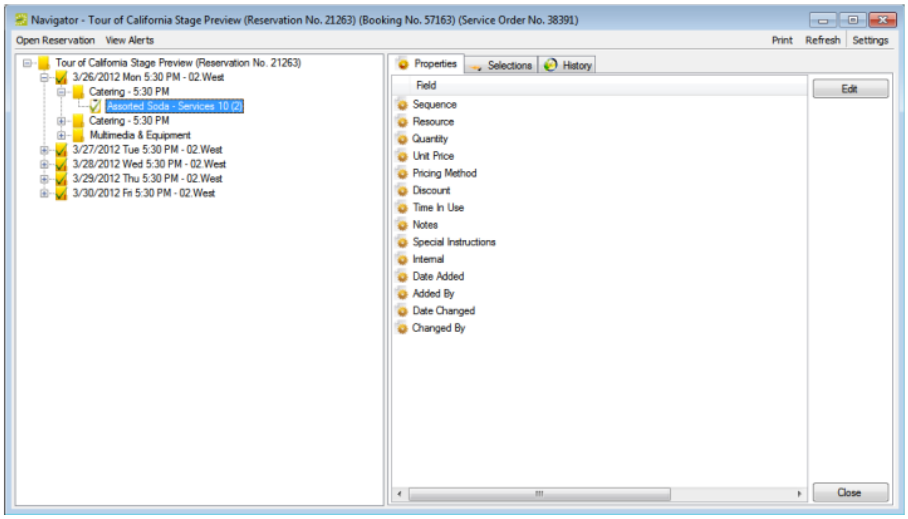
Also, when you select a booking detail folder:

- 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 Also: EMS Browser Window.

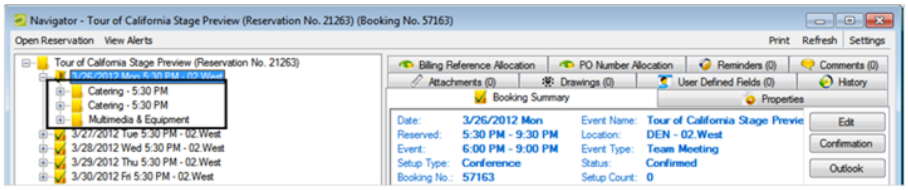
- The booking detail items for the selected booking detail are displayed in the Items pane (the lower right pane) of the Navigator. A green check mark appears in front of each individual item that has been added to a booking. If the item is a package, then a green checkmark is displayed not only in front 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 Also: EMS Browser Window.

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—**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.



The Navigator window with a booking detail item selected

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.



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.

Note:

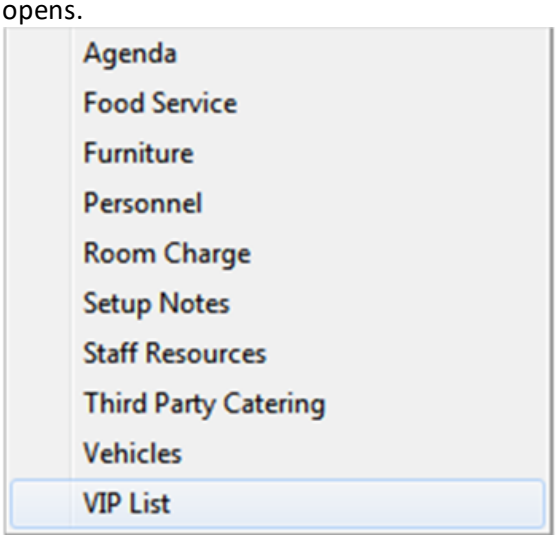
Your EMS administrator might have configured a default service type for some or all of your system's categories, but you can always select a different value. In addition, your EMS administrator might have configured states to manage your service order process. For detailed information about states, see Configure Categories.

CHAPTER 203: Add 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, follow these steps:

1. Open the reservation in the Navigator. Refer to the following for directions:
   - Opening a reservation directly in the Navigator
   - Opening a reservation through the Reservation Book
   - Opening a reservation through a group
   - Open a reservation through a search
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.

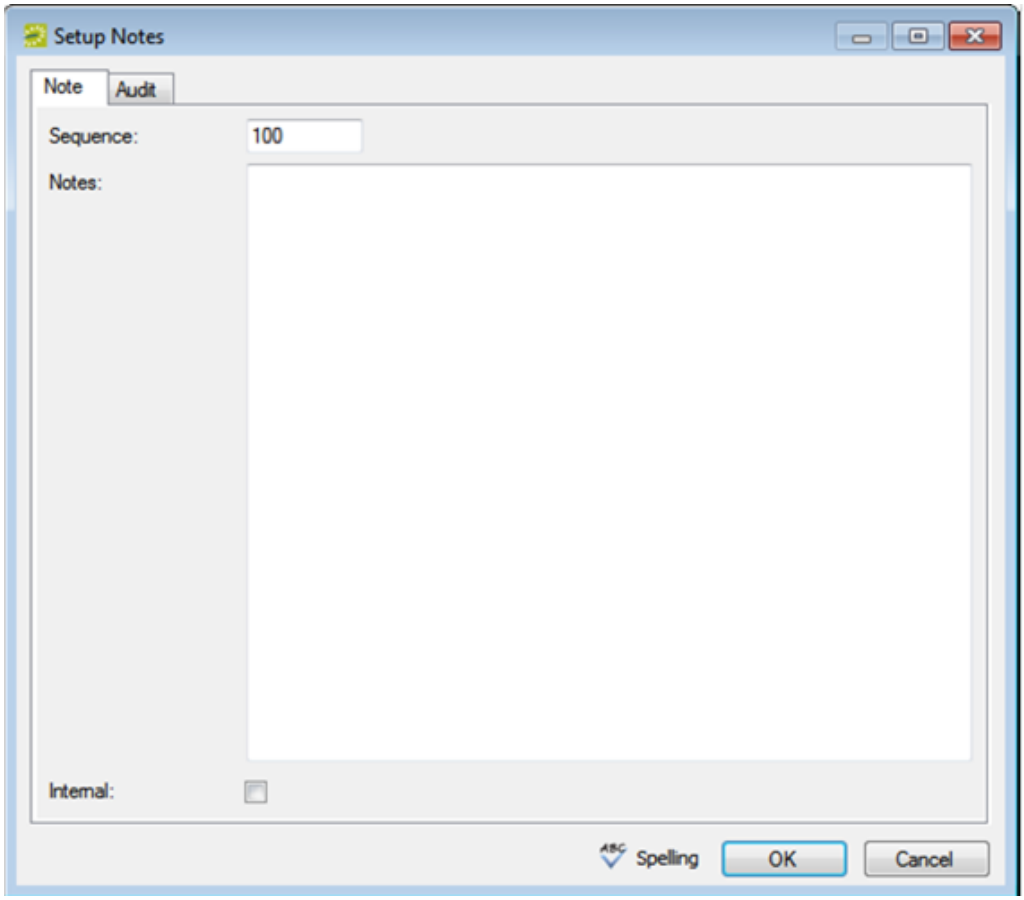


4. Select the booking detail that you are adding to the booking. A dialog box opens.
5. Continue to one of the following:
   - Add a booking detail from a non-resource category
   - Add a booking detail from a resource, service order, or catering category

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.

Add Setup Notes



1. Enter the sequence number for the setup notes.

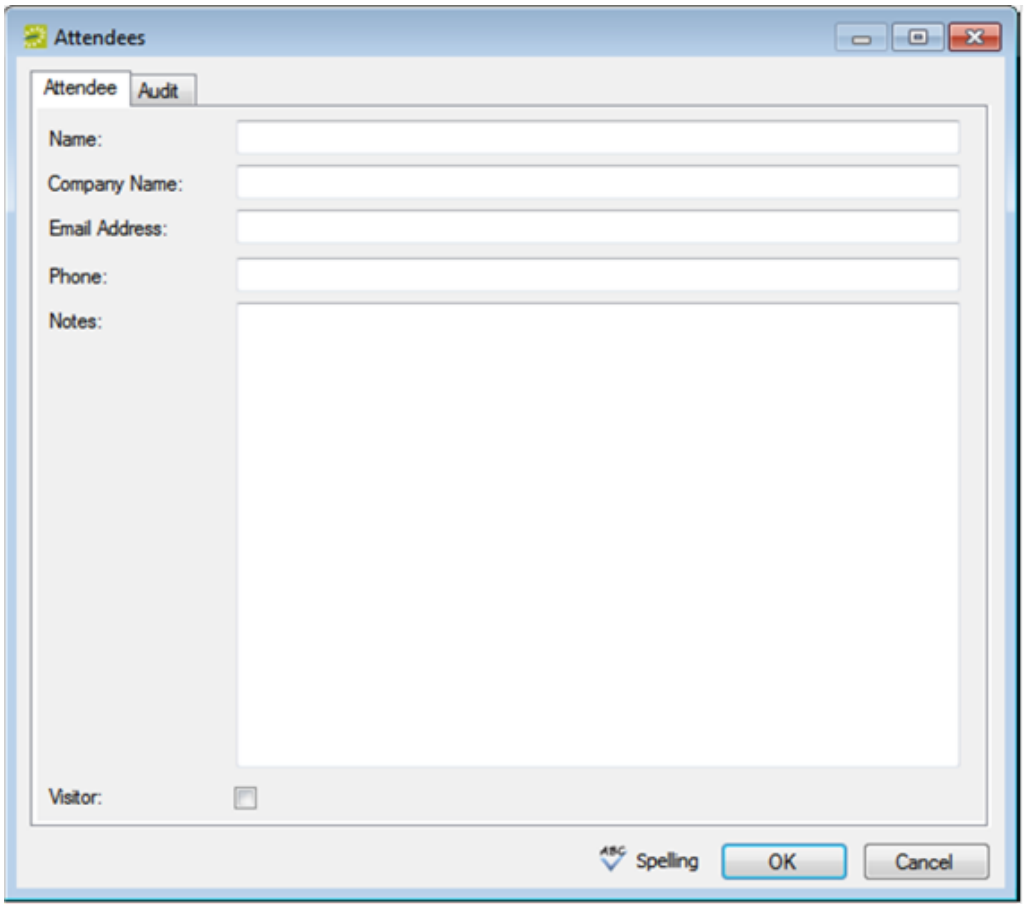
> **Note:**
> The sequence number determines the order in which the notes are displayed in the Items pane in the Navigator when the booking detail (Setup Notes) is selected for a booking.

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.

> **Note:**
> After you add setup notes for the first time to a booking, Setup Notes is no longer an available option on the Booking Details drop-down 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**.

Add Attendees



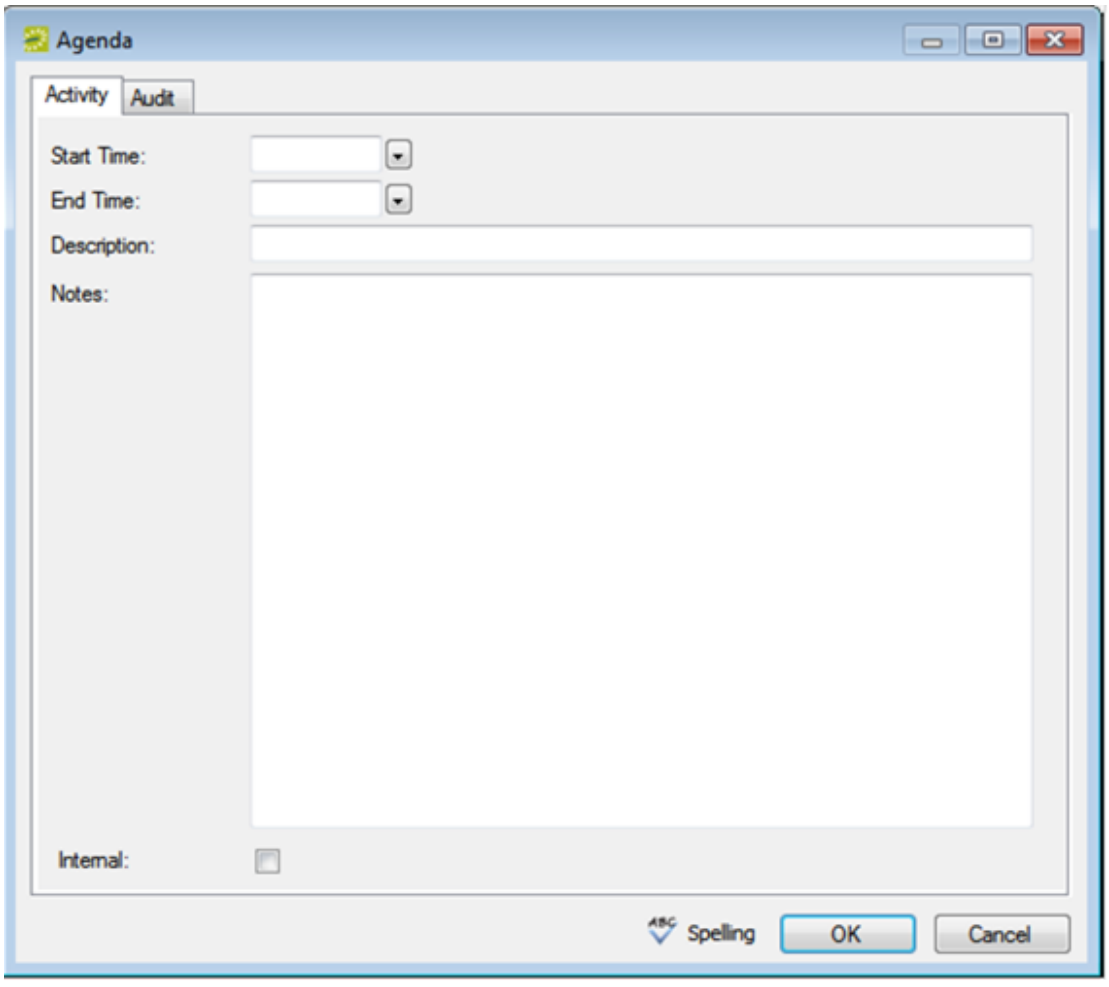
Attendees dialog box

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.

> **Note:**
> 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 drop-down 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**.

Add an Agenda (Activities)



Agenda dialog box

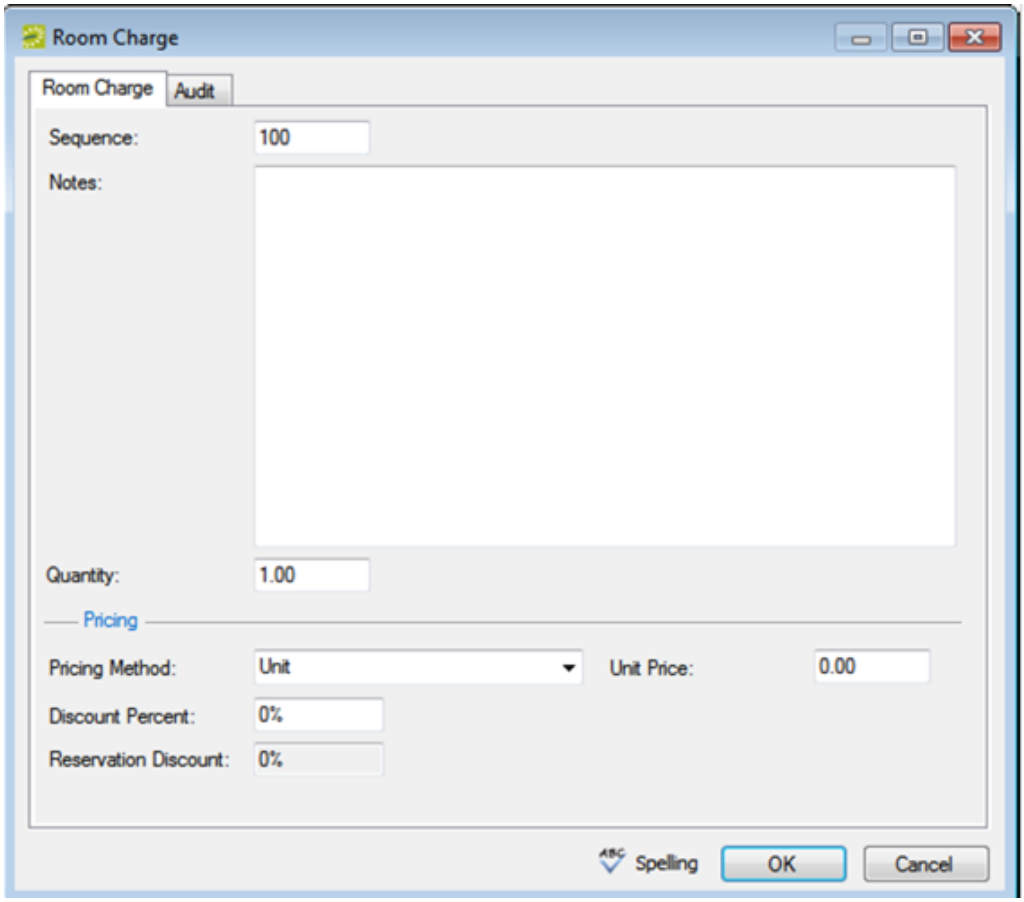
1. Enter the start time, the end time, and a description for the agenda.
2. Optionally, in the Description field, enter a name or description for the agenda.

> **Note:**
> 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.

> **Note:**
> 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 drop-down 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**.

Add a Room Charge



1. Enter the sequence number for the room charge.

> **Note:**
> 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.

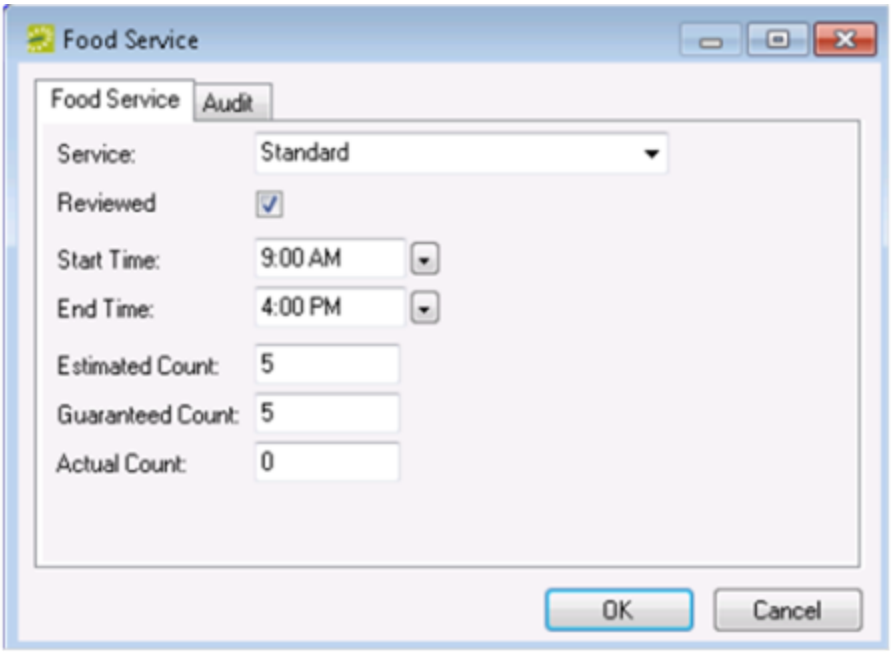
Pricing Method	Additional Fields
Unit	Unit Price
Half Day/Full Day (Event Time)	Half Day Price Full Day Price Hours
Half Day/Full Day (Reserved Time)	Half Day Price Full Day Price Hours
Hourly (Event Time)	Hourly Price Minimum Charge Maximum Charge Initial Flat Charge
Hourly (Reserved Time)	Hourly Price 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.

Note:
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 drop-down 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**.

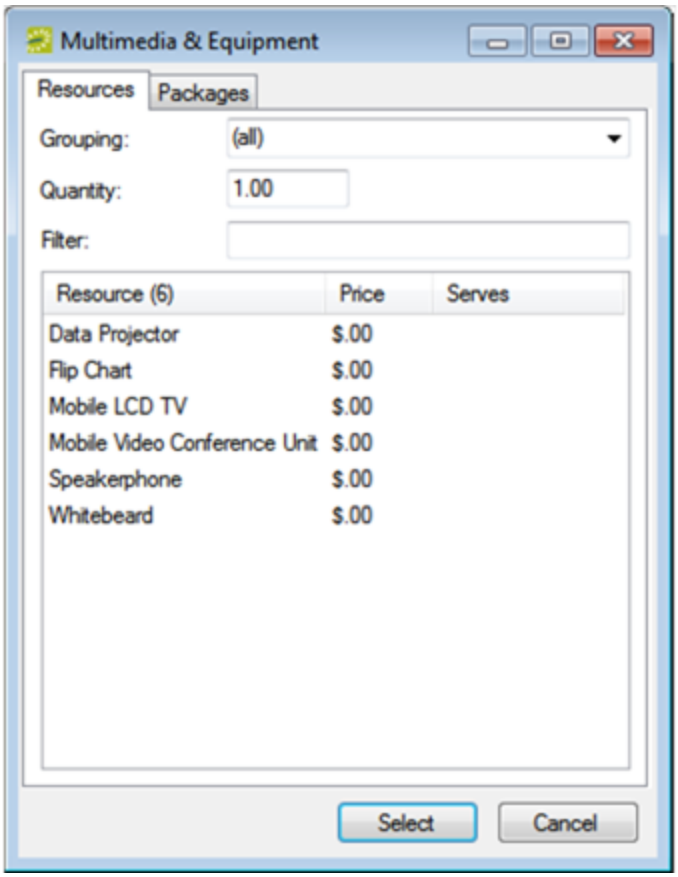
Add a Booking Detail from a Resource, Service Order, or Catering Category

- 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 below.



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.



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.

> **Note:**
> For more information about reviewing service orders and selecting states, see also: Search for Service Orders.

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 drop-down 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.

> **Note:**
> 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 coffee service, conference phone, and mini-copier.

7. In the Quantity field, leave the default value of 1.00; otherwise, enter a new value.

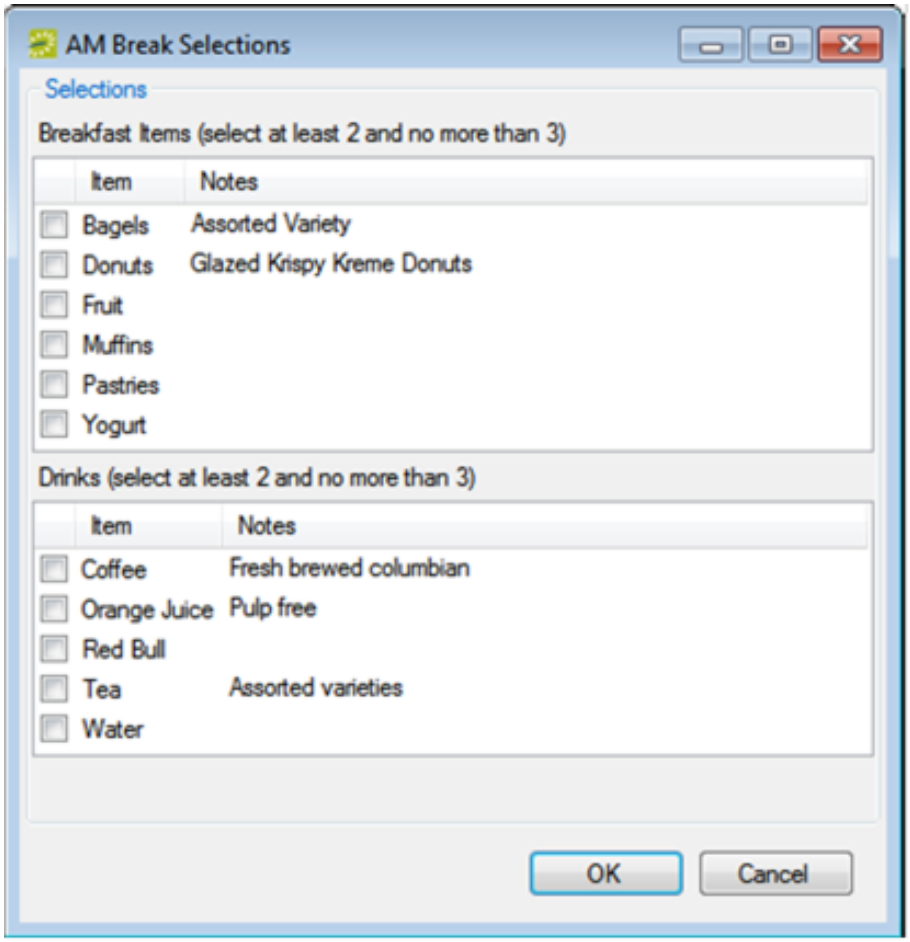
> **Note:**
> If you change the quantity for a resource package, then the quantity for each individual resource that makes up the package is also changed.

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.

> **Note:**
> 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; otherwise, go to Step 10.



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.

Note:

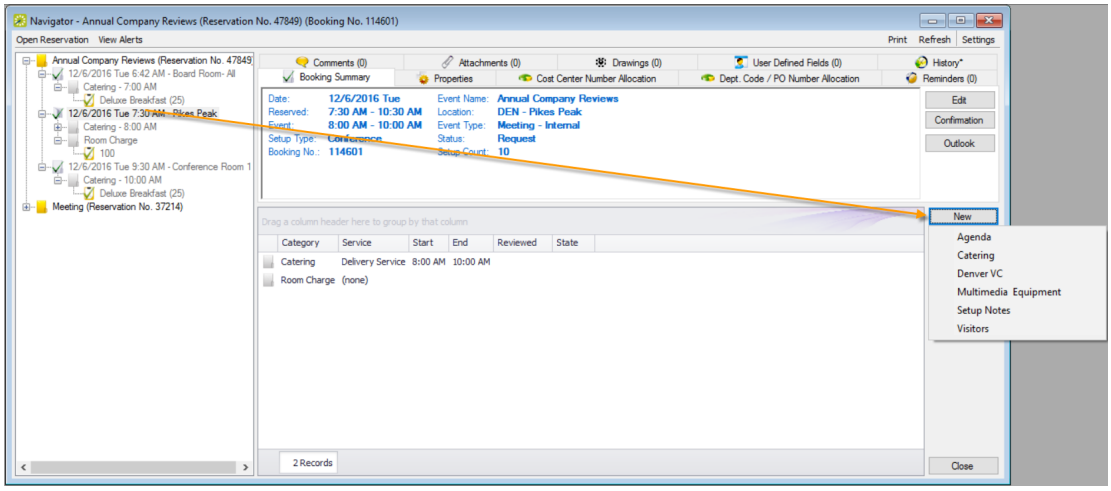
If you close the Resource Selection dialog box before you have added all the needed resource items to the booking, and the booking detail is not from a catering or service order category, then the booking detail is no longer an available option on the Booking Details drop-down list. To add more resource 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**.

CHAPTER 204: Add Booking Details and Items to Existing Bookings

The steps that you follow to add booking details and items to individual bookings depend on the category of the item. You can only add an item more than once to a booking if it is a Resource with Service Order or Catering item.

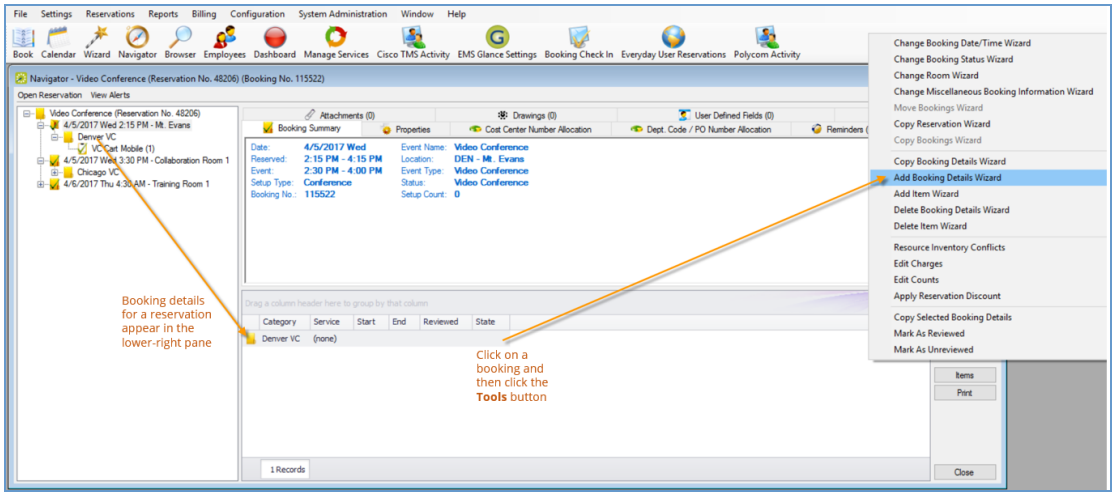
1. Open the Navigator.

2. In the left pane of the Navigator, expand the folder structure for the reservation until the appropriate booking folder is visible, select the booking folder, and then in the Booking Details pane, click New. The Booking Details list opens.



Note:

You can also add booking details and items after the first one has been added by clicking on the booking and then clicking the Tools menu. This launches a menu with wizards to streamline the process of working with many types of details for the booking.



You can even use the Add Booking Details Wizard to add booking details and items to multiple bookings in a single step, and you can add the same detail (for service order and catering categories) to multiple bookings. The steps that you follow depend on the category type and how your Administrator has configured your system.

You can also copy booking details and items from one booking to another: right-click on the booking detail and click **Copy**. Then right-click on the booking to which the booking detail is being copied and click **Paste**.

3. Select the type of item you want to add to the booking.
4. Continue to the appropriate subtopic below:
   - Add a Non-Resource Item
   - Add a Resource, Service Order, or Catering Item

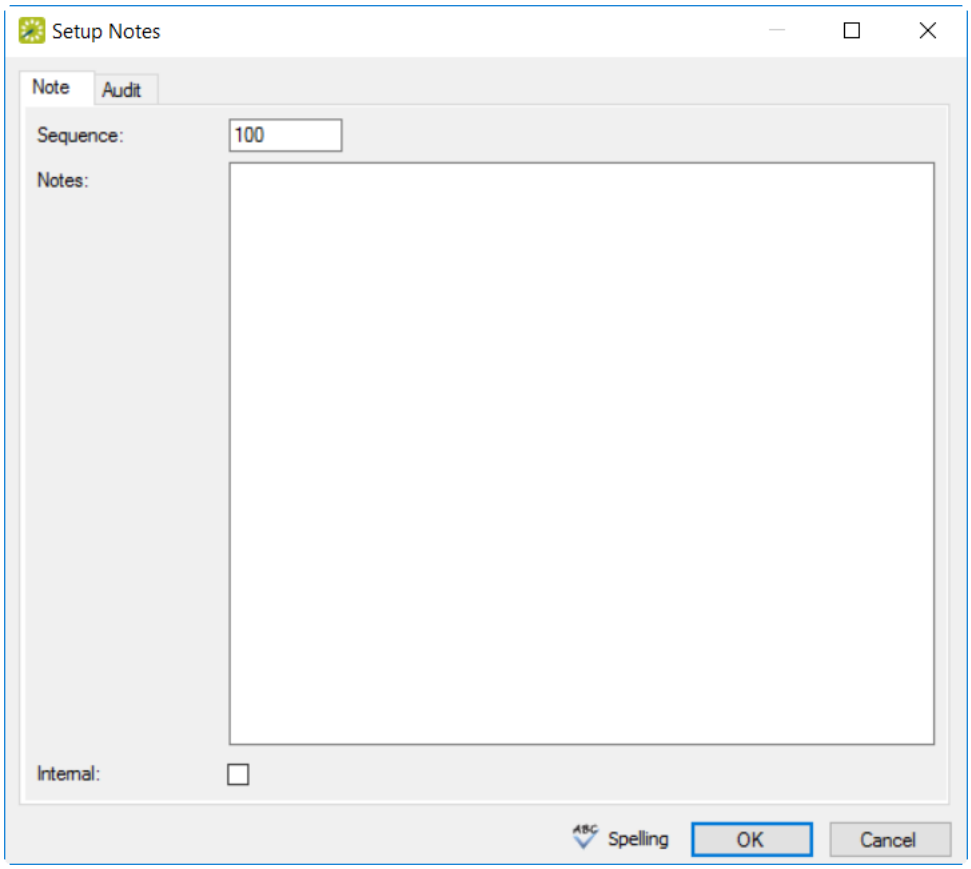
Add a Non-Resource Item

Non-resource items include:

1. Setup Notes
2. Attendees and Visitors
3. Agenda (Activities)
4. Room Charges

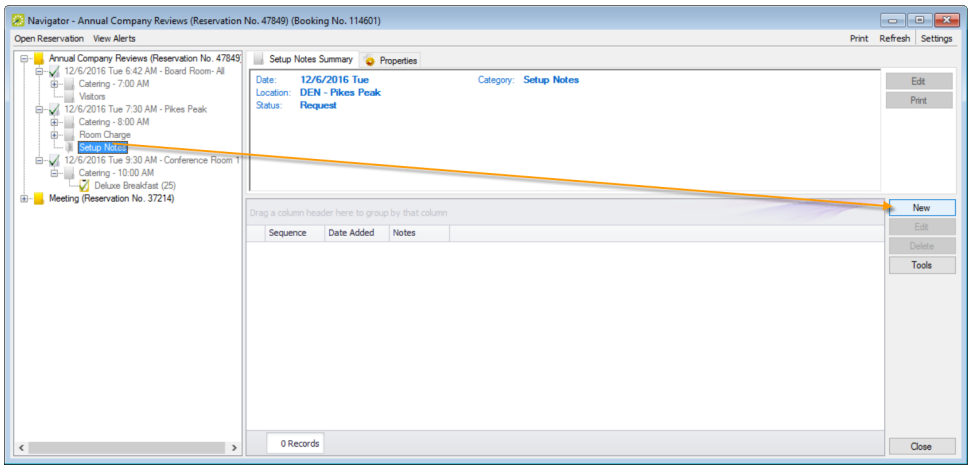
Add Setup Notes

1. Select Setup Notes from the New menu, so you can new setup notes for the booking.



2. Enter the sequence number for the setup notes, which determines the order in which the notes are listed in the Items pane in the Navigator.
3. Enter notes or comments. If you want these notes to be printed on internal reports only (the notes would be excluded from external reports like a confirmation), select the Internal checkbox.
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.

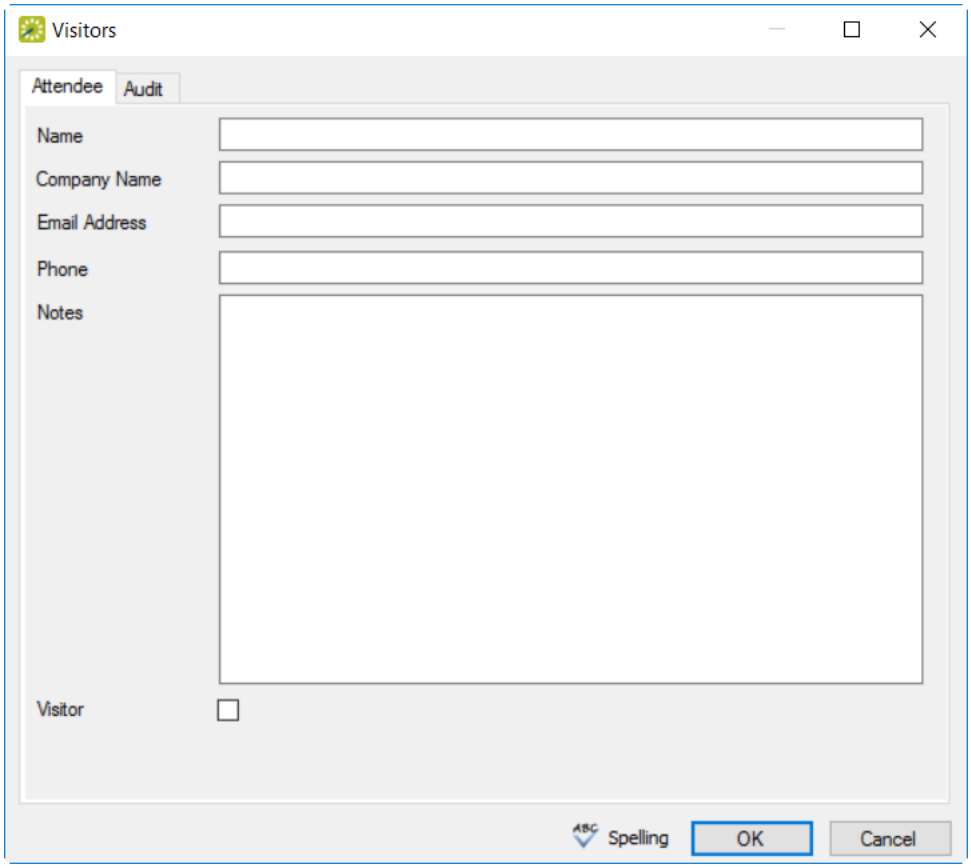
> **Note:**
> After you add setup notes for the first time to a booking, Setup Notes is no longer an available option on New menu. To add more setup notes to the booking, expand the folder hierarchy for the booking until you see existing Setup Notes, click on one, and then click New.



Add Attendees and Visitors

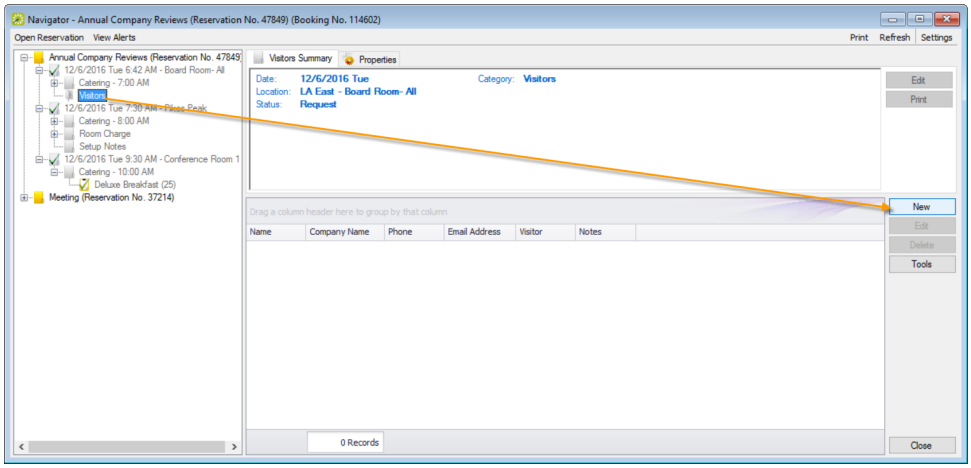
Visitors are non-registered attendees who are not already in your EMS database, such as temporary building guests.

1. Select Visitor from the New menu so you can add attendees and visitors to the meeting. At a minimum, you must enter the visitor name.



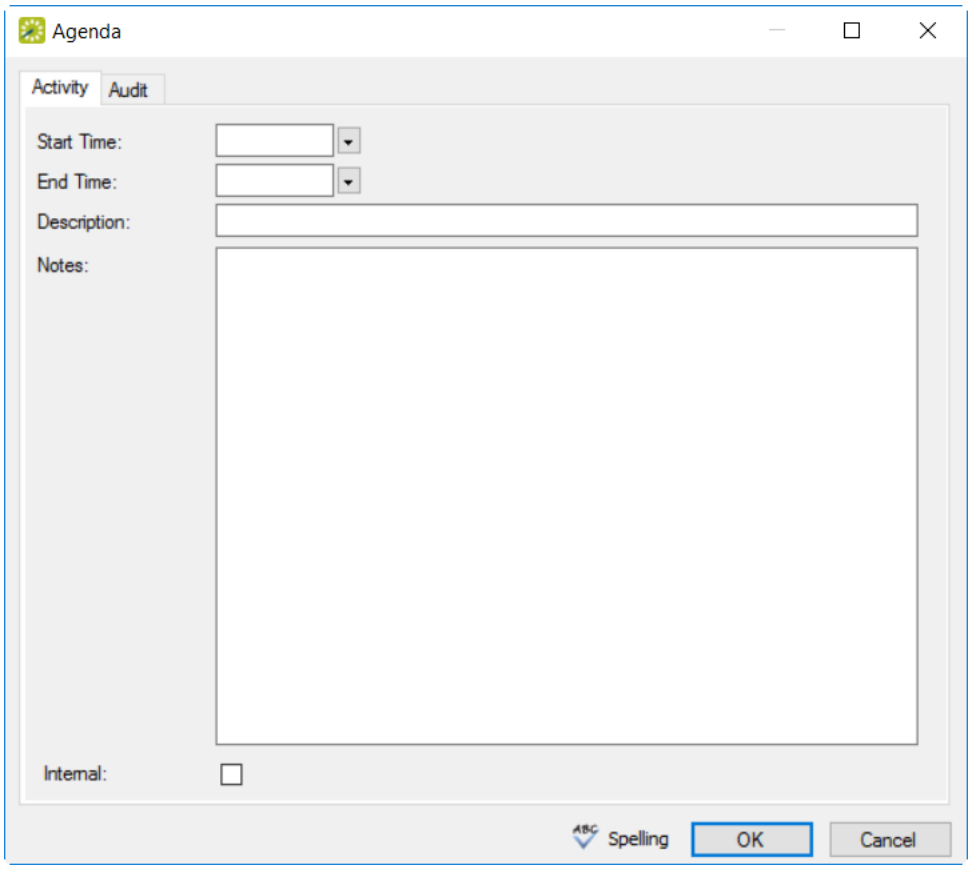
2. You can select the Visitor option to flag attendees who are not registered for the event.
3. Click **OK**. The dialog box remains open.
4. Repeat Steps 1 through 3 until you have added all the needed attendees/visitors to the booking.
5. Click **Cancel** to return to the Navigator window.

> **Note:**
> If you close the Attendees dialog box before you have added all the needed attendees/visitors to the booking, Attendees is no longer an available option on New menu. To add more attendees/visitors to the booking, expand the folder hierarchy for the booking until you see existing Attendees/Visitors, click on one, and then click New.



Add an Agenda (Activities)

1. Select Agenda from the New menu so you can add agendas to the meeting. Enter the information for the agenda.



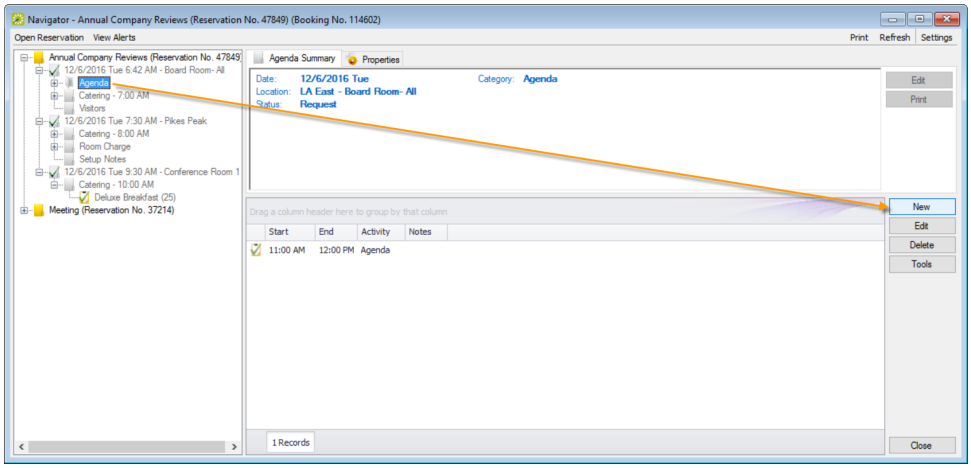
2. Enter the start time, the end time for the agenda. You can enter a name or description for the agenda (maximum of 50 characters, including spaces) in the Description field. If you want these notes to be printed on internal reports only, select Internal.

3. Click OK. The Agenda dialog box remains open.

4. Repeat Steps 1 through 4 until you have added all the needed agendas.

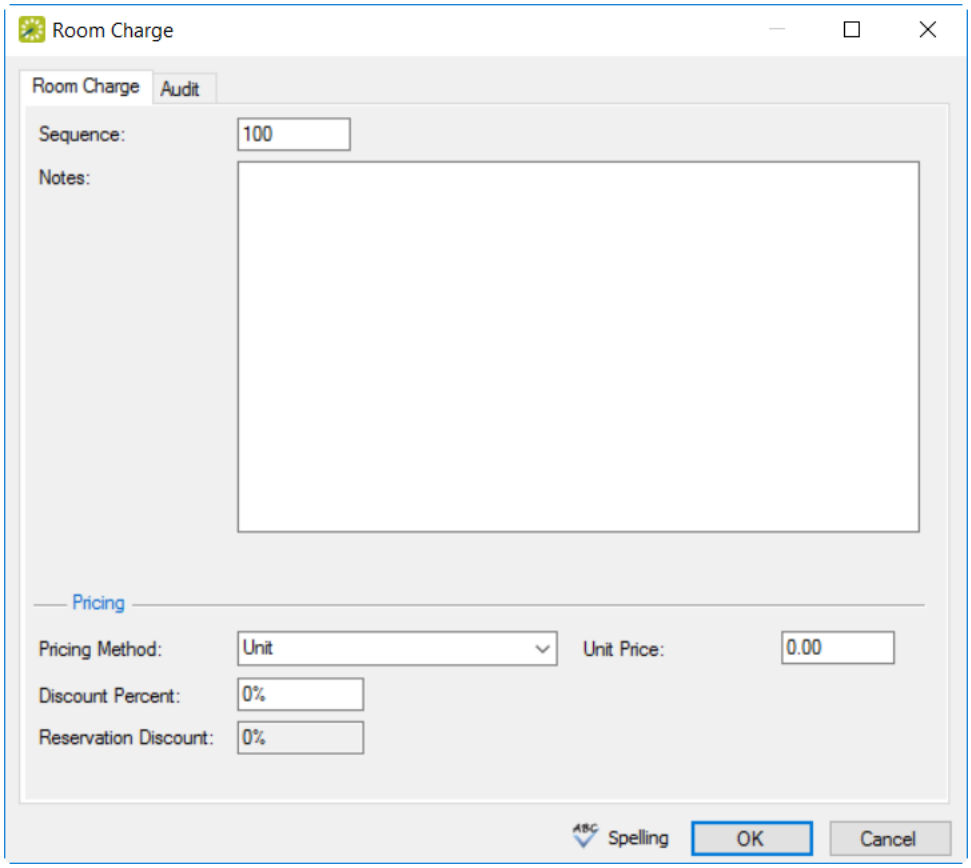
5. Click Cancel. The Agenda dialog box closes. The booking detail and its items are displayed as folders under the Booking folder in the Navigator window.

> **Note:**
> If you close the Agenda dialog box before you have added all the needed attendees/visitors to the booking, Agenda is no longer an available option on New menu. To add more agendas to the booking, expand the folder hierarchy for the booking until you see existing agendas, click on one, and then click New.



Add a Room Charge

1. Select Room Charge from the New menu so you can add room charges to the meeting. Enter the information for the agenda.



2. Enter the Sequence Number for the room charge, which determines the order in which the charges are listed in the Navigator. You can enter notes or comments about the room charge. If needed, edit the quantity.

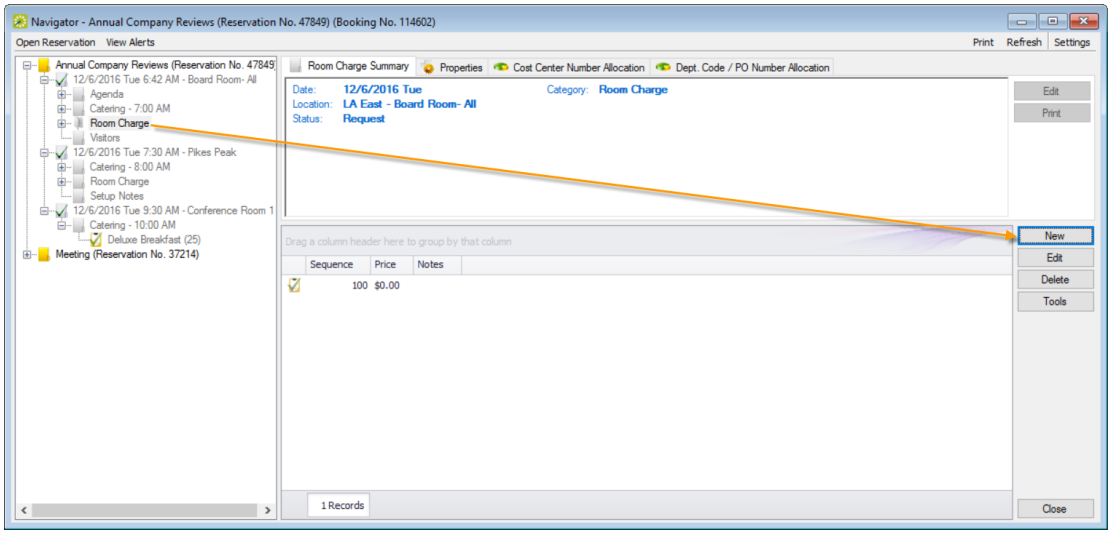
3. Select the appropriate pricing method, and then enter any other additional information as needed after you select a pricing method:

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

Pricing Method	Additional Fields
	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

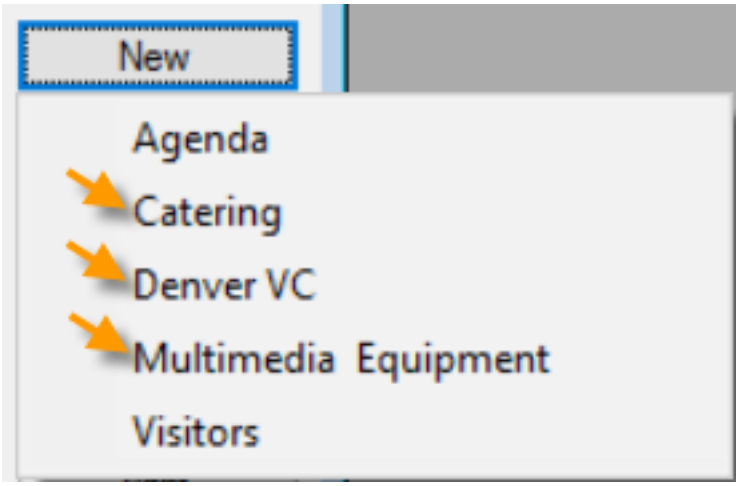
4. You can enter a discount percent and/or a reservation discount.
5. Click OK to return to the Navigator window.

Note:
If you close the Room Charge dialog box before you have added all the needed attendees/visitors to the booking, Room Charge is no longer an available option on New menu. To add more room charges to the booking, expand the folder hierarchy for the booking until you see existing room charges, click on one, and then click New.

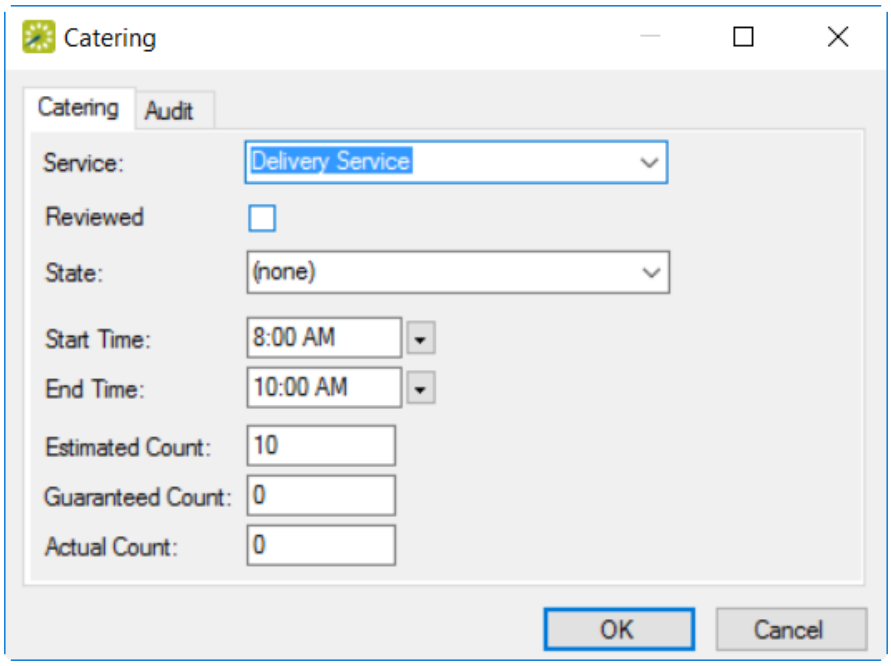


Add a Resource, Service Order, or Catering Item

1. From the New menu, select a resource, service order, or catering item, such as the examples shown below.



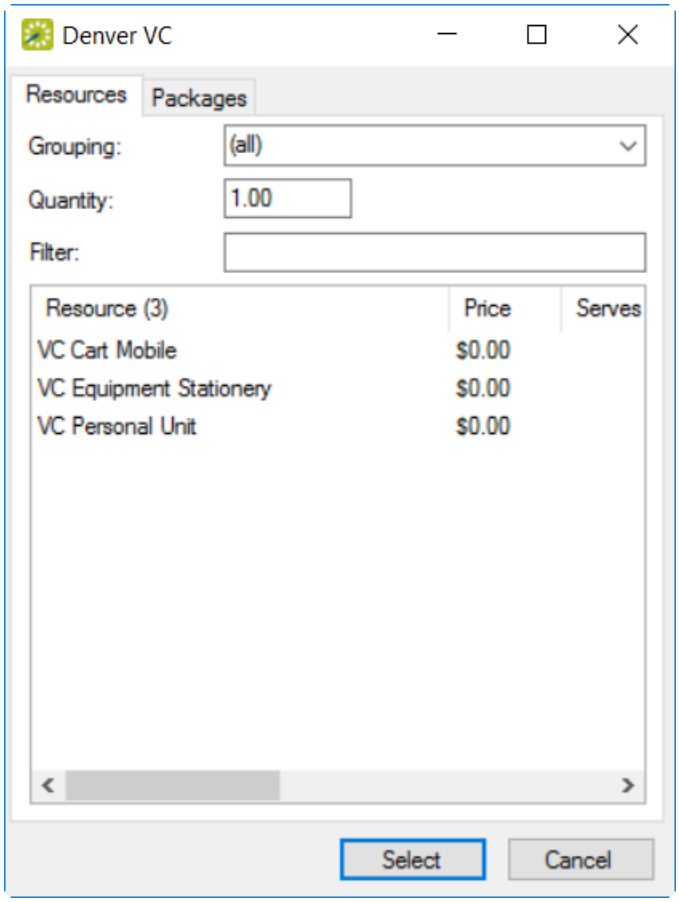
- If you add a service order or catering item from the New menu, a Service Order dialog box opens with, at a minimum, options for Service, Reviewed, Service Start Time, and End Time. For catering items, additional fields display for you to enter Estimated, Guaranteed and Actual Counts.



Example of a Service Order dialog box for a catering category

Note:
Select the Service type and enter the Start Time. You can enter additional fields as needed.

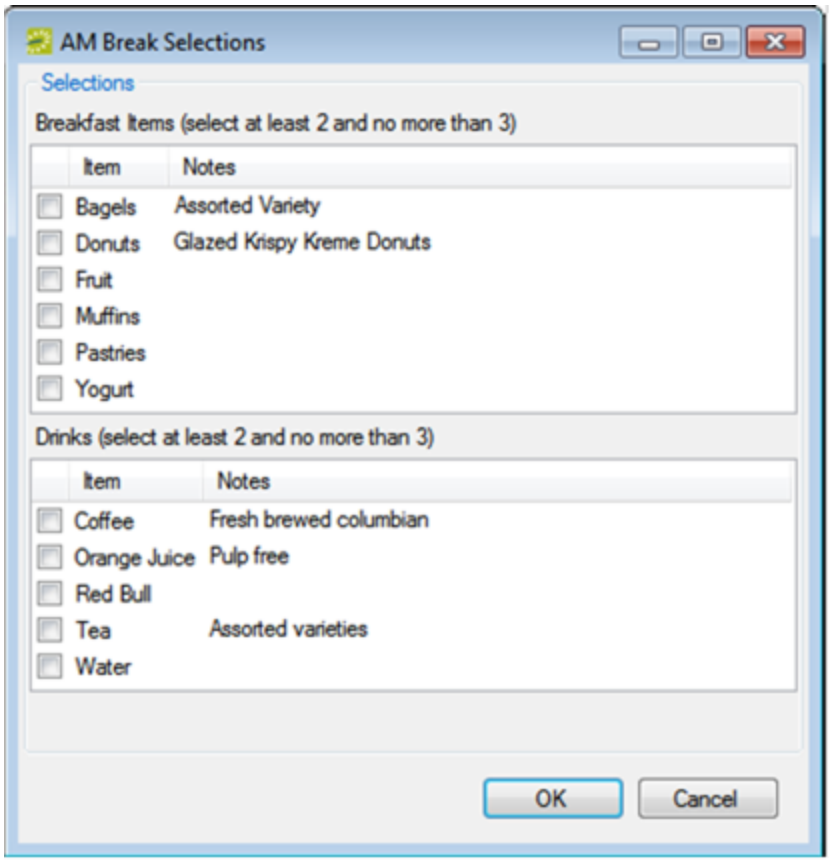
- If you select a resource category item, then a Resource Selection dialog box opens, where you select resources to add to the booking.



Example of a Resource Selection dialog box, Resources tab

Note:

Your EMS administrator might have configured an override resource (also known as an Override Description) so 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. Furthermore, you might be able to select variations for an item.



Example of a Resource Selections Dialog Box

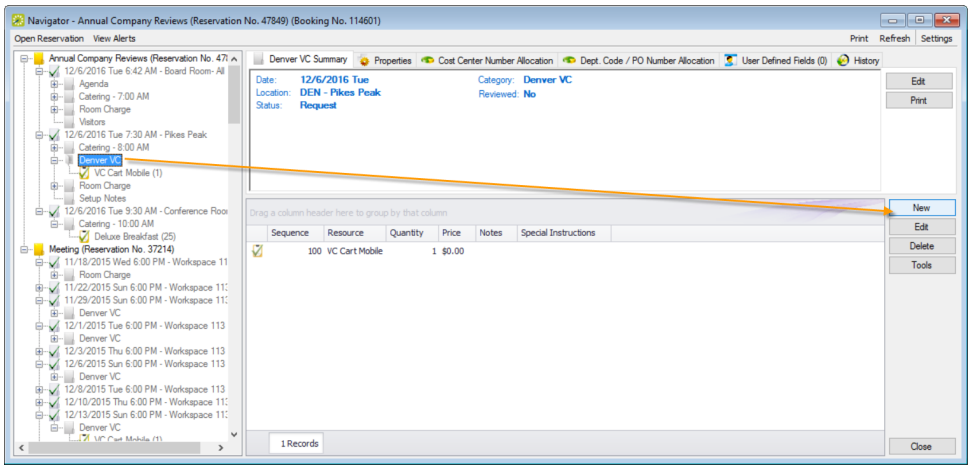
You can use the Grouping drop-down list to search for available items in a specific grouping, such as A/V Equipment. In the Filter field, you can add a keyword for the search.

To add multiple resources as a "Package" to the booking in a single step, click the Packages tab, choose a package, and specify how many packages to add Quantity field. If you change the quantity for a resource package, the quantity for each individual resource that makes up the package is also changed.

2. Once you have chosen items to add to the booking, click Select.
3. Repeat steps to add more items.
4. Once finished, click **Close** to return to the Navigator.

Note:

If you close the dialog box before you have added all the needed items to the booking, they no longer an available option on New menu. To add more items to the booking, expand the folder hierarchy for the booking until you see existing items, click on one, and then click **New**.



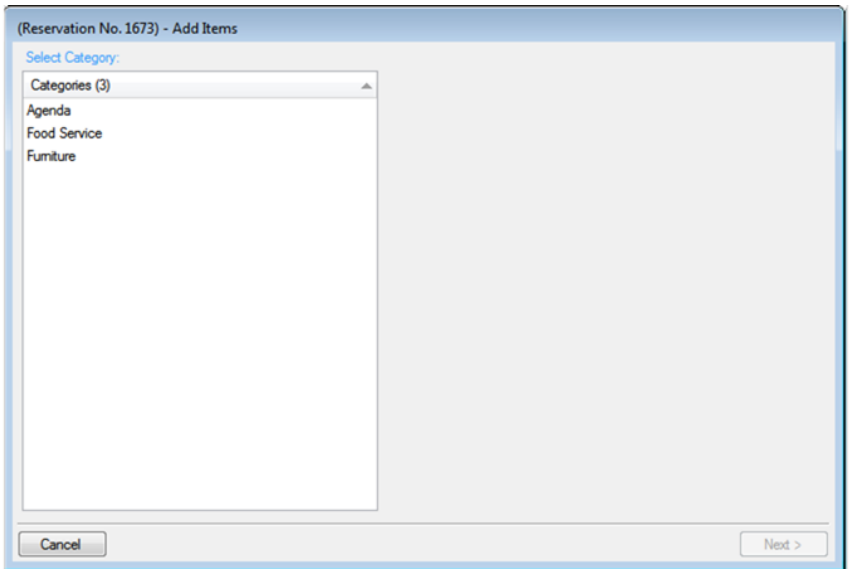
Navigator Dialog

CHAPTER 205: Add 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 detail items to multiple bookings, follow these steps:

1. Open the reservation in the Navigator. See Also:
   - Opening a reservation directly in the Navigator
   - Opening a reservation through the Reservation Book
   - Opening a reservation through a group
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.



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 Also:

- Add a Booking Detail from a Non-Resource Category
- Add a Booking Detail from a Resource, Service Order, or Catering Category

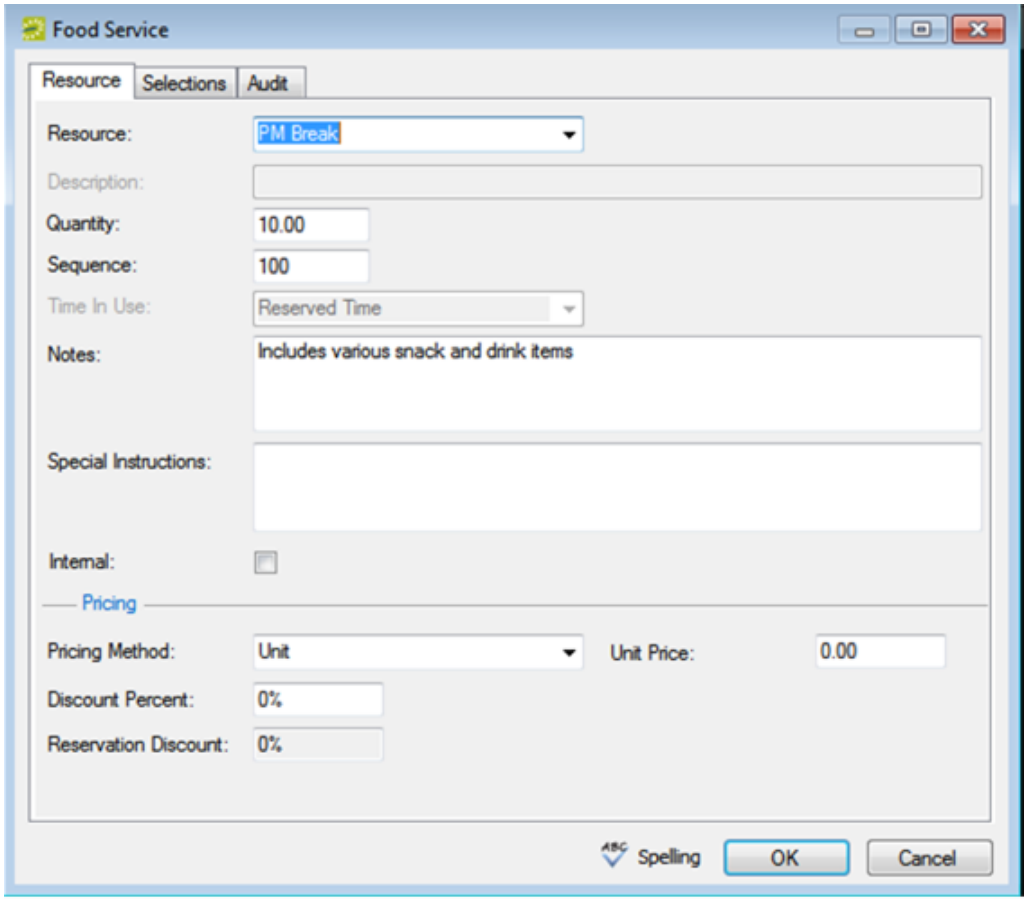
CHAPTER 206: Edit Items for Individual Bookings

To edit items for individual bookings, follow these steps:

1. Open the Navigator.
2. Select the booking detail folder that contains the items that you want to edit.
3. In the Items pane, select the item you want to change.

> **Note:**
> 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.

4. Click **Edit**.
   - If editing a non-resource item, the Booking Detail dialog box opens. Edit the item as necessary, and then click **OK** to return to the Navigator.
   - If editing a resource item, the Resource dialog box opens on the **Resource** tab. You might also see a **Selections** tab. Edit the information as necessary.



Note:

You can select a different item for the resource. Sequence determines the order in which the items (for example, juice, muffins, and so on) are displayed in the Items pane in the Navigator.

Time in Use indicates the time that the resource is to be available for the booking. You only can edit the **Time In Use** 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.) See Also: Event Timeline.

5. If you want for notes to be printed on internal reports only, select **Internal**.
6. If you edit the pricing method, enter information as needed:

Pricing Method	Additional Fields
Unit	Unit Price

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 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
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

Pricing Method	Additional Fields
	Minimum Charge Maximum Charge

7. If applicable, open the **Selection** tab, and edit the resource selections as needed.
8. Click **OK**. The dialog box closes, and you return to the Navigator with the edited item still selected in the Items pane.

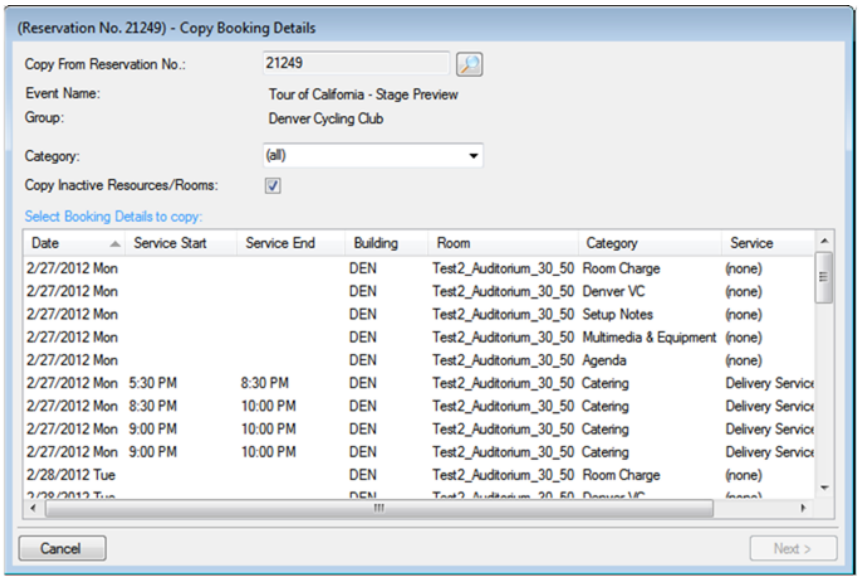
Note:
If you need to edit counts and/or times for individual items in a resource, service order, or catering, category, see Edit Count Information for a Booking.

CHAPTER 207: Copy 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, follow these steps:

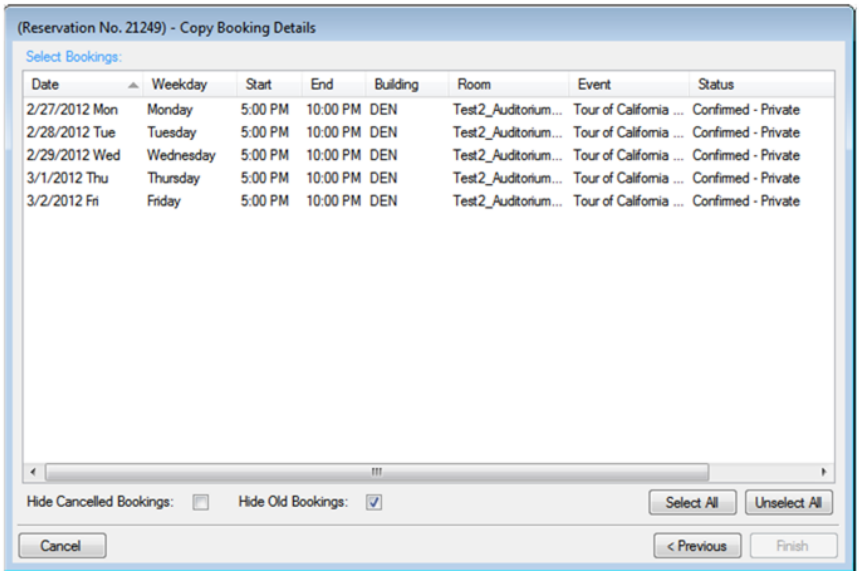
1. Open the reservation to which you are copying the booking details in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
2. In the left pane of the Navigator, select the reservation from 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.



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 drop-down 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.



Note:

To show canceled bookings, clear **Hide Canceled Bookings**. Conversely, to hide canceled bookings, select **Hide Canceled Bookings**. To show all bookings regardless of date, clear **Hide Old Bookings**.

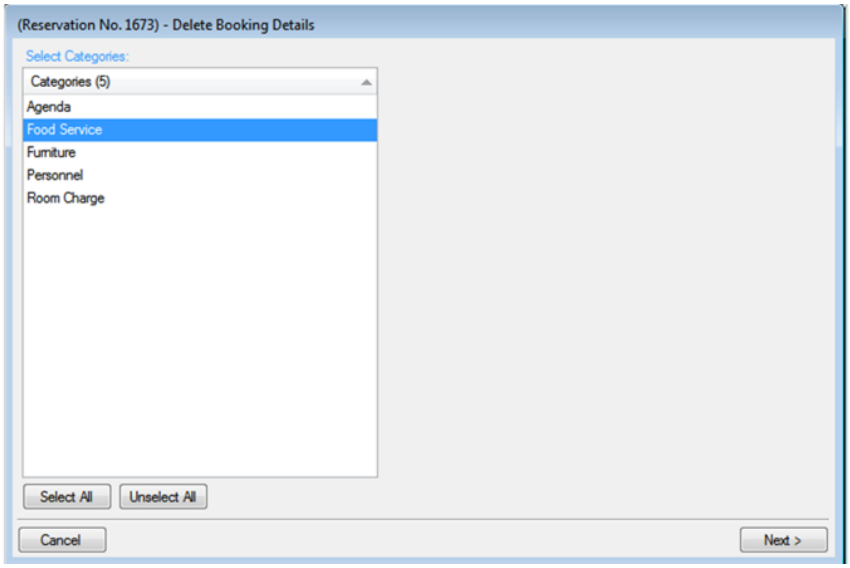
7. Select the booking, or CTRL-click to select the multiple bookings to which you are copying the booking details, or click Select All to select all the displayed bookings in a single step, and then click **Finish**. A message opens indicating that the changes were made successfully.
8. Click **OK** to close the message and return to the Navigator.

CHAPTER 208: Delete Booking Details from Multiple Bookings

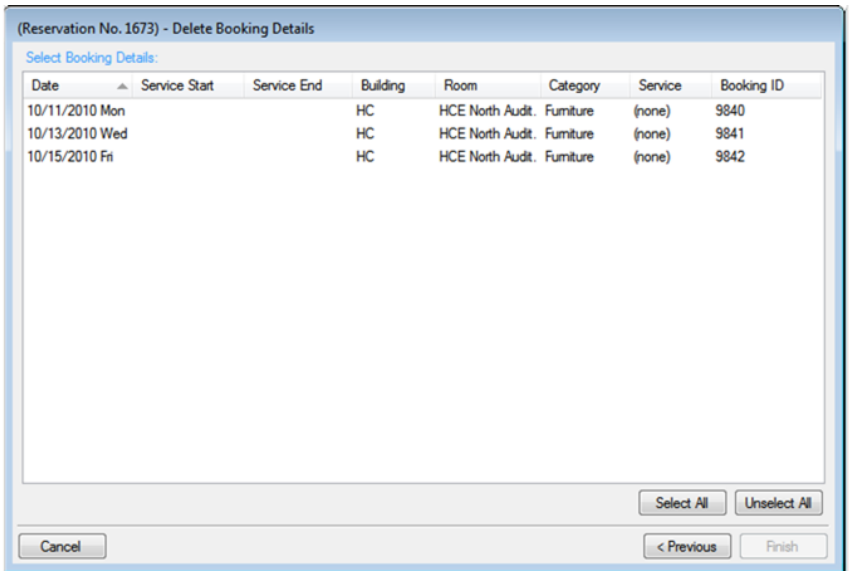
You use the Delete Booking Details Wizard to delete one or more booking details that do not have invoiced items from multiple bookings in a single step. When you delete a booking detail from a booking, any items that have been added for the detail are also deleted.

To delete booking details from multiple bookings, follow these steps:

1. Open the reservation from which you are deleting the booking details in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
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.



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.



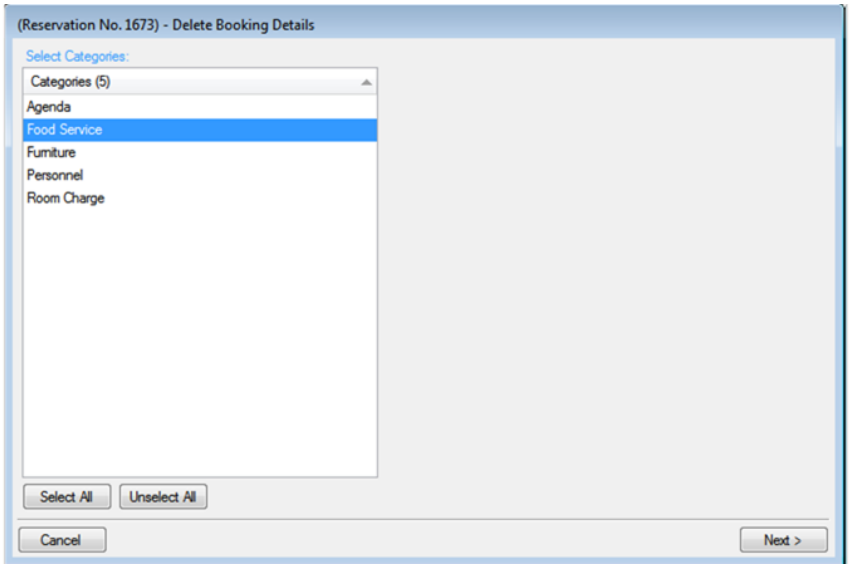
6. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the categories, or click **Select All** to select all the displayed bookings in a single step, and then click Finish. A message appears indicating that the changes were made successfully.
7. Click **OK** to close the message and return to the Navigator.

CHAPTER 209: Delete Booking Details from Multiple Bookings

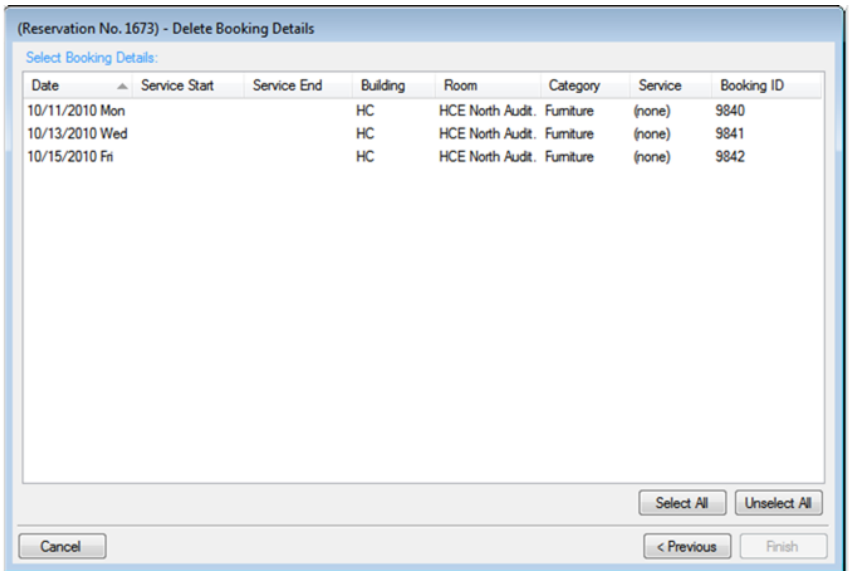
You use the Delete Booking Details Wizard to delete one or more booking details that do not have invoiced items from multiple bookings in a single step. When you delete a booking detail from a booking, any items that have been added for the detail are also deleted.

To delete booking details from multiple bookings, follow these steps:

1. Open the reservation from which you are deleting the booking details in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
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.



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.

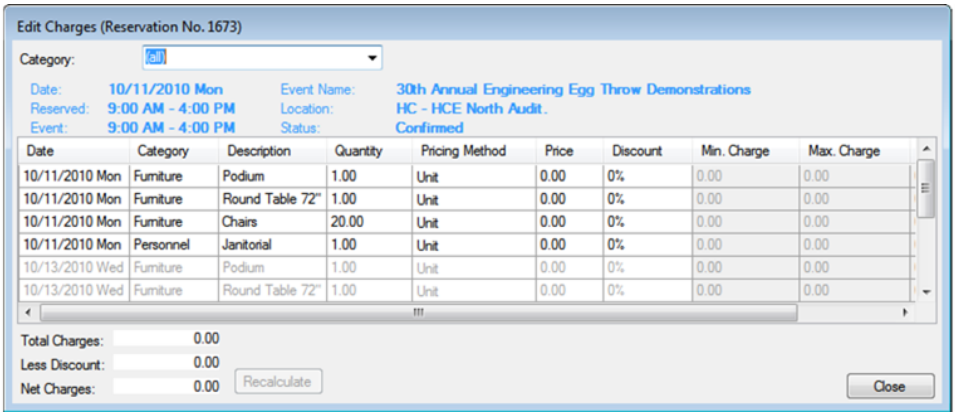


6. Select the booking, or CTRL-click to select the multiple bookings from which you are deleting the categories, or click **Select All** to select all the displayed bookings in a single step, and then click Finish. A message appears indicating that the changes were made successfully.
7. Click **OK** to close the message and return to the Navigator.

CHAPTER 210: Edit Charges for Multiple Billable Items

You can edit resource quantities and billing information (price, pricing method, and so on) for individual items, 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 Also: Void an Invoice and Reprice Service Categories and Room Charges for a Reservation.

1. Open the Navigator and select the reservation you want to work with.
2. In the left pane of the Navigator, you can edit all billable items in all the bookings for a reservation, 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 want to edit).
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.



Note:
You can select a category on the Category drop-down list to narrow the results.

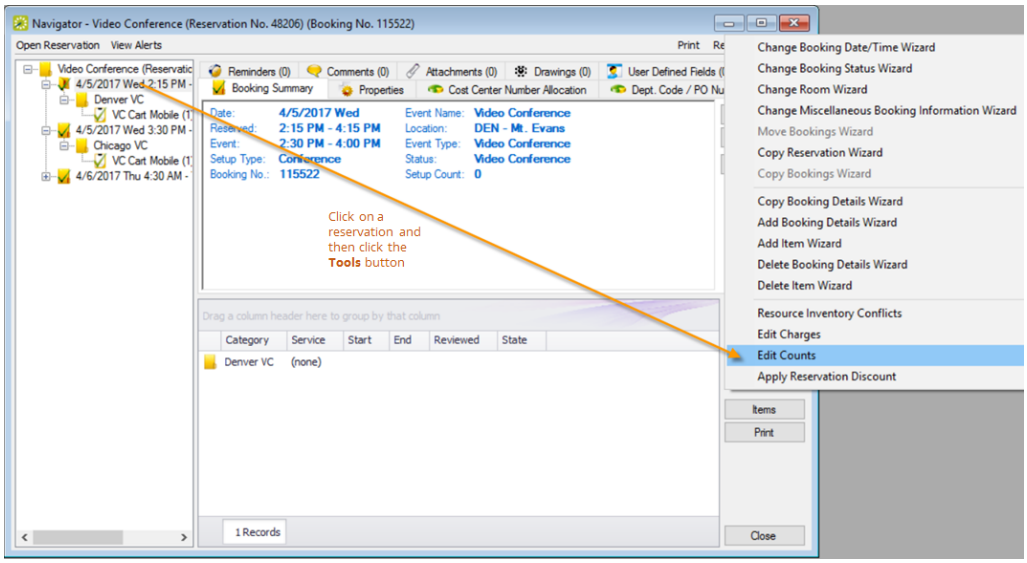
4. To change the quantity, pricing method, price, or discount percentage for an item, click in the field and make your changes.
5. When your changes are complete, click **Close**. Any resulting recalculations automatically execute. The Edit Charges window closes and you return to the Navigator.

CHAPTER 211: Edit Count Information for a Booking

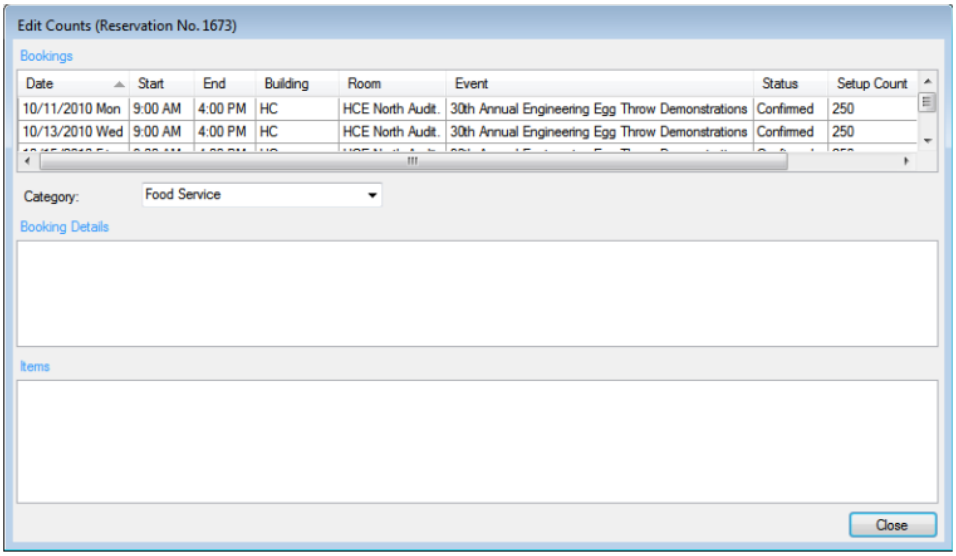
You use this tool to change various "counts" for a booking, such as setup count, attendance count, the estimated count, guaranteed count, and actual count for a booking detail (with a category type of catering), as well as the counts for non-invoiced booking detail items. You can make similar changes in other areas of the application. The Edit Counts simply collates all count information in a single location for editing.

You can edit the counts for all bookings in a reservation or for just a selected booking.

1. Locate and select the parent reservation in the Navigator.
2. Click **Tools**.
3. Click **Edit Counts.**



4. The Edit Counts window shows a list of bookings under the reservation; select the booking for which you want to edit counts.



Note:

You can focus the list of counts on a Category. The 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.

5. In the middle pane, select the booking detail that contains the items for which you want to change the count. The lower pane refreshes with a list of all the non-invoiced items for the selected detail.
6. To edit the count information for any booking detail or detail item, click in the appropriate field and make the necessary edits. Repeat needed for each booking. When finished, click **Close** to return to the Navigator.

CHAPTER 212: Add Booking Details Wizard

Concept: What are Services, Categories, and Resources?

- Booking details are also called categories.
- Booking detail items, also called resources, are the individual items (coffee, sandwich, projector, and so on) that you add to a booking detail.
- A booking detail might include a service order.

If your booking template is designed so you can add details such as catering, audio/video equipment, or housekeeping to a meeting, you will see fields for these options in the details screens for the booking.

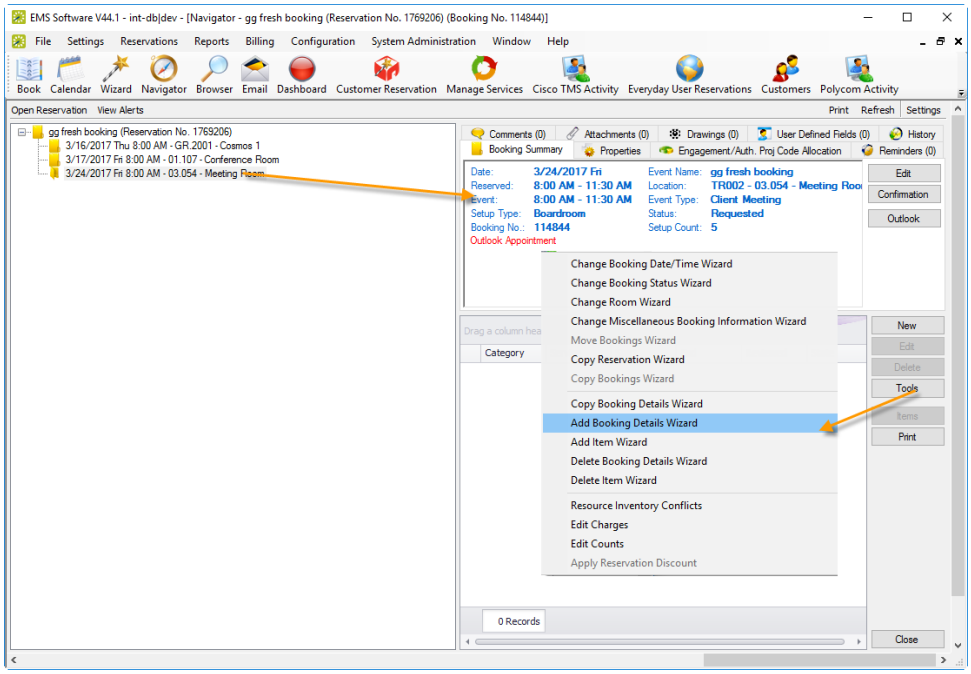
To add services, equipment, and other resources to an existing meeting, you will:

- Navigate to the event.
- Add services and so on to the event.
- Save your changes and send notifications.
- (If the request requires approval) Follow up on your service order request.

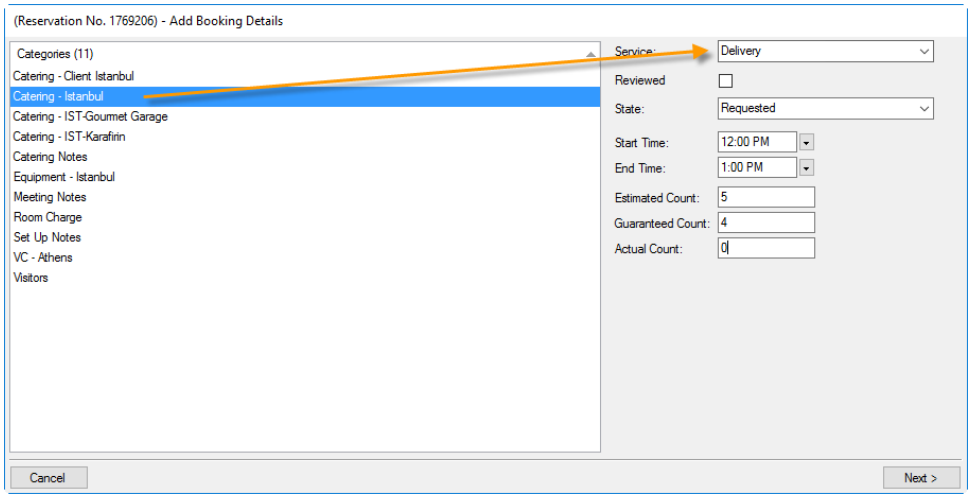
1. Open the reservation.

> **Note:**
> For an in-depth overview of Booking Details you can see for existing events in the Navigator, see Booking Details and Items Overview. This topic simply guides you in adding a service order to a booking.

2. Focus the Navigator on the booking within that reservation for which you want to add services, equipment, etc., and click the Tools button, then select Add Booking Details Wizard (your Administrator might have re-labeled this option; if it does appear, services are not allowed for this type of booking).

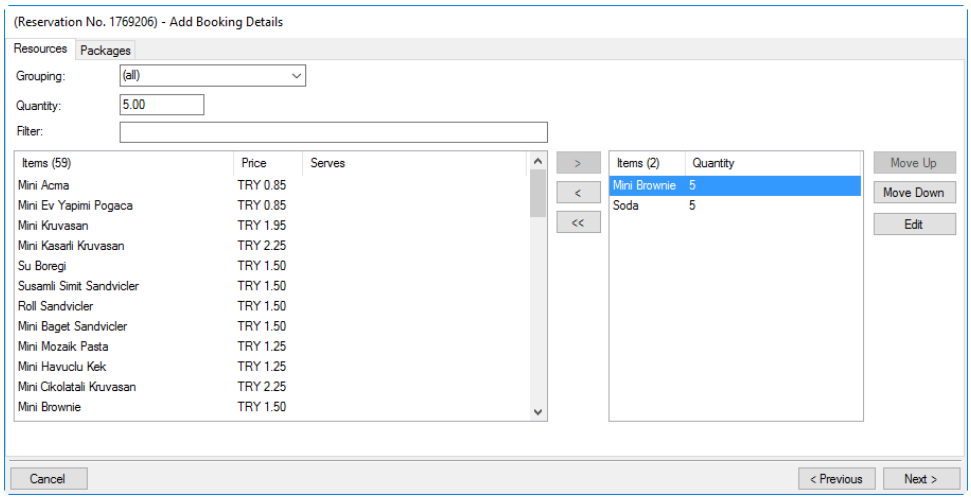


3. Add a Service order: In the Add Booking Details popup window that presents, select a category of service or equipment you want to add. The fields on the right panel change depending on the selection you make.



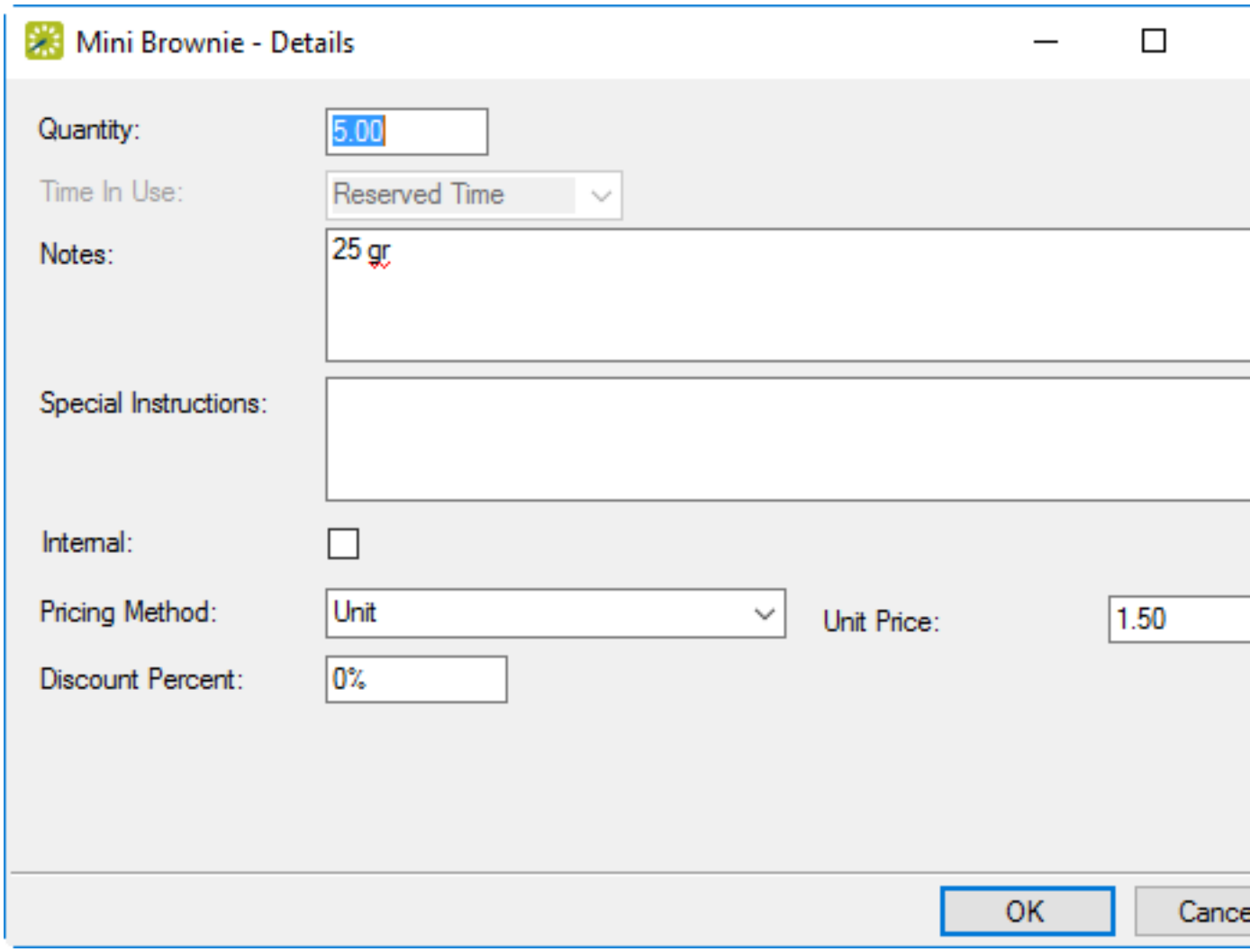
4. When you have completed the fields in the right panel, click the Next button. EMS Desktop Client advances you through the information you must enter to complete the service order. Tabs and fields that display to you vary depending on how the type of service is configured for your organization. The example below shows a catering service order that is defined to allow you to add menu items; two have been added to the right panel which indicates menu items to be included with the order (in

this case, for 5 servings). The same type of window displays for other types of services such as equipment; the only difference is that the items might be human activities such as setup, teardown, opening windows, turning on lights, and so on.



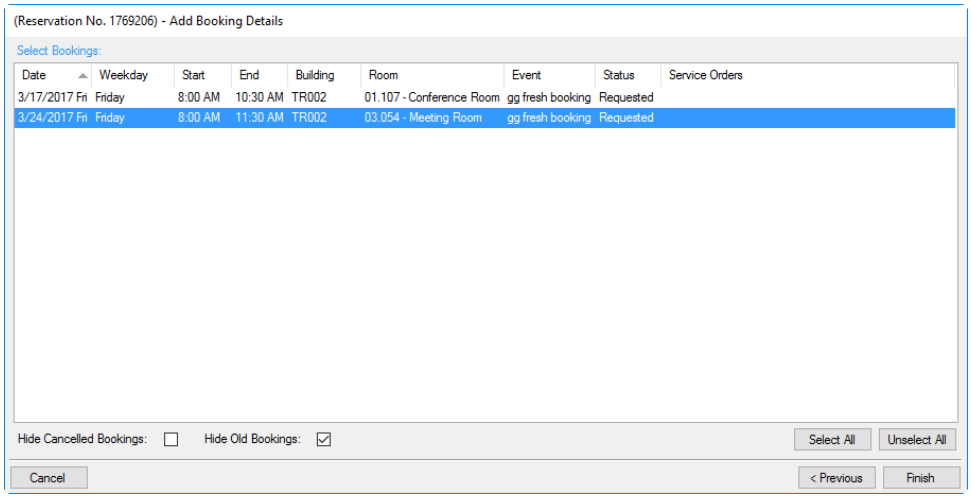
Note:

You can add notes and other details to each menu item by selecting it and clicking the **Edit** button. Click **OK** to save such changes.



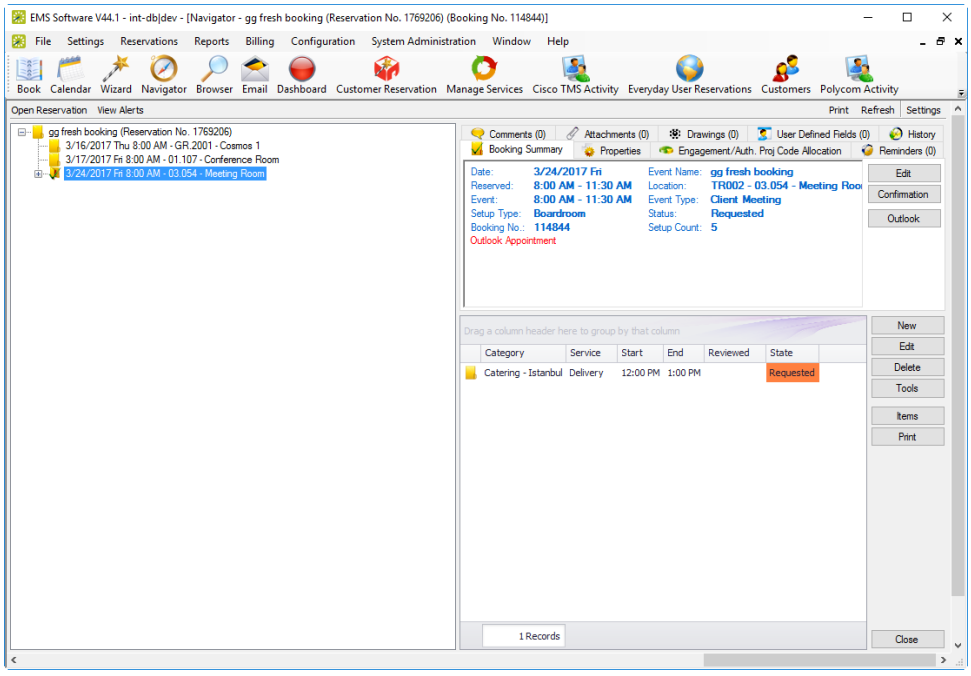
Note:
If a cost is associated with an item, cost related fields will appear similar to those shown above; if you are authorized, you can change them (for example, to apply a discount). See Also: Repricing Categories and Room Charges.

5. Once you have finished selecting items for the service order, click the Next button. A final screen presents where you can select the bookings to which you want to apply the service order.



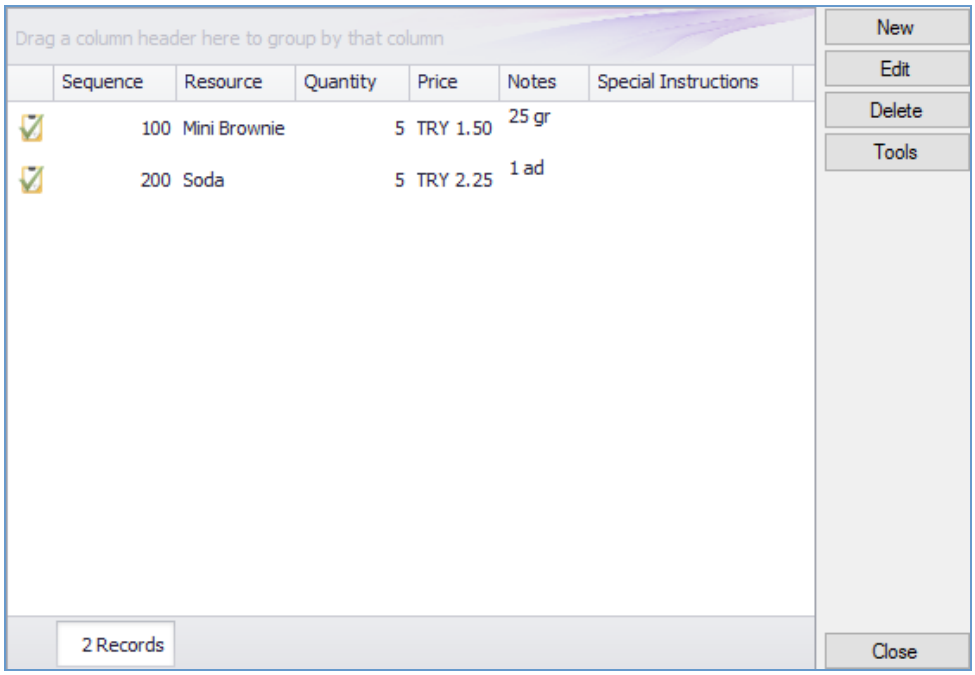
6. Select the booking(s) for which you want to add the service order and then click the Finish button.

7. On the confirmation popup that presents, click Yes to add more service orders, or No to finalize the service order. You return to the Navigator and the new service order appears in the lower right panel. If the service order requires an approval workflow, the state of the request shows in the State column.

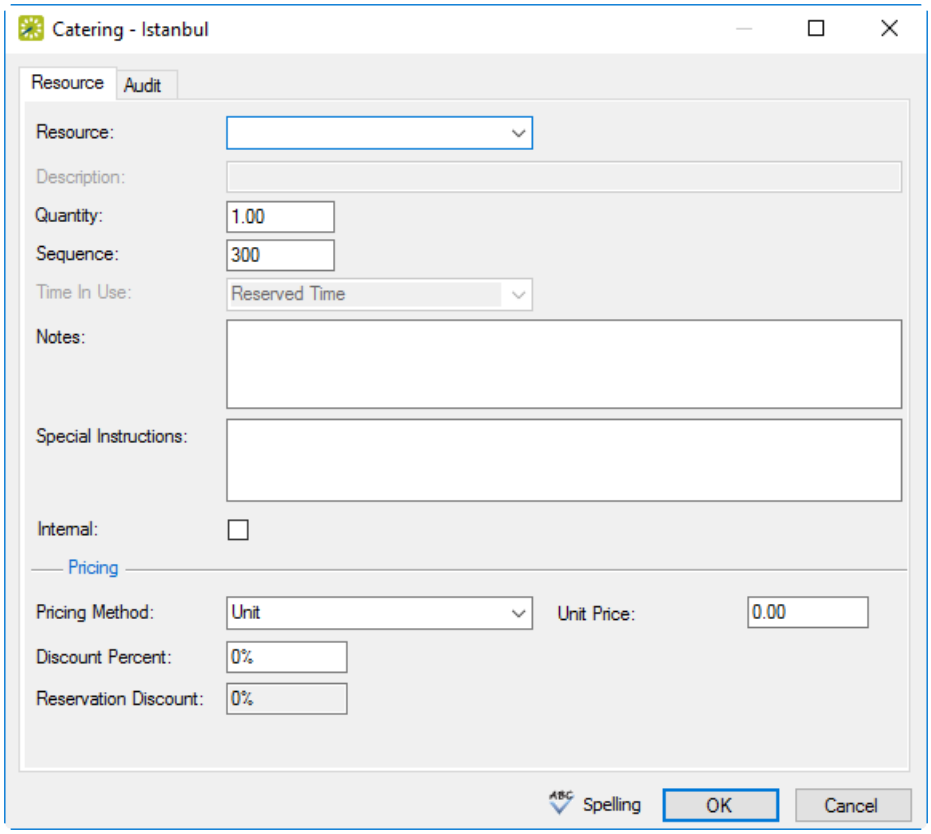


Note:

You can see and work with the items (resources) requested for a service order by selecting it in the lower right panel above and then clicking the Items button.

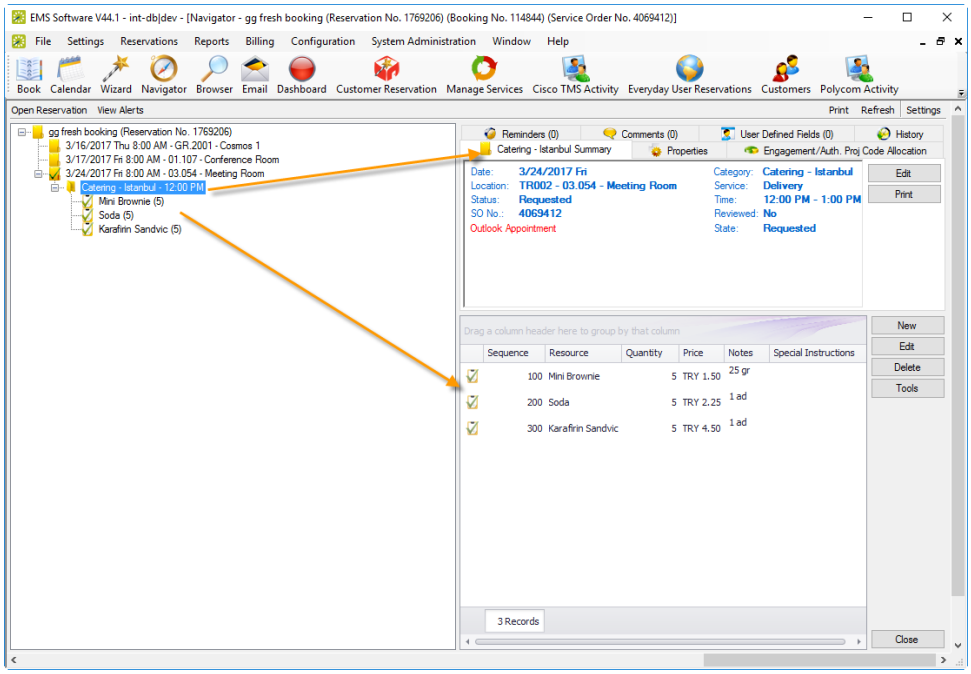


You can click the buttons on the right to add or change items in the list. Clicking New will launch a popup window where you can add more items within this category of service. This example shows catering fields. When you have completed all required information, click OK to finalize the new item.



Once a service order has been added to a booking and you click to expand the order in the left panel, information in both the upper and lower right panel changes to show detail about that specific service order. The following four tabs show in the Navigator in the upper right panel:

- 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.
- Reminders tab—The Reminders tab displays any reminders that were created for the selected booking detail.
- 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.
- 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, service order items for the selected booking detail show in the Items pane in the lower right panel. 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.

If you click on 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.

See Also:

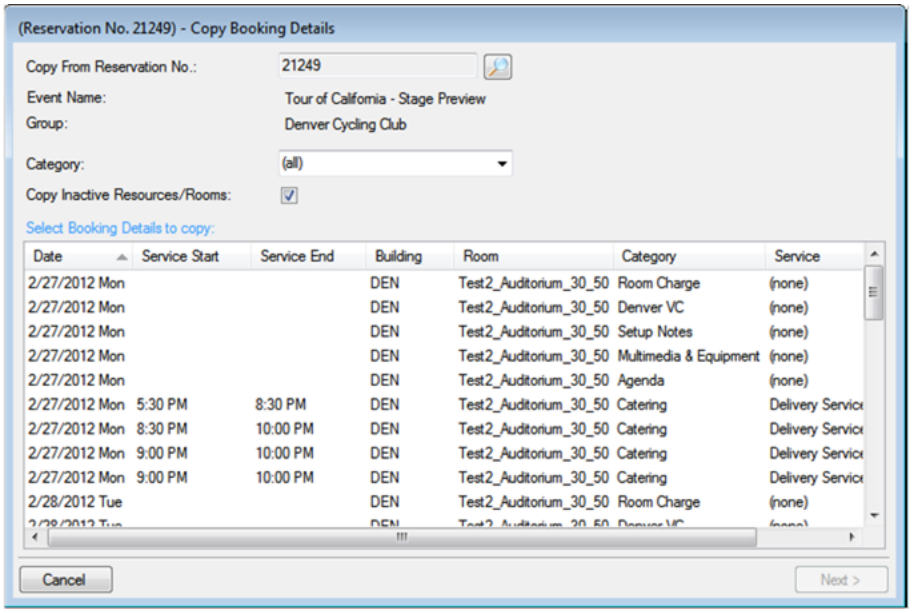
- Adding Booking Details and Items to Multiple Bookings
- Editing Booking Detail Items for Individual Bookings
- Editing Booking Detail Item Charges for Multiple Items

CHAPTER 213: Copy Booking Details Wizard

You use the Copy Booking Details Wizard to copy details from one booking to another booking under the same reservation.

1. Open the parent reservation in the Navigator.
2. In left pane of the Navigator, select the reservation or booking with which you want to work.
3. In the Bookings pane, click **Tools**, and then click **Copy Booking Details Wizard**.

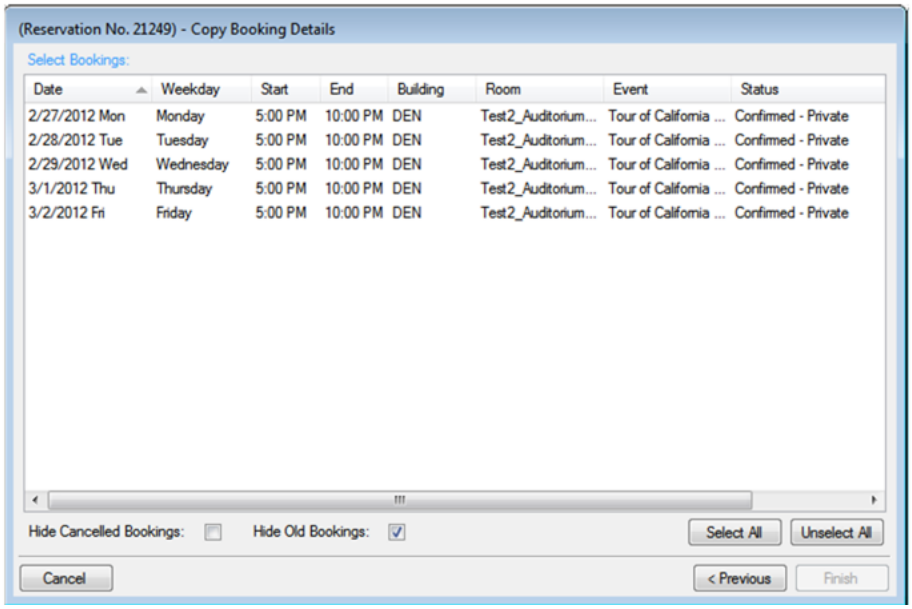
   The Copy Booking Details Wizard appears, listing all the bookings for the selected reservation.



> **Note:**
> You can change the reservation from which to copy details by clicking the Search icon. You can narrow the list by selecting a **Category**. You can deselect the **Copy Inactive Resources/Rooms** if you want to carry over these items.

4. Select the booking(s) for which you want to copy details and click **Next**.

   The next window lists the details you can copy.



Note:

Use the **Hide Canceled Bookings** and **Hide Old Bookings** check boxes to manipulate the list.

5. Select individual or multiple booking details (click **Select All** to select all the displayed bookings in a single step), and then click **Finish**.

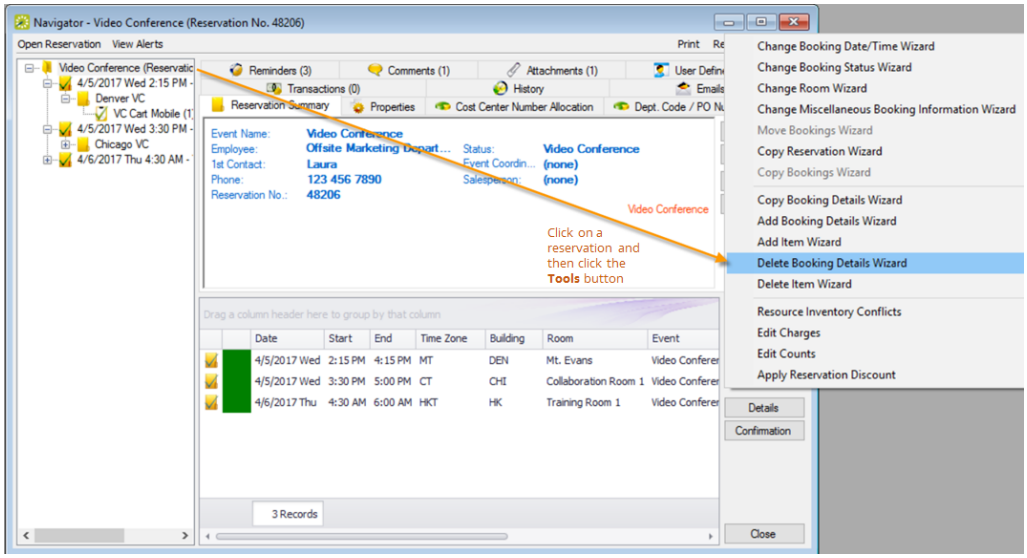
   A message confirms the copy.

6. Click **OK** to close the message and return to the Navigator.

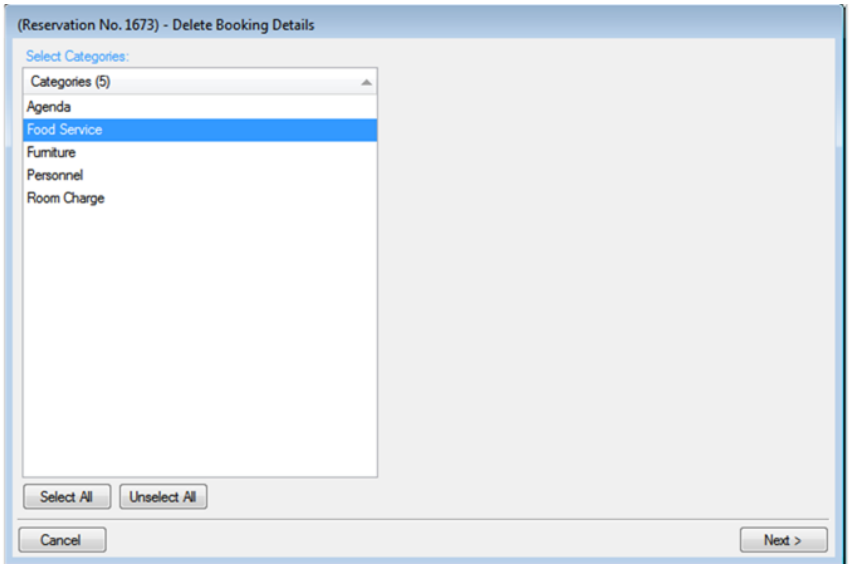
CHAPTER 214: Delete Booking Details Wizard

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.

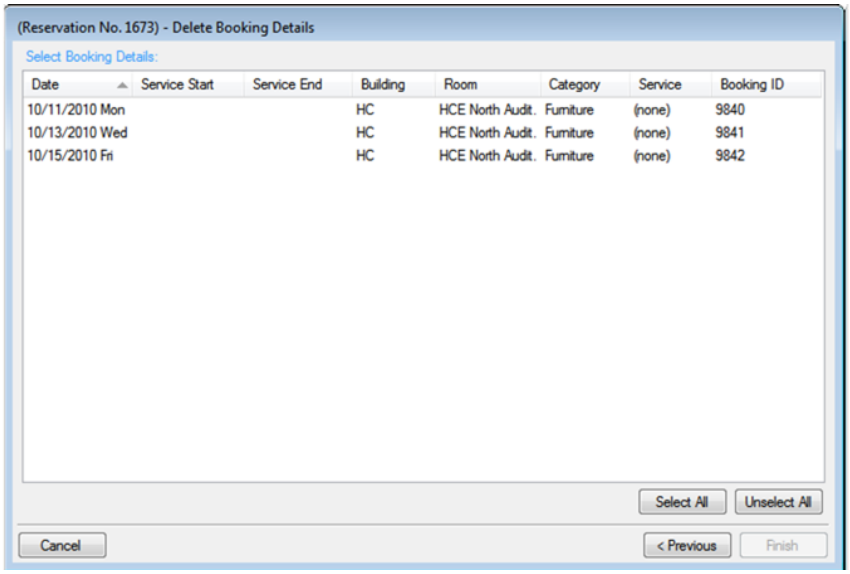
1. Find and select the parent reservation in the Navigator, click **Tools**, and then click **Delete Booking Details Wizard**.



2. The first window of the Delete Booking Details Wizard lists all the categories (booking details) that are already in use for any of the bookings in the selected reservation.



3. Select the category of details you want to delete (or click **Select All** to select all categories in a single step), and click **Next**.
4. The next window lists all the bookings for the selected reservation. Select the booking(s) for which you want to delete details.

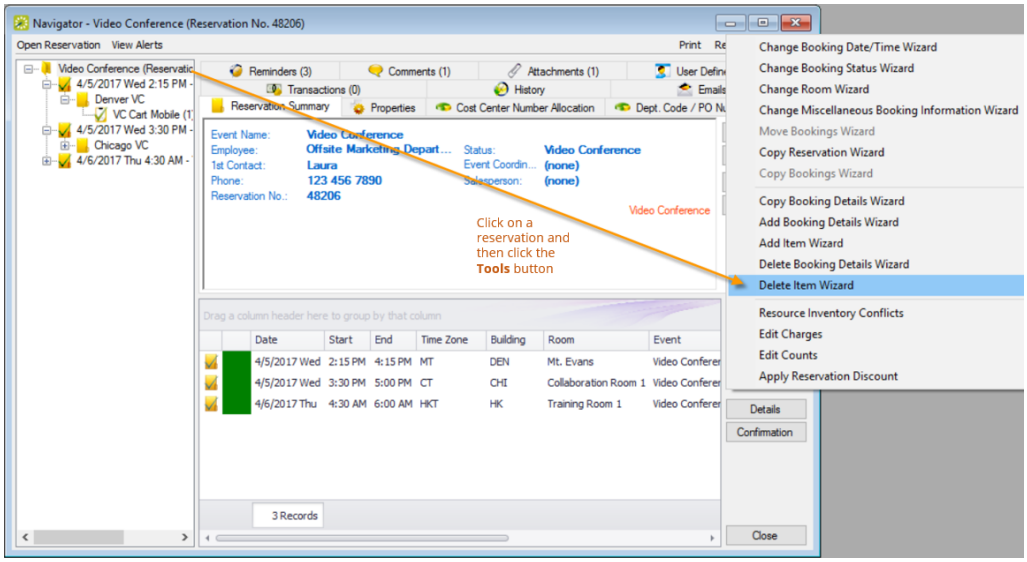


5. Once you have selected the bookings to which you want to apply the deleting, click **Finish**. A message confirms your changes.
6. Click **OK** to close the message and return to the Navigator.

CHAPTER 215: Delete Item Wizard

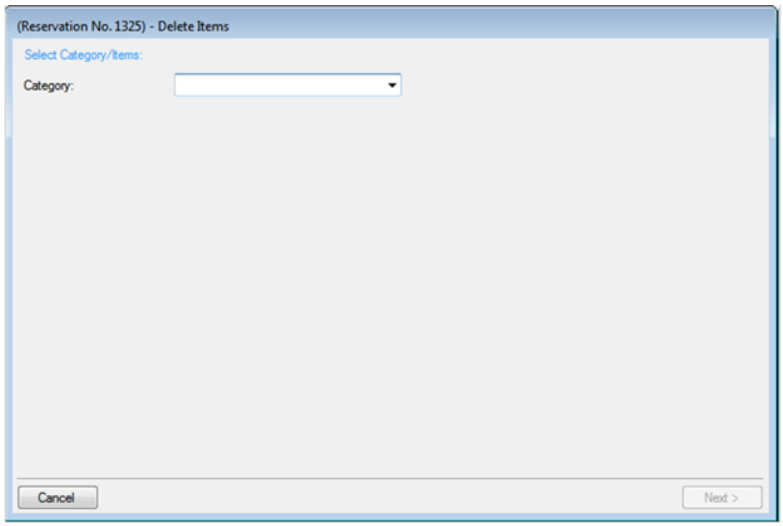
If you want to remove an item from a booking (and it has not already been invoiced), you can use the Delete Item Wizard to delete it. You can delete one item at a time or you can all the items for a booking detail. If you delete an item at the package level, this includes all the items in the package. You can also delete individual items from a package.

1. Open the Navigator.
2. Select the reservation that contains multiple bookings with items you want to delete, then click Tools, and then click Delete Item Wizard.



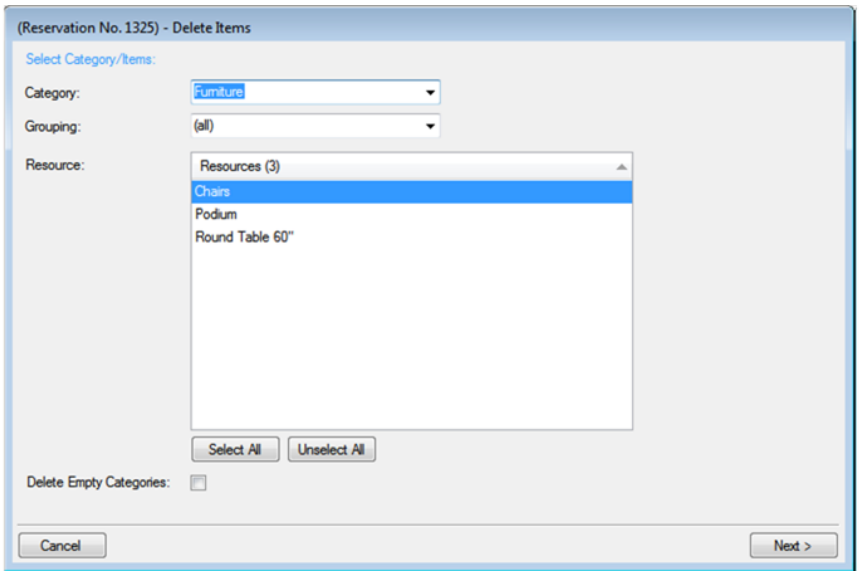
Access the Delete Item Wizard from the Navigator

3. In the first window of the wizard, select the category to which the items you want to delete belong, and then click Next; the drop-down list only shows categories for items that exist within this reservation.



Category Drop-Down List of the Delete Items Wizard

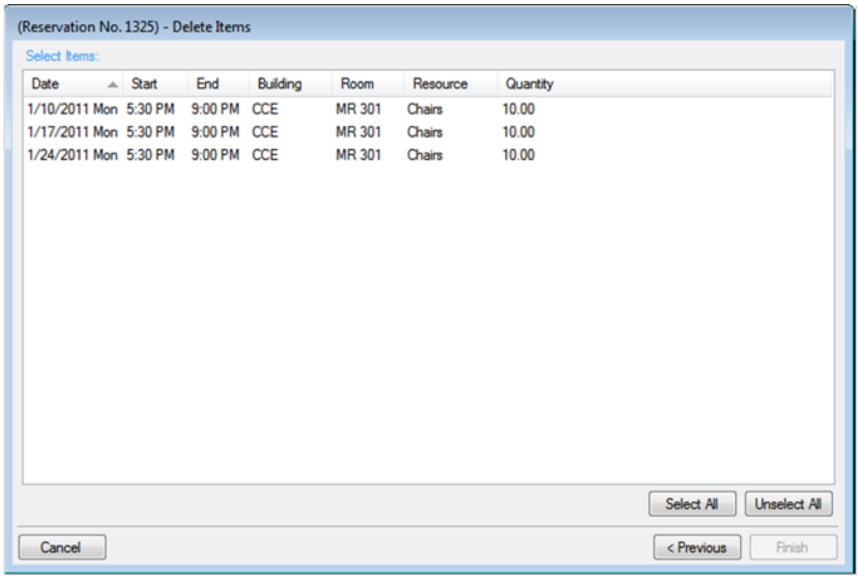
4. The window refreshes to show items within this category that you can delete. The example below shows furniture resources that were added to bookings under the chosen reservation.



Resource Drop-Down List of the Delete Items Wizard

Note:
You can narrow the list using the Grouping field and Delete Empty Categories option.

5. Select items in the list you want to delete, then click Next.
6. The next screen lists all bookings under the reservation to which you can apply the deletion.

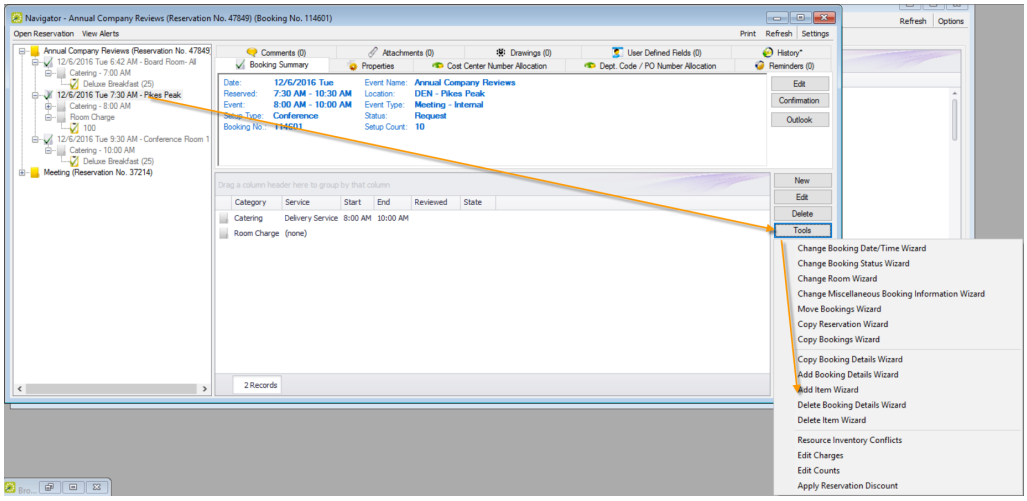


List of Bookings on the Delete Items Wizard

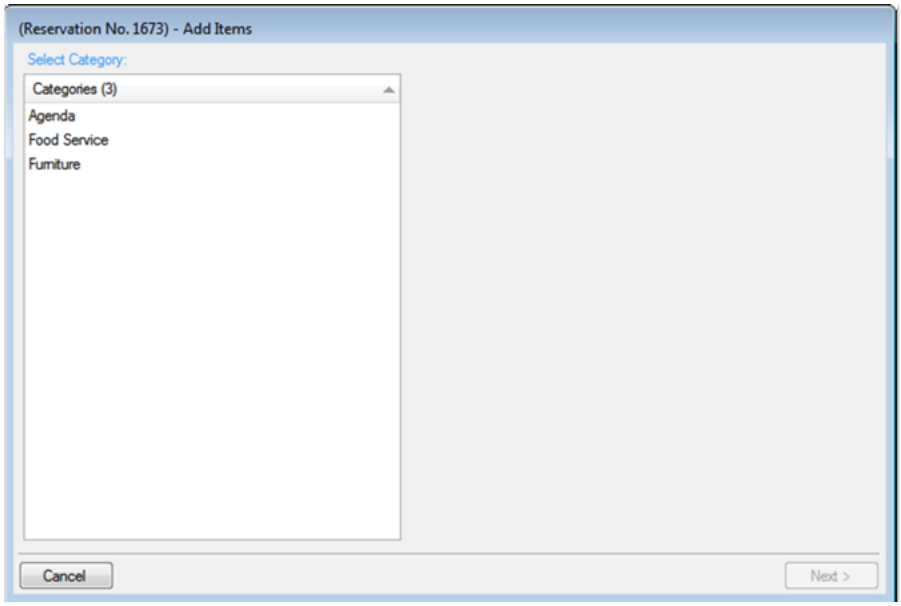
7. Select the booking(s) for which you want to delete the resource items (you can click Select All to select all the displayed bookings in a single step), and then click Finish. A message opens indicating that the changes were made successfully.
8. Click OK to close the message and return to the Navigator.

CHAPTER 216: Add Item Wizard

1. Open the Navigator and select the bookings to which you want to add the same items.
2. In the Bookings pane, click **Tools** and then click **Add Item Wizard**.



3. On the first window of the Add Item Wizard, the Select Category window displays categories that are already in use for any of the bookings in the reservation.



4. Select the category to which you want to add items.
5. Click **Next**.

6. Proceed to one of the following:
    - Adding non-resource category items
    - Adding resource, service order, or catering category items

CHAPTER 217: Comments and Reminders in the Navigator

Concept: Comments Explain Details and Reminders Have Associated Due Dates

- A *comment* is a text entry that explains or clarifies a reservation, a booking, a group, or 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.

In the Navigator, you can add comments/reminders directly to a reservation, booking, or service order, and you can edit or delete them and view their history. When adding a comment or reminder, you can select from a pre-configured list, or you can create your own.

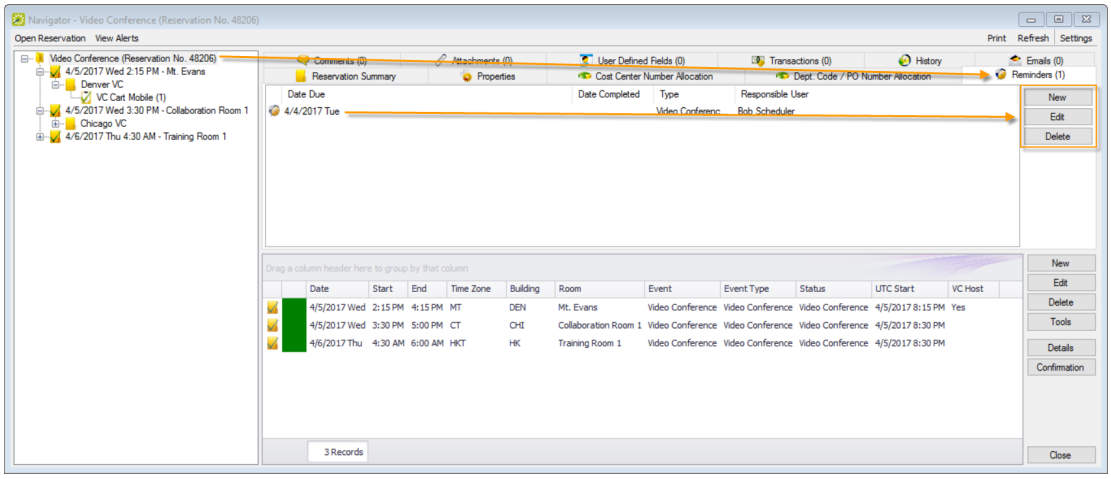
1. Open the parent reservation in the Navigator.
2. In left pane the Navigator, select the reservation or booking with which you want to work.
3. Click the Comments or Reminders tab to work with either.

> **Note:**
> If you prefer to add more than one pre-configured comment or reminder at once to the reservation, right-click on it in the left panel and choose Add Reminders and Comments. A popup window will guide you through adding multiple reminders and comments at once.

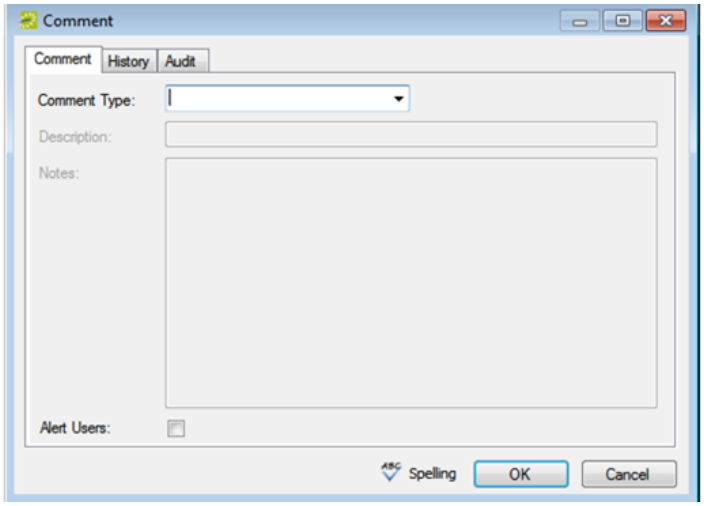
4. To delete or change or view history for an existing one, select it in the list then click **Delete** or **Edit**.

   The Edit popup window provides a **History** tab.

5. To add a new comment or reminder, click the **New** button.



a. If you clicked the New button, a dialog box prompts you to enter details, like the example below.



b. On the Comment Type or Reminder Type drop-down list, select the type of comment or reminder you want to add, or select "(user-specified comment)," and enter a Description.

c. If you are creating a new reminder, set a Due Date and specify the user who should be reminded in the Responsible User field.

d. If you are creating a new comment, you can alert any EMS user when they open this reservation, booking, or service order by selecting the Alert Users option.

e. In the Notes field, enter the comment or reminder.

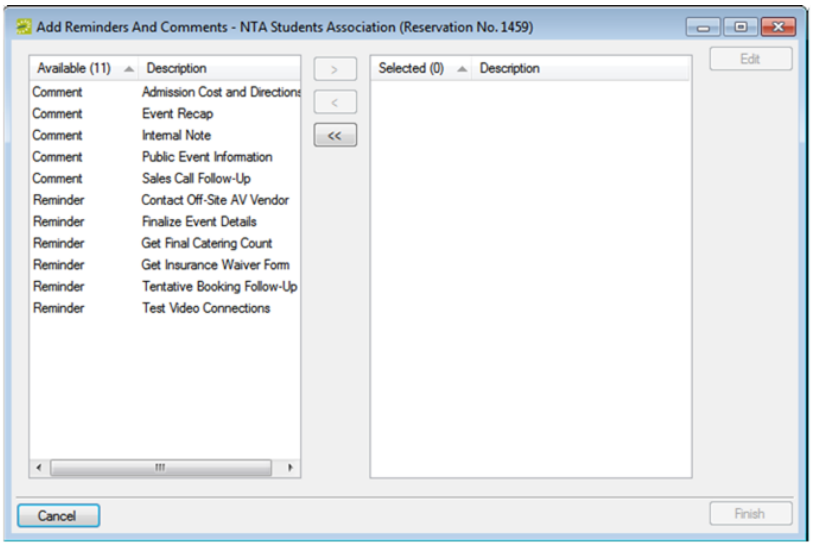
f. Click **OK**. The Comment dialog box closes. The comment is added to the reservation, booking, or service order. The Comments tab remains open.

CHAPTER 218: Add 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.

Note:
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 Also: Comments and Reminders in the Navigator.

1. Open the reservation to which you are adding multiple comments and/or reminders in the Navigator. See Also:
   - Opening a reservation directly in the Navigator
   - Opening a reservation through the Reservation Book
   - Opening a reservation through a group
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.



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 appears indicating that the comment/reminder types were added successfully.

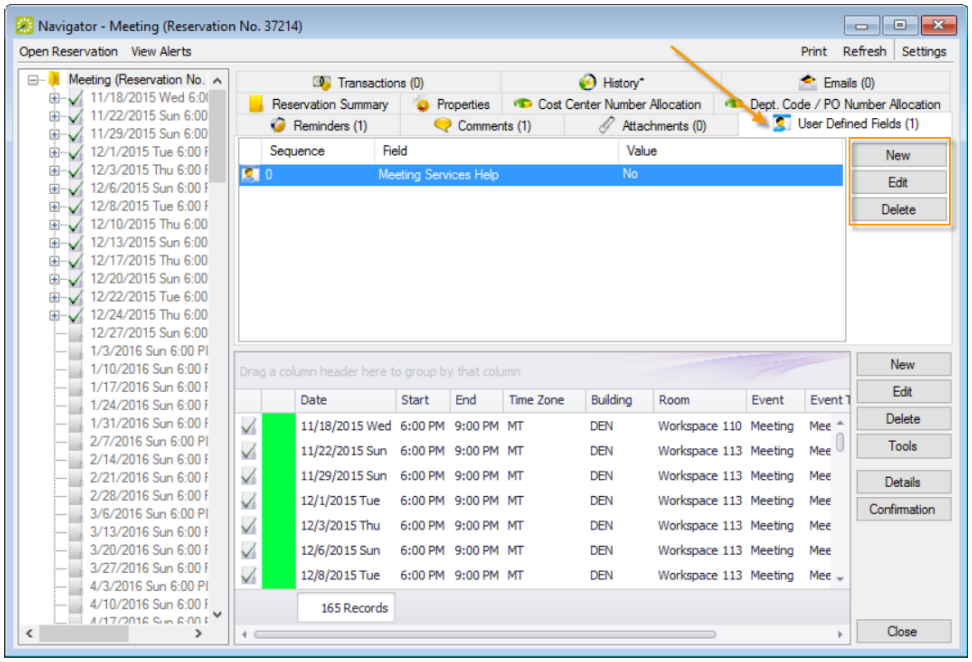
8. Click **OK** to close the message and return to the Navigator.

CHAPTER 219: User Defined Fields in the Navigator

The User Defined Fields tab displays additional fields for custom data for a reservation, booking, or a booking detail that is a service order. Your Administrator configures these fields and their allowed values. If you have permissions, you can add new User Defined Fields to a reservation or booking, edit the value for a User Defined Field, and delete User Defined Fields. You can also view the history for a User Defined Field.

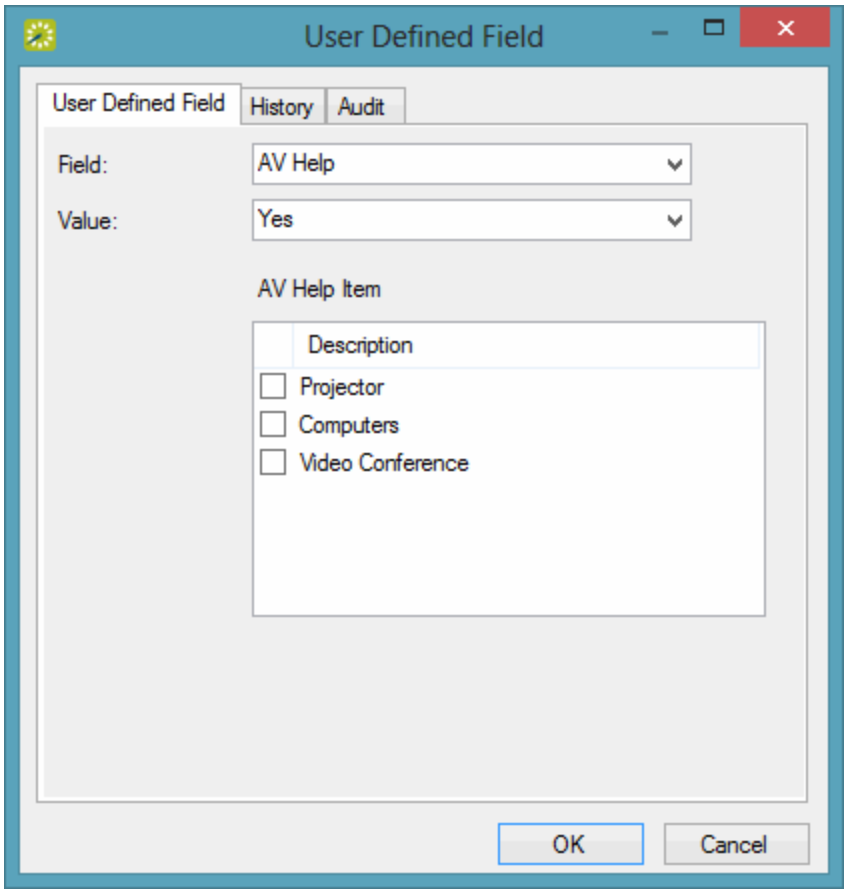
1. Open the parent reservation in the Navigator.

2. In left pane the Navigator, select the reservation or booking detail with which you want to work (remember, the booking detail must be a service order), and then in the top right pane of the Navigator, click the User Defined Fields tab.



3. To change or delete an existing field, click the **Edit** or **Delete** buttons (field History is a tab under the Edit option). Use the New button to add a new one.

a. In the User Defined Field window that appears, define values for the field.



b. Select the type of Field you are adding, an allowed Value for the field (such as a date, number, or text field). If you selected a dependent or multi-select type of field, you might need to select additional information to complete the form:

- **Multi-Select**—You will see a list of values appear below. Pick one or multiple of the choices.
- **Dependency**—You will see another box appear below with another User Defined Field. Pick the answer to that User Defined Field.

4. Click **OK** to save your changes.

CHAPTER 220: Attachments in the Navigator

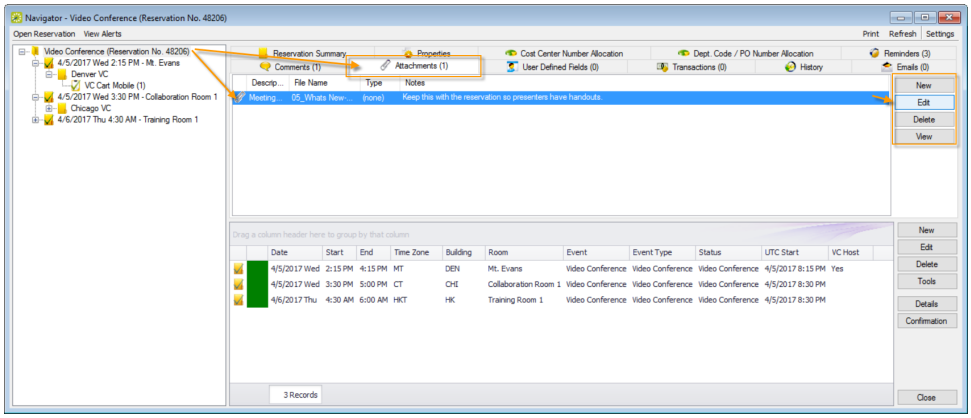
Note:

An attachment is a file that you upload and store with a reservation or booking. A drawing is different in that it is a file referenced from your database.

To add an attachment to a group record, See Also: Configure Additional Information for a Group.

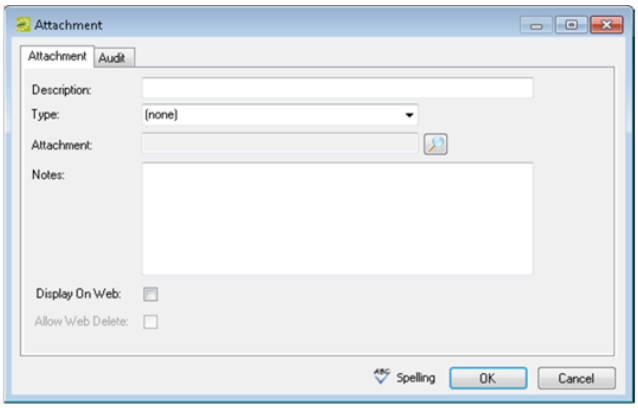
To work with attachments in the Navigator, follow these steps:

1. Open the parent reservation in the Navigator.
2. In left pane the Navigator, select the reservation or booking with which you want to work.
3. In the top right pane of the Navigator, click the Attachments tab.



4. To work with an existing attachment, select it and the use the Edit, Delete, and View buttons. To add a new attachment, click the New button.
   For new attachments, in the Attachment popup window that opens, enter a Description (or leave blank to use the filename), choose a Type (if any), add your own Notes, and if you want for the attachment to show for Everyday Users, click the Display on Web option. Attach a file by clicking the

Search icon. Click OK when finished.



CHAPTER 221: 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 be 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.

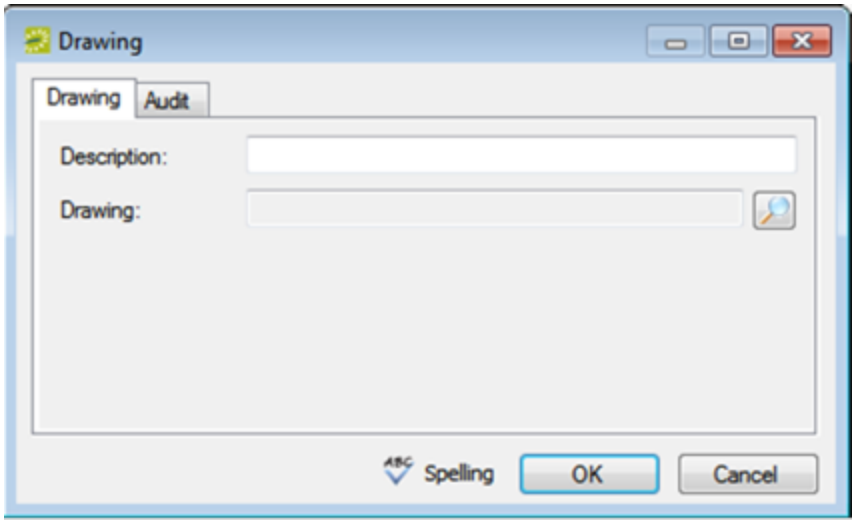
Work with Drawings in the Navigator

To work with drawings in the Navigator, follow these steps:

1. Open the reservation in the Navigator.
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 **Drawing** tab.
4. Continue to one of the following:
   - Attach a stored drawing to a booking
   - Create a drawing "on the fly" and attach it to a booking
   - Detach a drawing from a booking
   - Edit a drawing for a booking
   - View a drawing for a booking

Attach a Stored Drawing to a Booking

1. Click **New** > **Attach**. The Drawing dialog box opens.



2. In the Description field, enter a name or description for the drawing (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 **Drawing** tab remains open.

Create a Drawing "On the Fly" and Attach It to a Booking

1. Click **New** > **Create**. The application you selected as your default drawing application for your EMS client opens, for example, Microsoft Paint.

> **Note:**
> You specify your default drawing application in your user preferences.
> See Also: Set User Preferences and Default Values.

2. Create and save the drawing.

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 appears asking you if it is OK to detach the selected drawings.
3. Click **Yes**. The selected drawings are detached from the booking. The **Drawing** tab remains open.

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 (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.

View a Drawing for a Booking



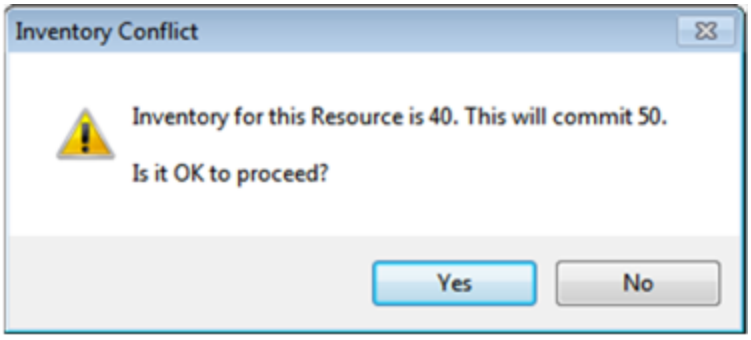
Note:

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 your changes.

CHAPTER 222: Resource Utility Conflicts Tool

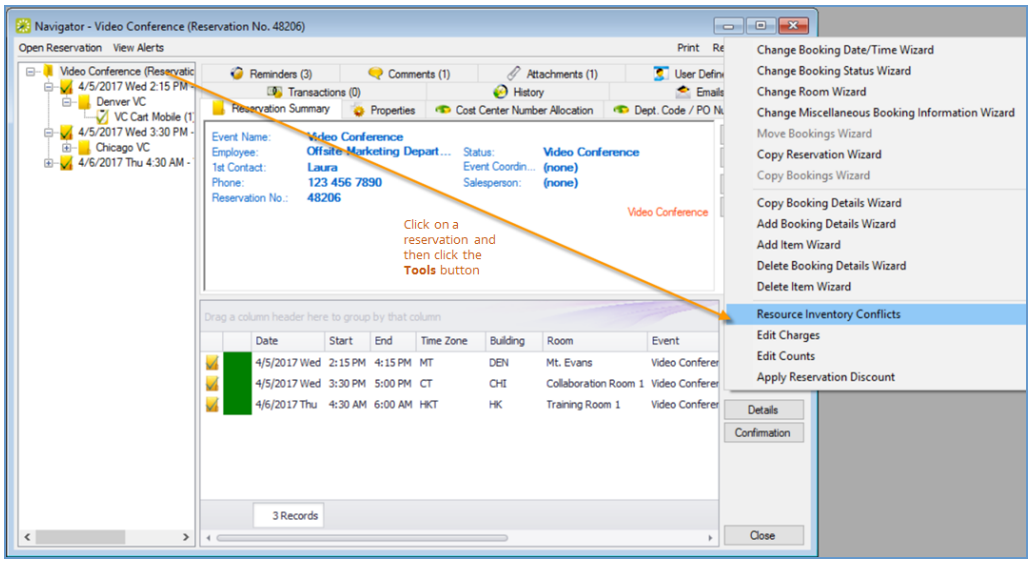
Resource conflicts can occur if bookings for the same date and time require the same resource, and there are insufficient quantities of the resource to accommodate all the bookings. When you reserve any resource for which the inventory is maintained (for example, equipment, personnel, and so on), EMS Desktop Client 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.



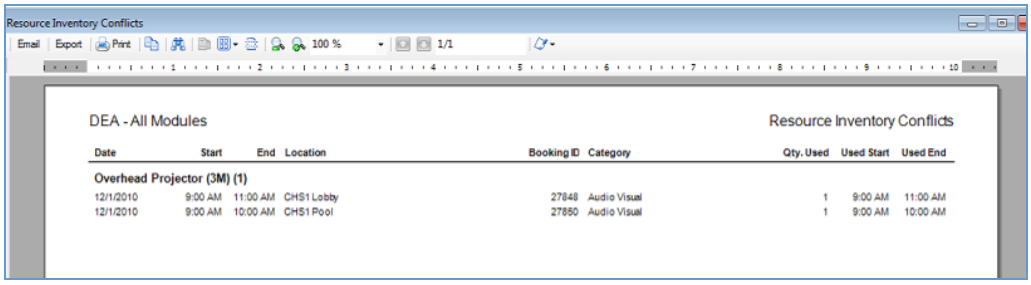
You can dismiss this message and over-commit the resource, however, although you are aware that the resource has been over-committed, other users will not necessarily be aware of this. If you need to confirm that an over-commitment of resources does not exist for a single reservation, then you can manually 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.

Note:
You can check if resources are over-committed across multiple reservation by running usage reports. See Also: Generate Reports and Statistics Reports.

1. Open the Navigator and select the reservation for which you want to run the wizard. Click **Tools** and then click **Resource Inventory Conflicts**.



2. The next window to display shows the Resource Inventory Conflicts report, which lists the resources that are in conflict by booking. The report provides options for printing a hard copy of the report, for emailing the report, and so on.



3. You can use this report to edit the booking details for the involved bookings to resolve the conflict.

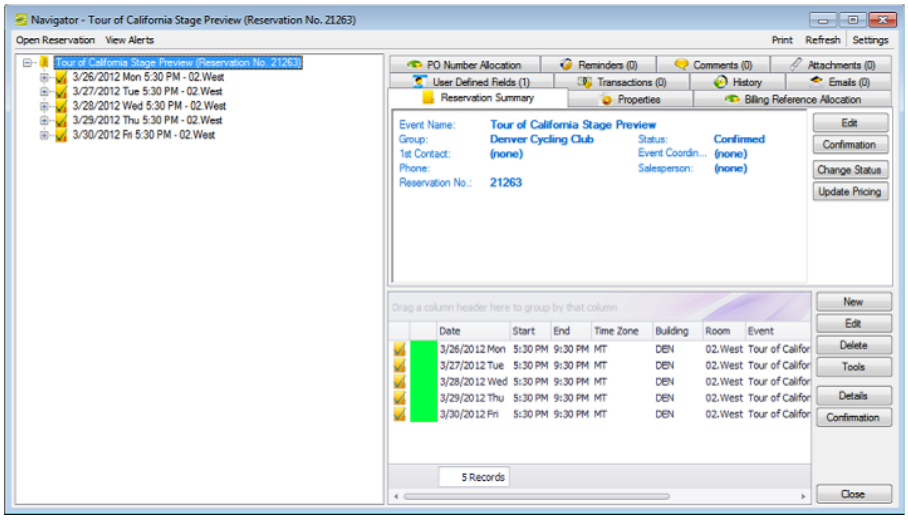
CHAPTER 223: Approve or Deny Reservation Requests

To approve reservations submitted from EMS Web App, you typically use the Change Status option on the Reservation Summary tab in the Navigator. Your EMS administrator must grant you the appropriate security access to change the status of a booking, which includes canceling a booking.

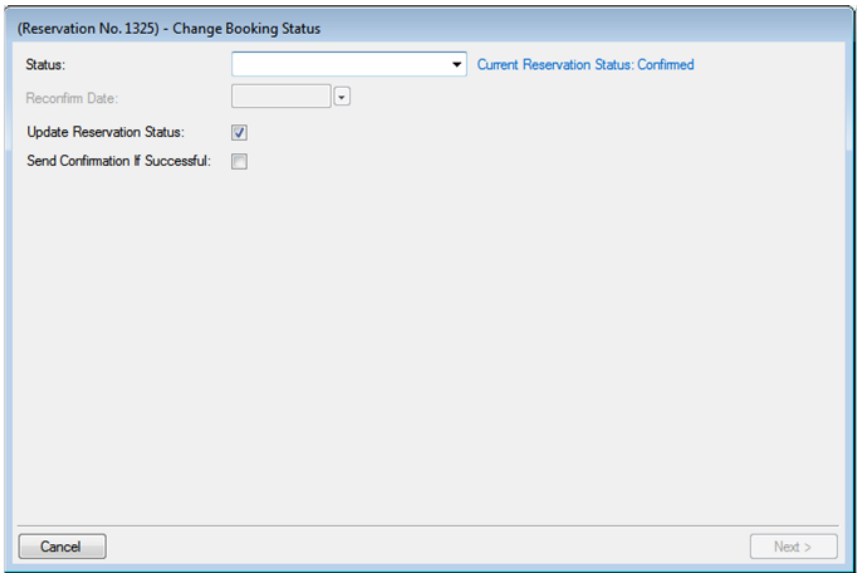
Note:

To approve multiple requests using the Change Booking Status Wizard, see Editing Multiple Bookings in the Navigator.

1. Open the reservation in the Navigator.
2. In left pane in the Navigator, select the request you are approving or denying, and then on the Reservation Summary tab, click Change Status.



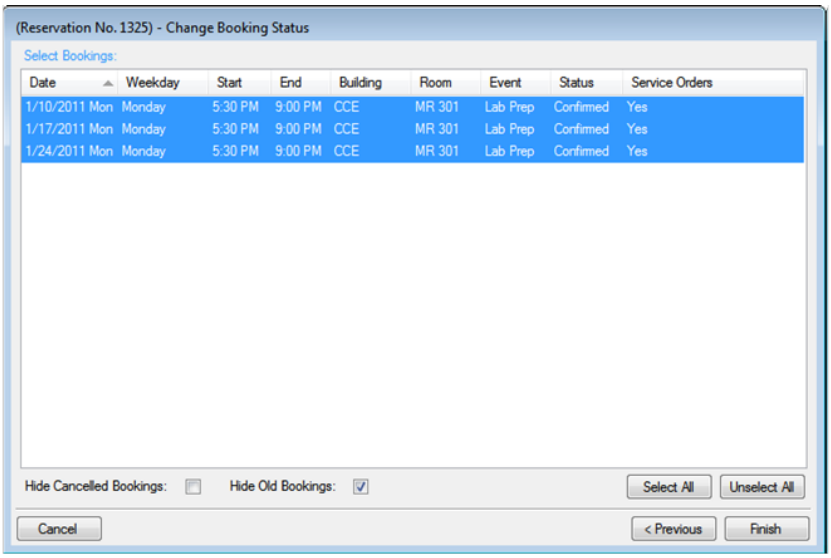
3. The Change Booking Status or Change Reservation Status window opens. Select the new Status for the request.



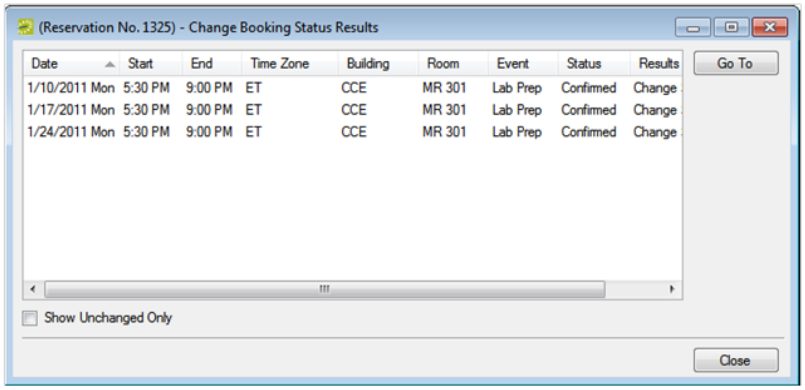
Note:

If you select any type of Canceled status, three additional required fields display: Reason, Who Canceled and Notes. For status changes to bookings, you can leave Update Reservation Status selected to change the parent reservation status to match. You can select Send Confirmation If Successful to trigger an email to the group or individual for whom the reservation was made (depending on your Confirmation Settings).

4. Enter a Reconfirm Date (if required) for the new status you selected.
5. Click Next. The Select Bookings window opens, listing all the current and upcoming bookings for the reservation that do not have invoiced items. All the bookings are automatically pre-selected. You can use the Hide Canceled Bookings and Hide Old Bookings options to manipulate the list.



6. Select the booking(s) for which you want to change changing the status, and then click Finish. The Change Booking Status Results window displays to show booking status changes for this reservation.



Note:

To see only bookings that were not changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

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 when you Close this window. You can manually run a Resource Inventory Conflict report: in the Bookings folder of the Navigator, select Tools > Resource Inventory Conflict.

7. Click **Close** to close the Change Status Results window and return to the Navigator.

CHAPTER 224: The Calendar

You can use the calendar window to search for reservations, bookings, and service orders in your EMS database. The results are listed in a calendar view.

The following topics provide more information about the calendar:

- Search with the Calendar
- Search with the Resource Calendar

CHAPTER 225: Search with the Calendar

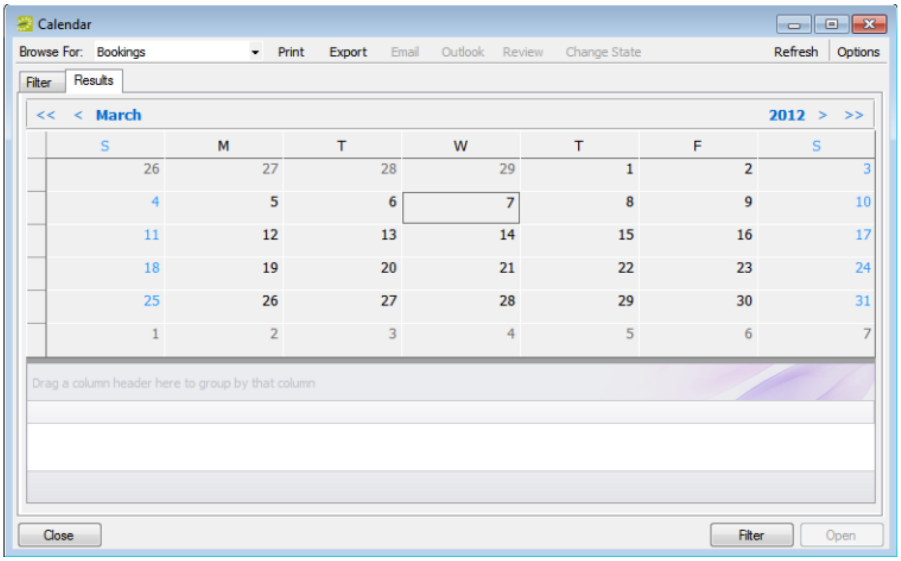
You use this window to search for reservations, bookings, and service orders in your EMS database. The results are listed in a calendar view. You can perform a basic search or an advanced search:

- In a basic search, you specify basic information 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.

Search in the Calendar

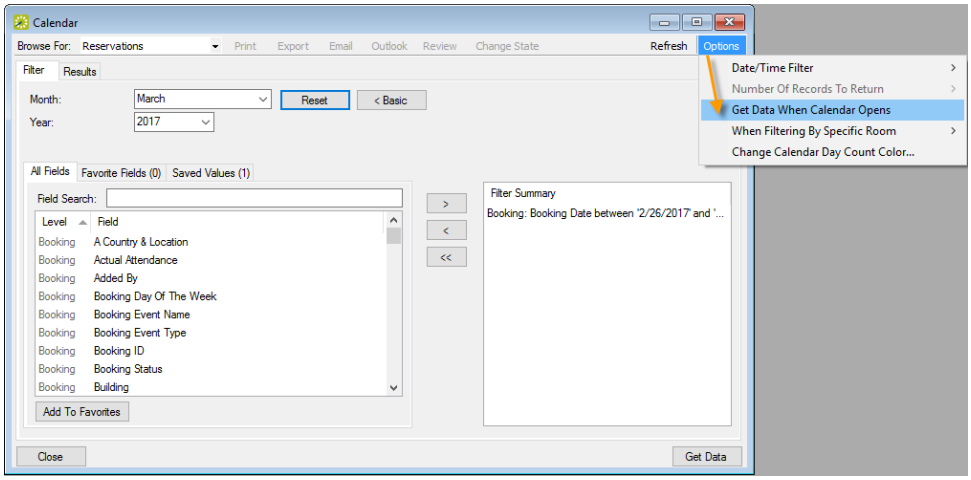
To perform a search in the Calendar window, follow these steps:

1. On the EMS toolbar, click the Calendar icon. The Calendar window opens. When the Calendar window first opens, it defaults to the **Results** tab, set to the current month and year.

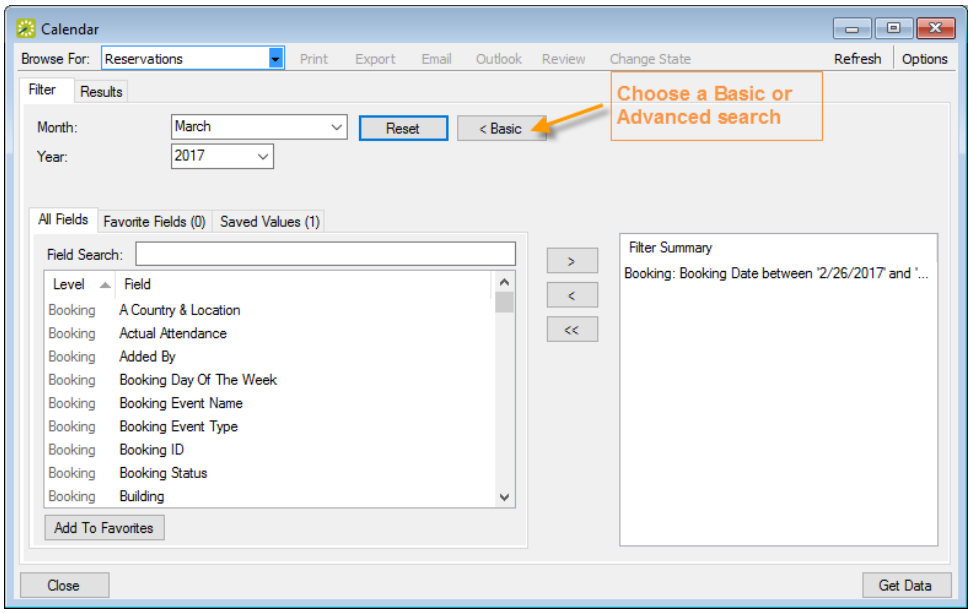


Note:

The Options menu lets you set the Calendar to always display results when it first opens. Click the **Get Data When Calendar Opens** option.



2. Click the **Filter** tab (if needed) to begin setting criteria for your search. You can toggle between a Basic or Advanced search using a toggle button.



Basic Search

To perform a basic search, follow these steps:

1. On the Browse For field, set the search to focus on Reservations, Bookings, or Service Orders.

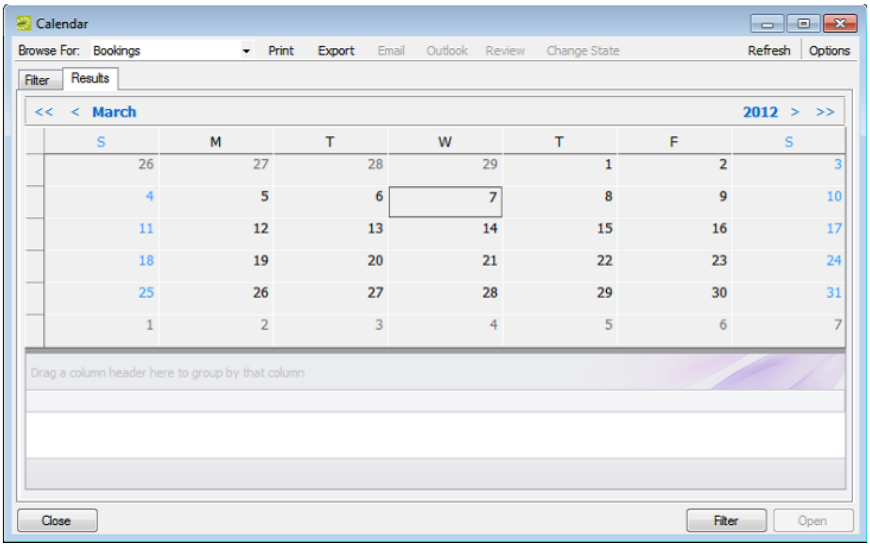
2. Enter search criteria using the fields as defined below.

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 Canceled	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 window and search for a specific group. See .
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, Edward, Eddie, 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. You can click **Options** and set 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**.

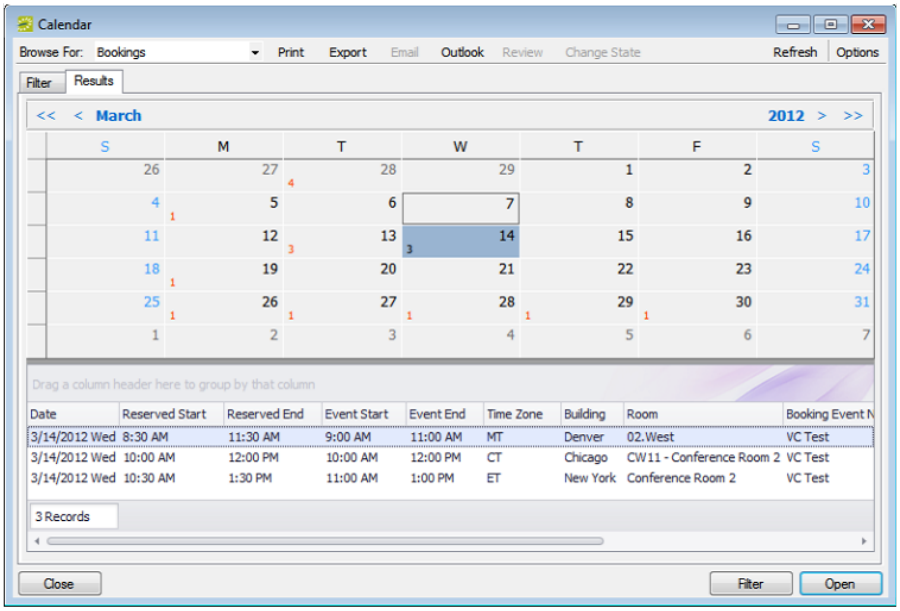
4. Click **Get Data** or **Refresh**. The search results are listed on the **Results** tab in a calendar view. The

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 events 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.



Calendar Window, Results Tab

5. Change the **Browse For** field at the top to see Reservations, Bookings, or Service Orders. Click on a date in the upper pane to see items for the date in the lower pane of the tab.



You can do the following from this page:

- Open a reservation. booking, or service order: double-click on the item in the lower pane to open it in the Navigator.
- Click **Print** to print the search results.
- Email attendees: select an event and either click **Email** (if enabled) to start a pre-addressed SMTP email to the group for that event (see Send Email from EMS), or click **Outlook** > **Send Invitation** (if enabled) to message attendees via Outlook. Your Administrator must set a system parameter to enable these functions.
- Click **Export** to export the search results to a Microsoft Excel spreadsheet.
- Work with Service orders: To mark Service Orders as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click **Review** > **Mark as Reviewed**. To change the state of Service Orders, click **Change State**. For detailed instructions in using the page that appears next, see Search for Service Orders.
- Click **Filter** to return to the **Filter** tab, make any necessary changes to the search criteria, and then repeat the search.
- Click **Refresh** to re-query the database based on the current search criteria.

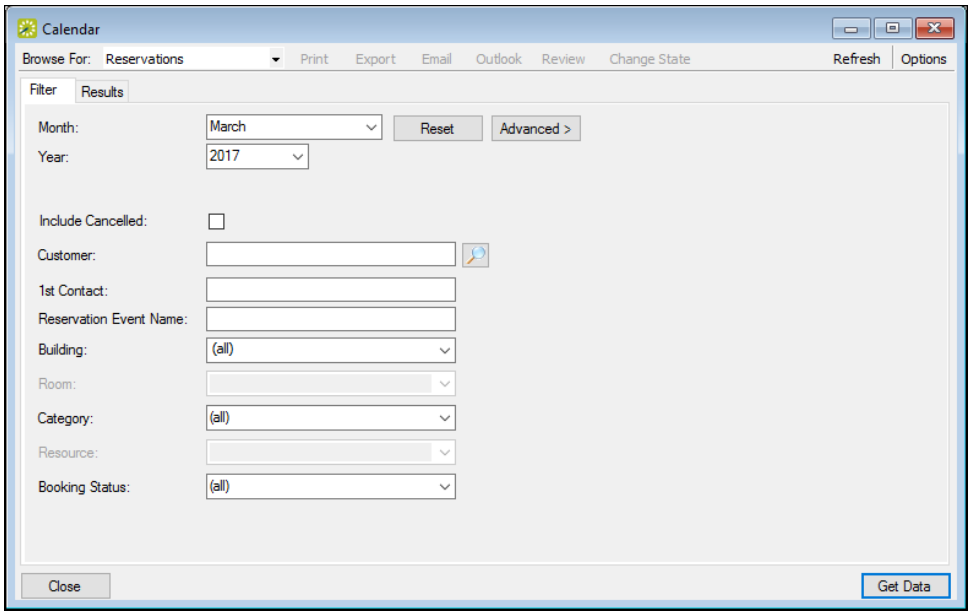
6. Click **Close** to save your changes and settings.

> **Note:**
> To reset the columns to their default values, click the **Reset** button.

Advanced Search

To perform an advanced search, follow these steps:

1. Toggle to the **Advance** search using the button.



2. Month and Year default to the current month and year. You can enter different values as needed.

3. Click **Options** if you want to add the 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. Set search criteria in the remaining fields as needed.

5. Click **Get Data** or **Refresh**. Search results are listed on the **Results** tab just like they were for your **Basic Search**, with the same options for working with the results.

6. Click **Close** to save your changes and settings.

CHAPTER 226: Search with the Resource Calendar

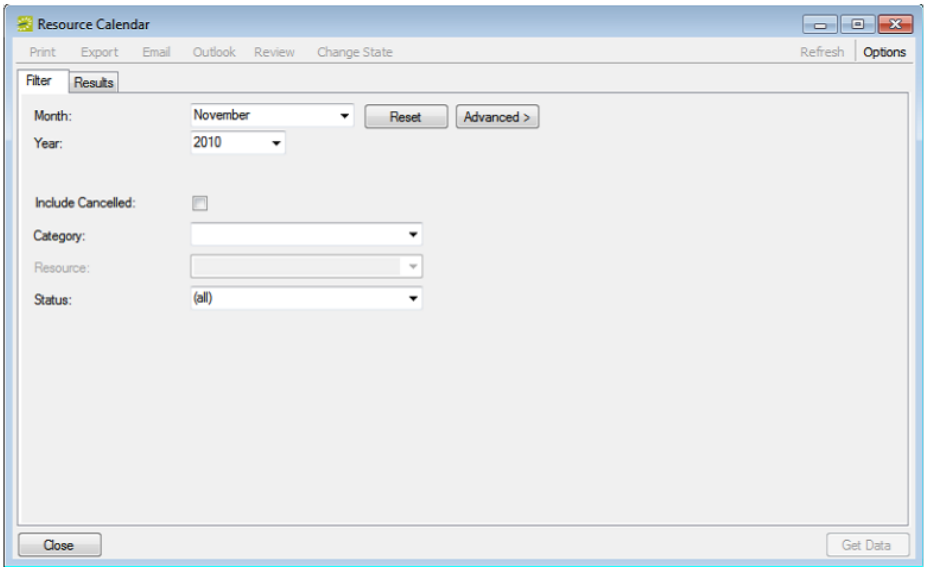
You use the Resource Calendar to search for a particular resource and determine how much of the resource (that is, how many individual items) is needed for a specific day or month in a specific year. For example, how many slices of key lime pie were needed in March of 2018? You can use the results of 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.

Search in the Resource Calendar

To search in the Resource Calendar, follow these steps:

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.



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:

- Basic search in the Resource Calendar
- Advanced search in the Resource Calendar

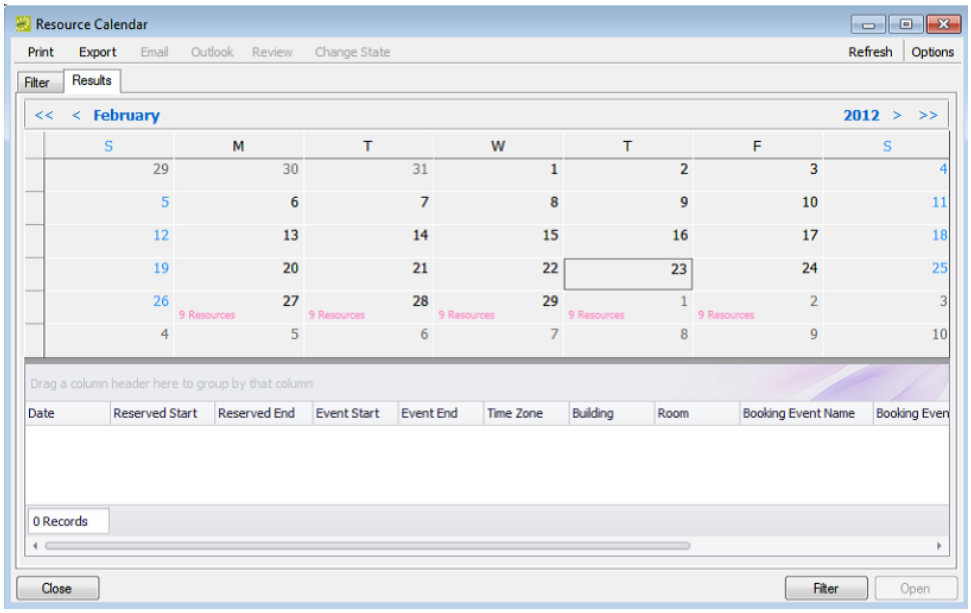
Basic Search in the Resource Calendar

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 Canceled	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.

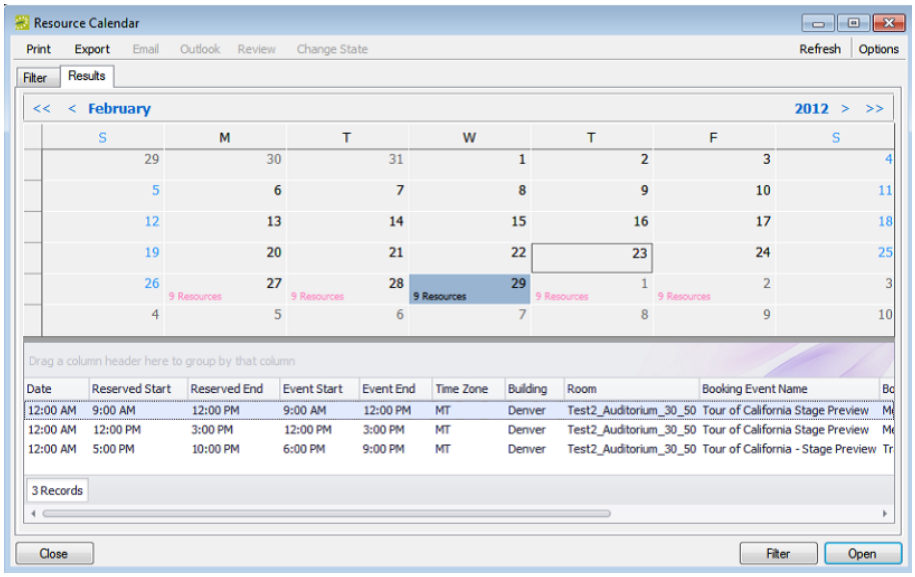
3. Optionally, click Options and edit the default values for one or more additional search options—Date/Time Filter, Number of Records to Return, Specific Room Filters, and Change Calendar Day Count Color.
4. Click Get Data or Refresh. The search results are displayed on the Results tab in a calendar 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.

> **Note:**
> 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.



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.



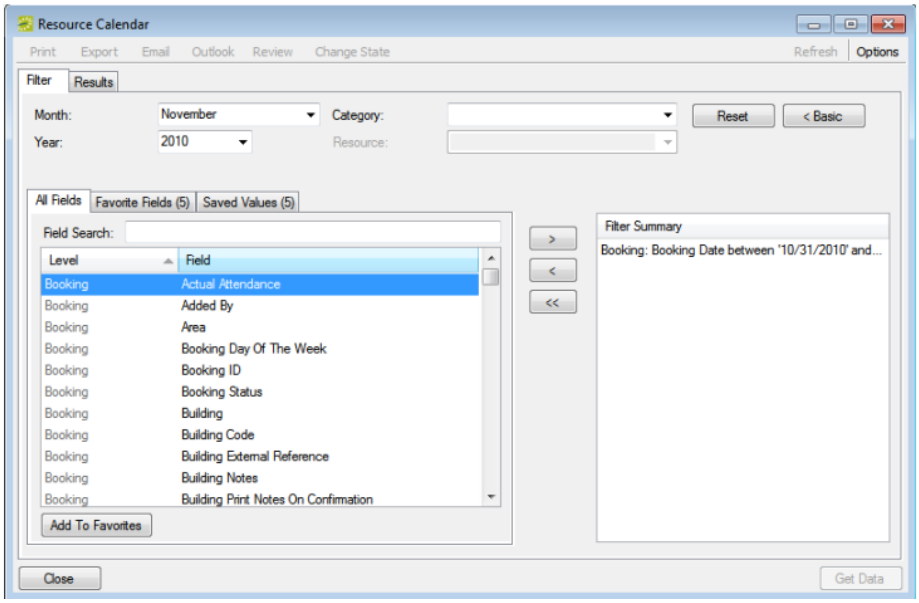
   - The lower pane on the Results tab is an EMS Browser window. See An EMS Browser Window for all the features that are available for this pane.

   - 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.

Advanced Search in the Resource Calendar



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 (>).

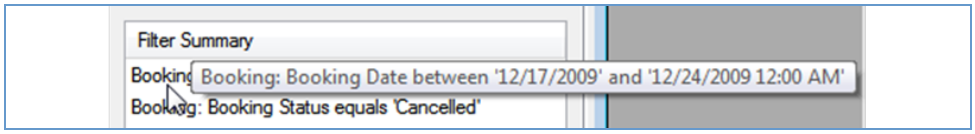
> **Note:**
> To filter the list of available fields, in the Field Search field, enter a search string. Your search is limited to the exact order of the characters in the string, but the search string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of add returns Added by, Date Added, and Group Address 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.

> **Note:**
> 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.

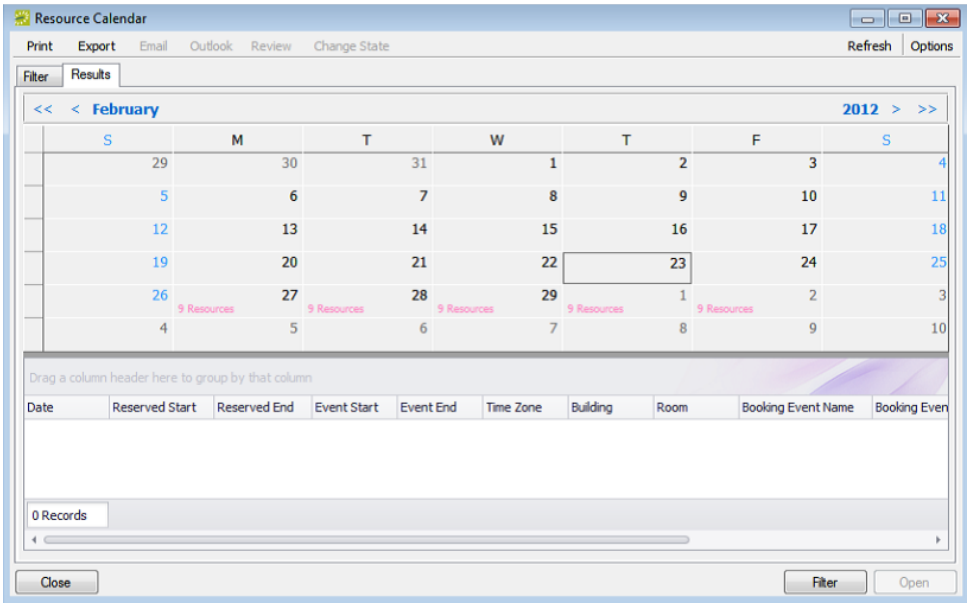
> **Note:**
> To view a selected field option in its entirety in the Filter Summary list, rest the mouse pointer on the entry. A tooltip showing the complete field option information opens.



Viewing a selected field option in the Filter Summary list

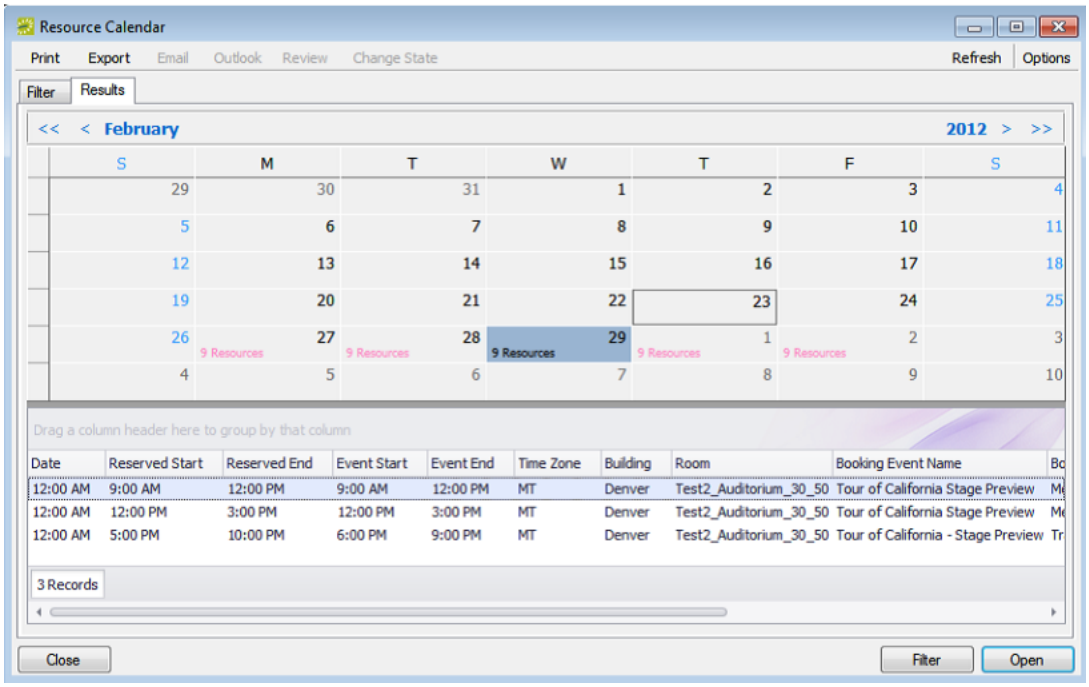
3. Click **Get Data** or **Refresh**. The search results are displayed on the Results tab in a calendar view. The total number of resources in all bookings that meet the search criteria is indicated on the dates on which the events occur. The current day's date is outlined in black.

> **Note:**
> By default, the number of resources is indicated in red unless you selected a different color for the Change Calendar Day Count Color.



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.



   - The lower pane on the Results tab is an EMS Browser window. See An EMS Browser Window 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.

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.

CHAPTER 227: The Reservation Wizard

You can use the Reservation Wizard to check for available space for an event and to make a reservation for the event. The Reservation Wizard helps you 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.

The following topics provide more information about the Reservation Wizard:

- Reservation Wizard Fields
- The Everyday User Reservation Browser
  - Search with the Everyday User Reservations Browser
- Create a Reservation in the Reservation Wizard
- Book a Video Conference

CHAPTER 228: Reservation Wizard Fields

This section explains the fields on the reservation wizard.

Event Section

Field	Description
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 Section

Field	Description
Group	Drop-down 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 Also: Search for a group and/or contact. 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. **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.
1st	When you select a group, if a default contact has been defined for the group, then this field

Field	Description
Contact Temp Contact	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 Configure Contacts. • 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 drop-down 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
	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

Field	Description
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.

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.

Field	Description
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

Field	Description
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	Drop-down list of all the available formats for printing this event on the Event Calendar and Event Schedule reports.
URL	The event URL.

Virtual Tab

Field	Description
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.

Field	Description
	Note: An Everyday User might be assigned to more than one process template, so make sure to select the template that is applicable for this reservation.

User Defined Fields Tab

Field	Description
	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 Also: User Defined Fields in the Navigator.

Video Conference Tab

Field	Description
	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.

CHAPTER 229: The Everyday User Reservation Browser

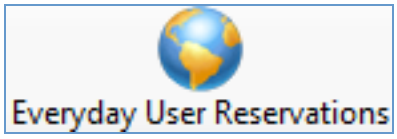
You can use the Everyday User Reservations Browser to search at a very detailed level for reservations, bookings, service orders, resources, everyday user reservations, and pre-defined queries. The results are listed in a calendar view. You can perform a basic search or an advanced search:

- In a basic search, you specify basic information 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 search using the Everyday User Reservation Browser, see Search with the Everyday User Reservations Browser.

Concept: An everyday user reservation is any reservation that a user has submitted through EMS Web App.

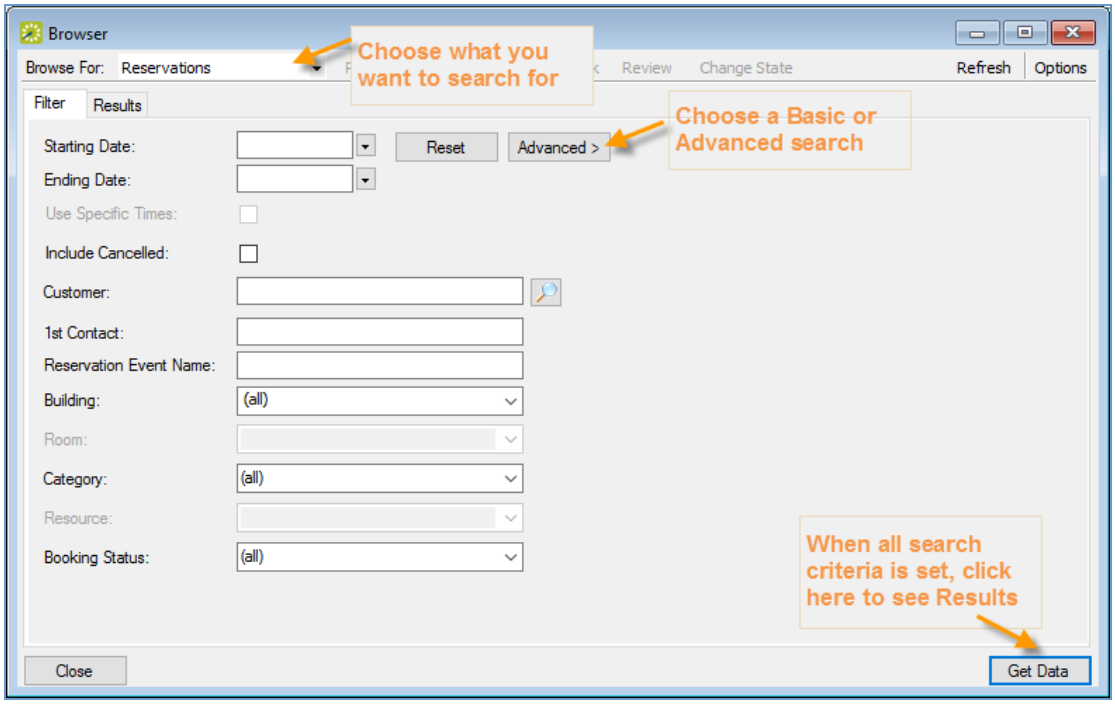
The Everyday User Reservations searching tool is identical to the Everyday User Reservations Browser searching tool with one exception: when the Everyday User Reservations Browser opens for the first time, the Browse For function is set to all Reservations in your organization's database, whereas the Everyday User Reservation tool is set to show only Everyday User Reservations.



CHAPTER 230: Search with the Everyday User Reservations Browser

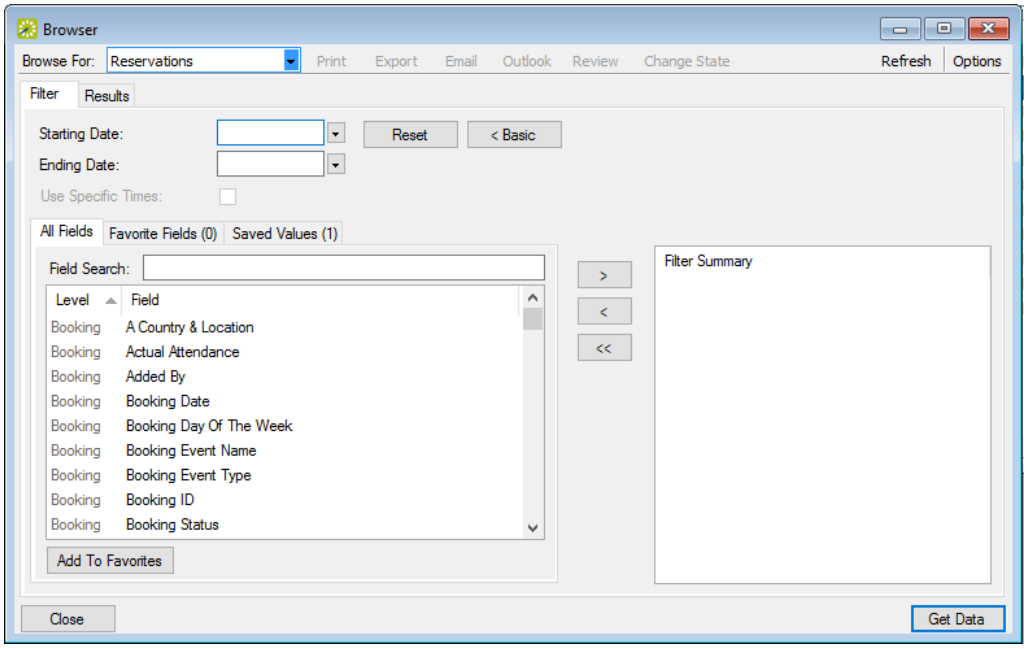
To search using the Everyday User Reservations Browser, do the following:

1. On the EMS toolbar, click the **Everyday User Reservations Browser** icon, the Everyday User Reservations Browser window opens. When the Everyday User Reservations Browser window first opens, it defaults to the **Results** tab, set to the current month and year.



2. Click the **Filter** tab (if needed) to begin setting criteria for your search. You can toggle between a Basic or Advanced using toggle button.

Basic Search

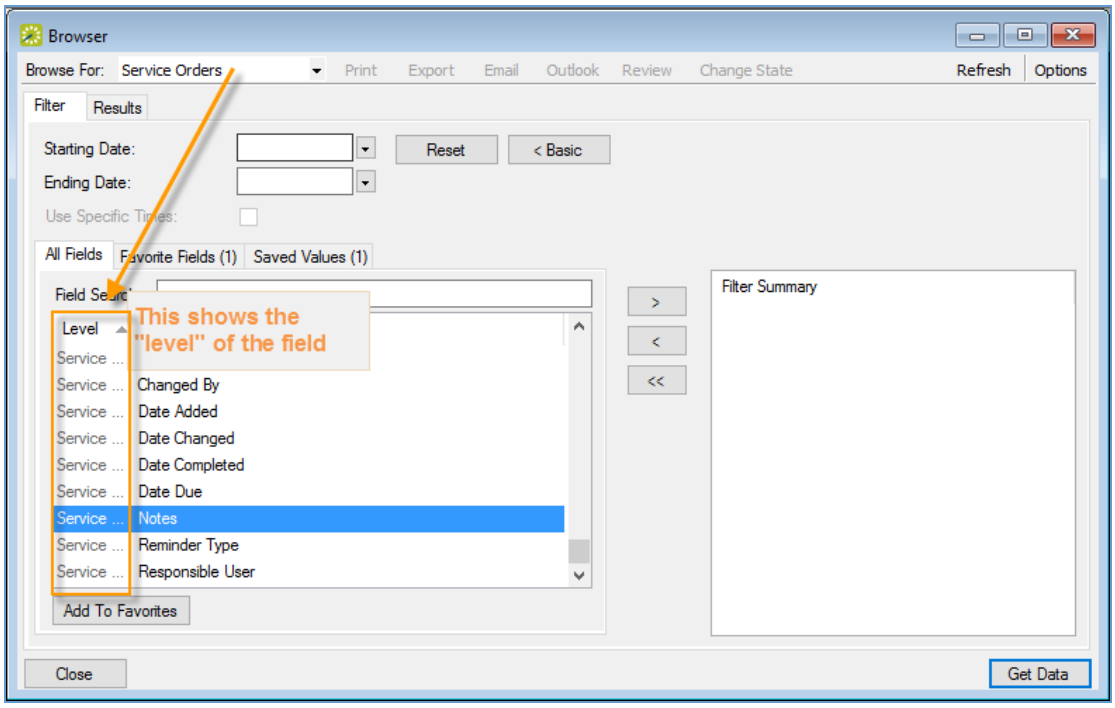


1. Toggle for a **Basic** search. On the **Browse For** field, set the search to focus on reservations, bookings, service orders, resources, everyday user reservations, or a pre-defined query.

2. Enter search criteria using the fields as defined below.

Field	Description
Starting Date Ending Date	These fields set the date range for the search. The default value is the current month and year, but you can change these values if needed.
Use Specific Times	Clicking this option adds specific Starting Time and Ending Time fields to your search criteria.

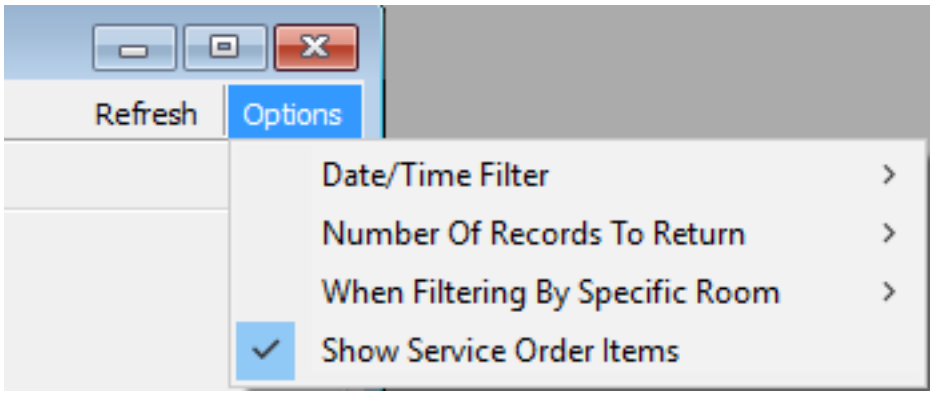
3. You can specify fields from the booking, reservation, service order, and so forth as part of your search criteria by using the arrow buttons to move them from the left panel to the right panel. The level of the field is noted in the list, for example, the "Booking... Room Design" field means your search will pull all events that have the value you specify in the Room Design field at the booking level.



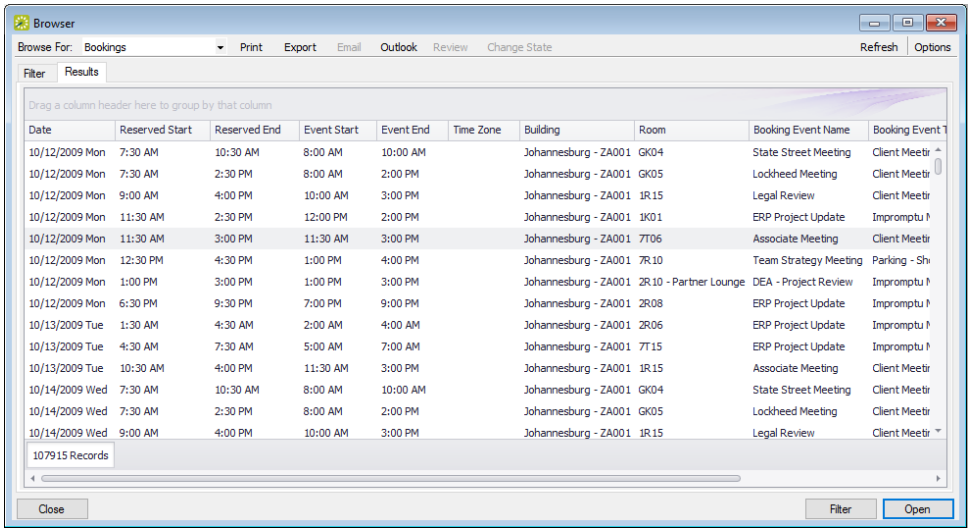
4. When you move a field to the right panel, you will be prompted to enter a field value for which to search.

> **Note:**
> Click **Add to Favorites** to save a field on the **Favorite Fields** tab for future searches. You can also move items from the right panel into the **Favorite Fields** or **Saved Values** tabs in the left panel.

5. Click **Options** to set additional search options.

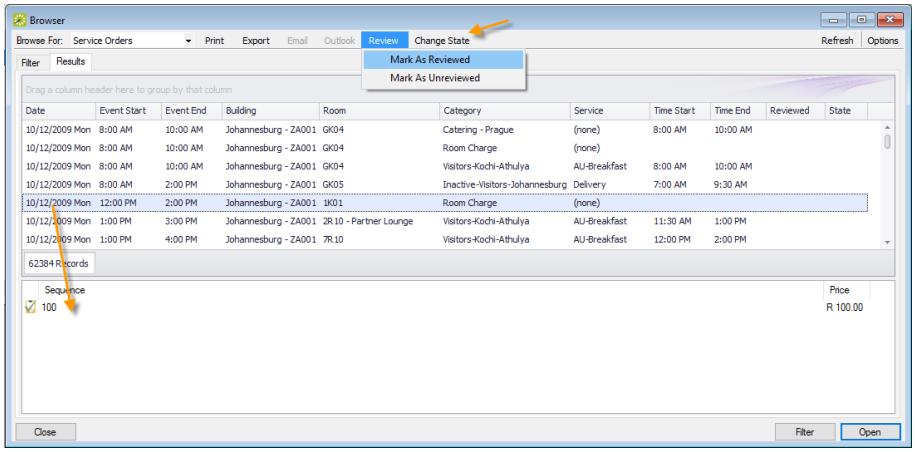


6. Click **Get Data** or **Refresh**. The search results are listed on the **Results** tab in a calendar view.



7. You can do the following from this page:

   - Change the **Browse For** field at the top to refresh the results to focus on reservations, bookings, service orders, resources, everyday user reservations, or pre-defined queries.
   - Open a reservation. booking, service order, etc.: double-click on the item in the results tab to open it in the Navigator.
   - Click **Print** to print the search results.
   - Email attendees: select an event and either click **Email** (if enabled) to start a pre-addressed SMTP email to the group for that event (see Send Email from EMS), or click **Outlook** > **Send Invitation** (if enabled) to message attendees via Outlook. Your Administrator must set a system parameter to enable these functions.
   - Click **Export** to export the search results to a Microsoft Excel spreadsheet.
   - Work with Service orders: To mark Service Orders as Reviewed, select the service order, or CTRL-click to select multiple service orders, and then click **Review** > **Mark as Reviewed**. To change the state of Service Orders (when used), click **Change State**. For detailed instructions in using the page that appears next, see Manage Service Orders.



- Click **Filter** to return to the **Filter** tab, make any necessary changes to the search criteria, and then repeat the search.
- Click **Refresh** to re-query the database based on the current search criteria.

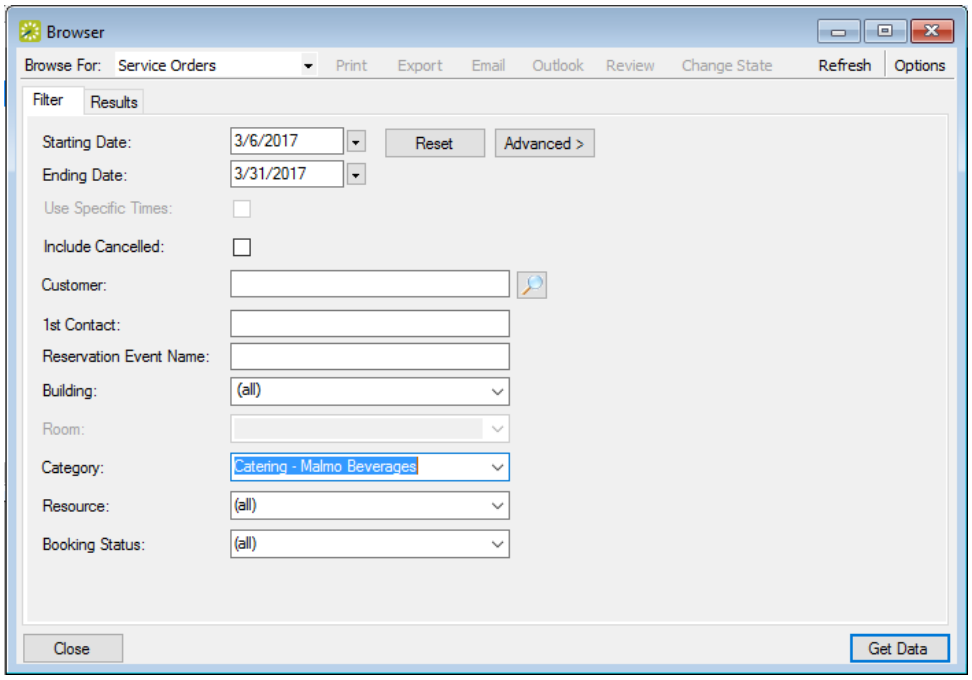
8. Click **Close** to save your changes and settings.

> **Note:**
> To reset the columns to their default values, click the **Reset** button.

Advanced Search

1. Toggle to the **Advance** search using the button.

   Starting Date and Ending Date default to the current month and year.



2. Enter your date range as needed.

3. Click **Options** if you want to add the 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. Enter search criteria using the fields as defined below.

Field	Description
Starting Date Ending Date	The default value is the current month and year, but you can change these values if needed.
Use Specific Times	Clicking this option adds specific Starting Time and Ending Time fields to your search criteria.
Include Canceled	Deselected by default. Select this option to include canceled bookings in the search.
Group	Your Administrator might have re-labeled this field to Customer or Employee. 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 Also: Search for a group and/or contact.

Field	Description
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, Edward, Eddie, 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.
Room/Building	• 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 a 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.

5. Click **Get Data** or **Refresh**. Search results are listed on the Results tab just like they were for your Basic Search, with the same options for working with the results.
6. Click **Close** to save your changes and settings.

CHAPTER 231: Create a Reservation in the Reservation Wizard

You use the Reservation Wizard to check for available space for an event and to make a reservation for the event.

Concept: Reservations are containers for multiple bookings; bookings are individual meetings

When you "make a reservation" in EMS, you are creating the broader rules for events that take place with a similar purpose and involving most of the same people, services, resources, and spaces. When you "book" a meeting, you are creating a meeting within a reservation. See Also: Reservation Structure.

The Reservation Wizard helps you 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 Reservation Wizard, you will:

- Set the event date, time, and status.
- Set the event location.
- Set the event information.



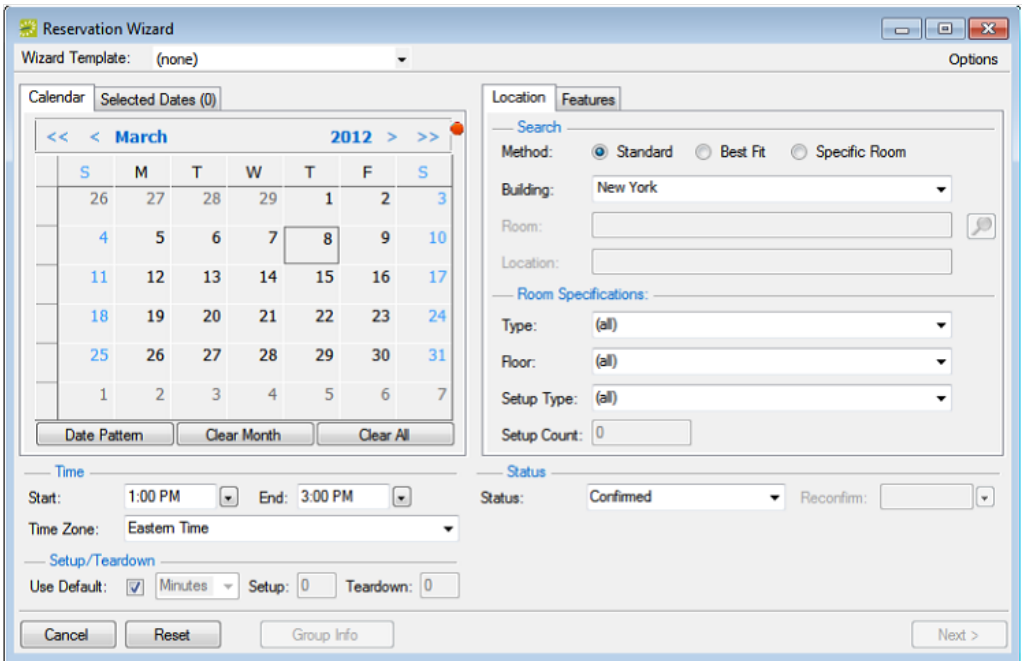
Note:

The following procedure describes how to make a reservation by selecting values for the required and optional fields.

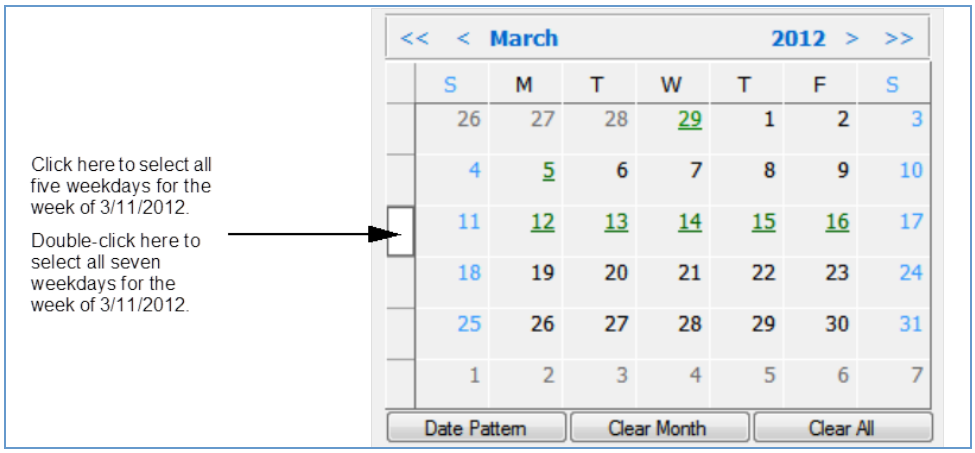
- If your EMS administrator has configured reservation wizard templates, then a Reservation Wizard Template drop-down list is displayed at the top of the Reservation Wizard. You can streamline the booking process by choosing from these templates, which automatically sets the default values for many of 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.

Set the Event Date and Time

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.



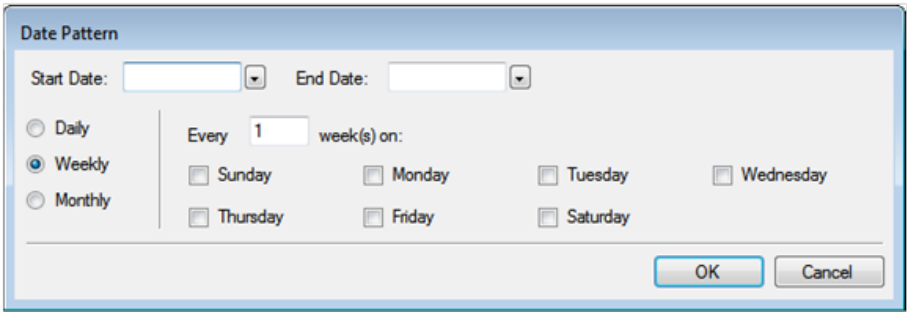
2. If needed, use the scroll features on the top of the Calendar to open the calendar for a different month (< or >) or for a different year (<< or >>). You can also click a month at the top of the calendar to open a drop-down list from which you can select a different month and you can also click a year at the top of the calendar to open a drop-down 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 the next step. Click to pick dates on the calendar. To select all five days in a work week, click in the blank space to the left of the week. To select all seven days in a week, double-click in the blank space to the left of the week.



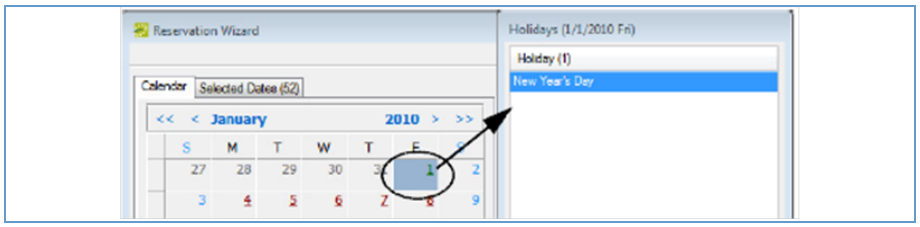
To select every occurrence of a specific day of the week for the displayed month (for example, all Tuesdays in November, 2012), click the heading (S, M, T, and so on) for the day. To select every

occurrence of a specific day of the week shown (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.

- If the event dates do follow a recurrent 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. The steps that you use to create a date pattern in EMS are very similar to the steps that you use to create a date pattern in Microsoft Outlook or in any other calendaring product.



As you specify the event dates, the Selected Dates tab is automatically updated with the selected dates. Dates that are closed are displayed in red on the Calendar tab, holidays are green. These are linked to information about the closure (in the Selected Dates tab, click Holidays). To remove the date your selection, 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.



Viewing information about a holiday or closed date from the Calendar tab

4. Specify the start time and end time for the event:
   - Select a time from the drop-down list for each field.
   - Manually enter the time in each field. When you manually enter the time, you can use a short-cut. 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.

5. Specify 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.
6. 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.

Set the Event Location

You have three options for selecting the event location on the first window of the Reservation Wizard:

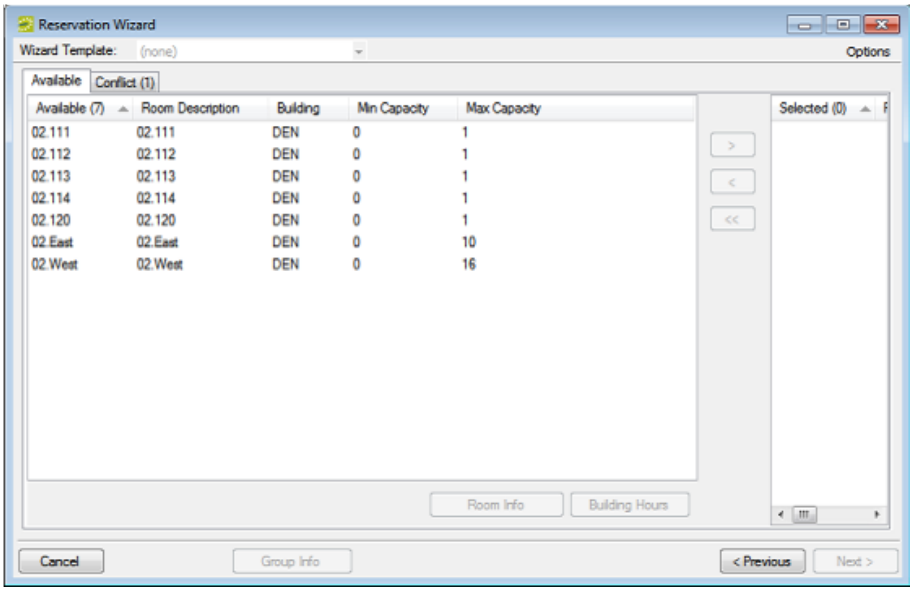
Search Method	Description
Standard	Use this option to display a list of all the available rooms that meet all the requested dates. **Note:** Standard search is required for Video Conference room assignments.
Best Fit	Use this option if no one room can meet all the requested dates. The system lists the 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.
Specific Room	Use this option to confirm the availability and reserve of one specific room for the scheduled event.

Note:
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.

Find 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. Your selection on the Building drop-down list determines the options that are available on the Time Zone drop-down 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.
3. If applicable, select the appropriate time zone for the event.
4. Specify one or more room settings:
   - 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 drop-down 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 drop-down 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 drop-down 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.
5. You can add optional Features on the Features tab.
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.



Example of standard room search results

7. Select the room, or CTRL-click to select the multiple rooms 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.

> **Note:**
> If you select more than one room, all the selected rooms are booked for all the event dates.

10. Click Next.

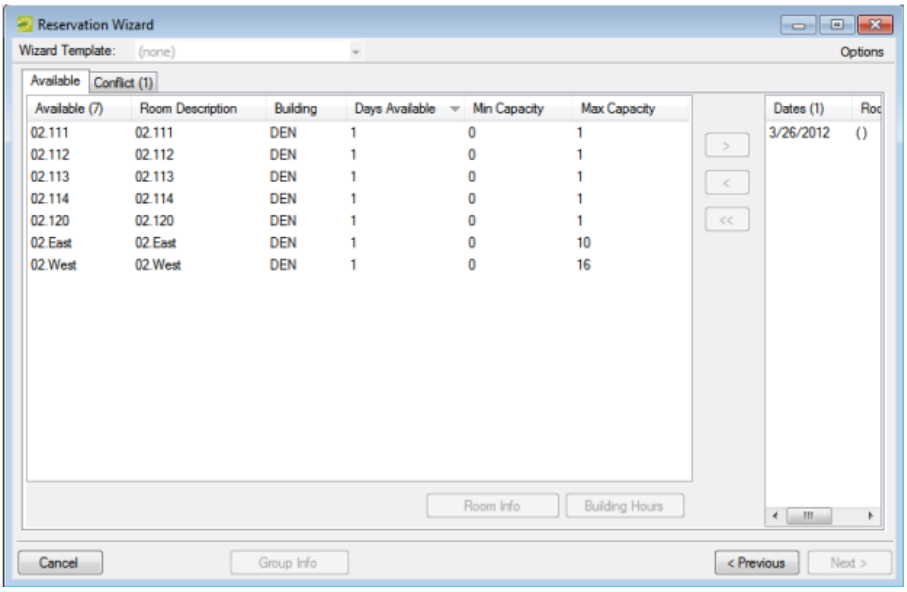
Find a Best Fit Room

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.

> **Note:**
> Your selection on the Building drop-down list determines the options that are available on the Time Zone drop-down 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 drop-down 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 drop-down 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 drop-down 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 edit the reservation later.
5. You can add optional Features for the room on the Features tab.
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.



Example of best fit room search results

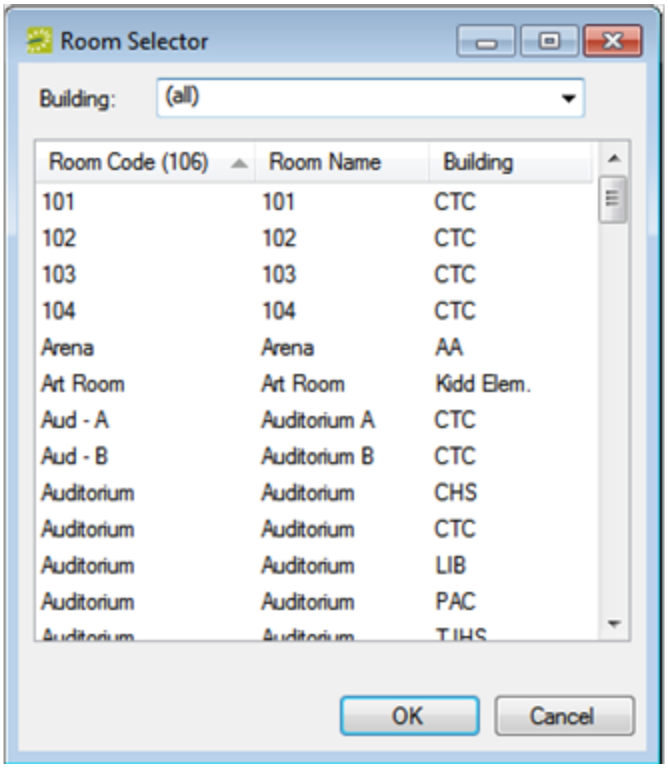
7. Optionally, do one or both of the following; otherwise, go to the next step.
   - To see detailed room information, click Room Info (such as the room properties, pricing, and/or to view an image of the room).
   - To see building hours, click Building Hours (which shows hours when the selected room/building is open on the reserved date).
8. If a room 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 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.

Find 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.



2. To choose a room from list of all rooms in all available buildings, select (all) on the Building drop-down list; then select a room, and then click OK. To select a room in a specific building, area, or view, select it on the Building drop-down list, select the room, and then click OK. If the room is configured as an override room, go to the next step, otherwise, go skip to Step 4.

3. In the Location field, enter the location of the override room, and then click Next skip the remaining steps in this subsection.

4. Click Next. If the event is scheduled for a single date and the room is available, then continue. 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. 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, do one or both of the following; otherwise, go to the next step.

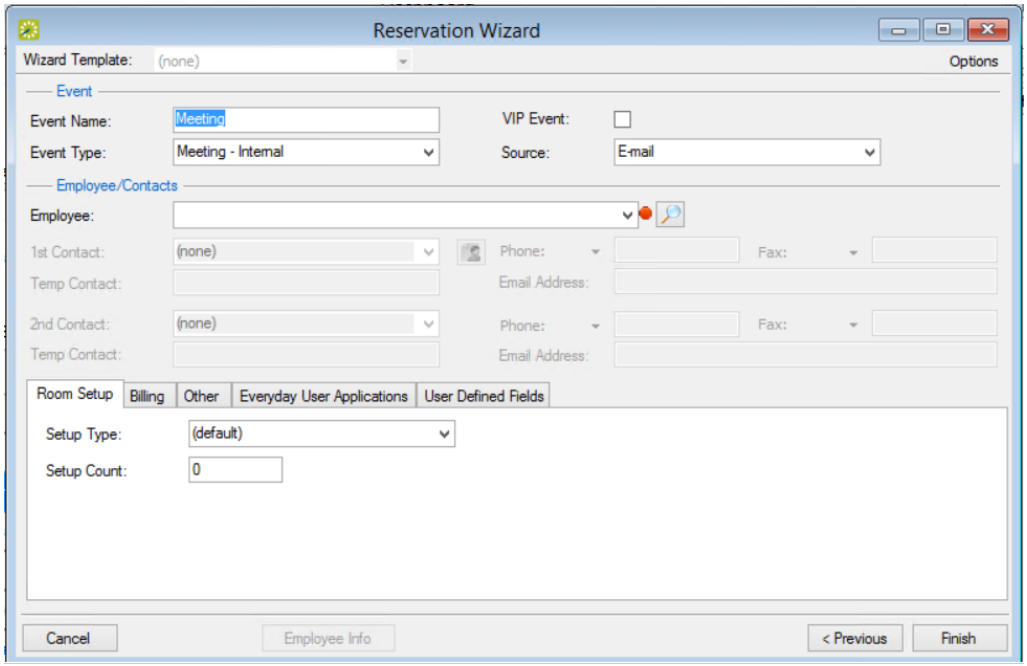
- To see detailed room information, click Room Info (such as the room properties, pricing, and/or to view an image of the room).
- To see building hours, click Building Hours (which shows hours when the selected room/building is open on the reserved date).

6. 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.

Specify 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.



1. Enter event information using the elements in this window (see Reservation Wizard Fields).
2. 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.

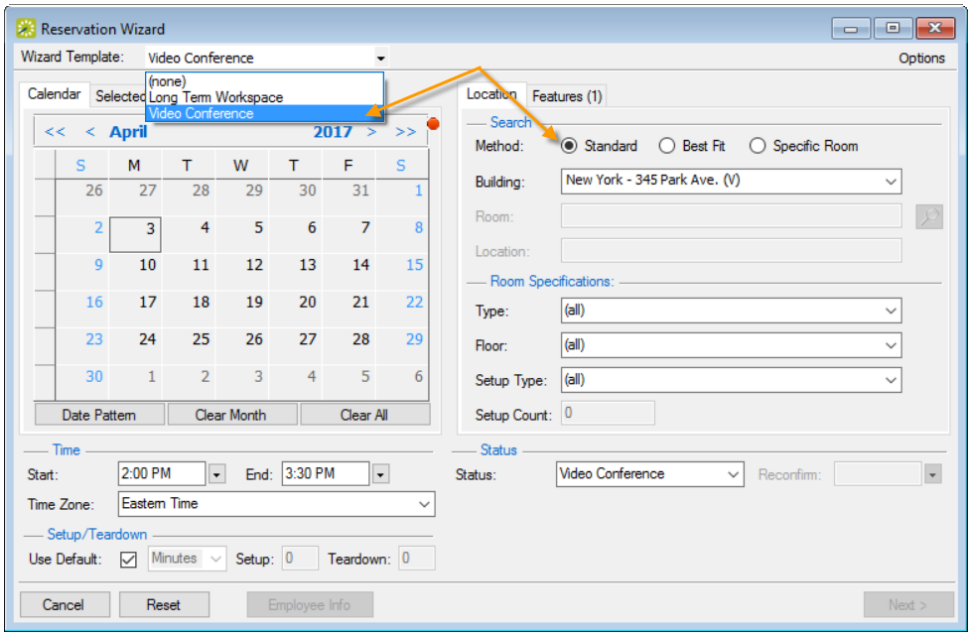
Note:

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 appears stating that your reservation conflicts with an existing reservation.

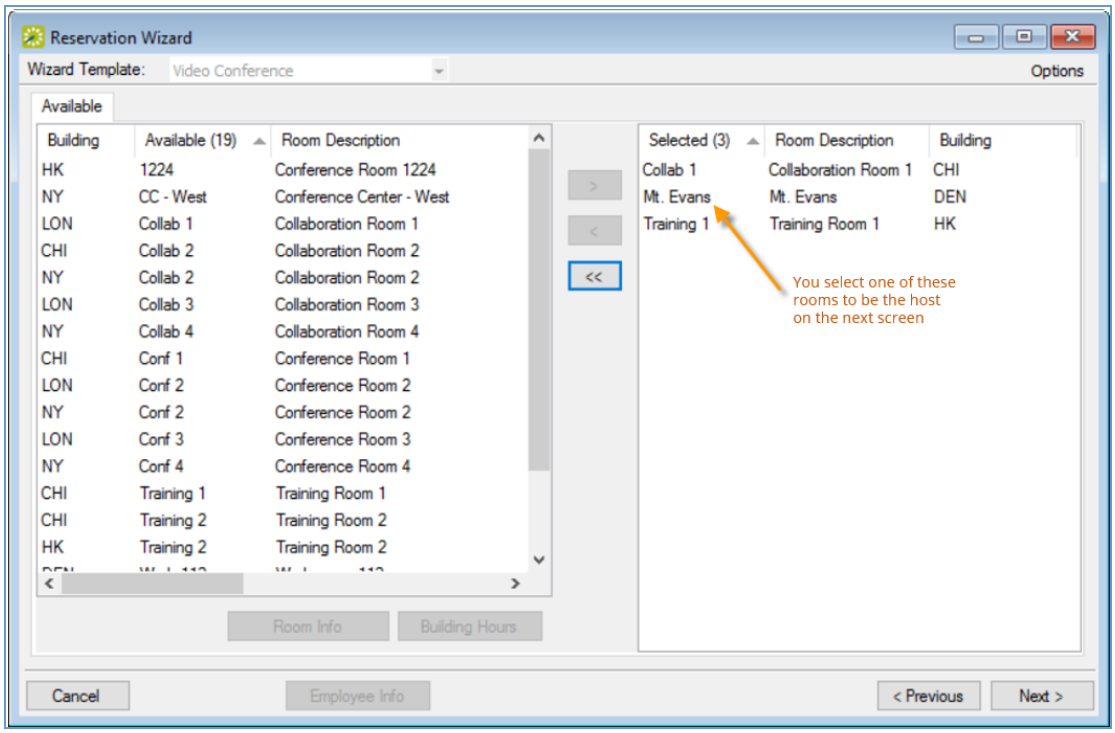
CHAPTER 232: Book a Video Conference

Booking a video conference is basically the same as making a standard reservation, except for a few differences:

1. On the first screen of the Reservation Wizard, choose a video conference template option from the Wizard Template drop-down, as shown in the example below. Your Administrator configures these templates; if none are available, contact your Administrator. Additionally, set the Search method to "Standard."

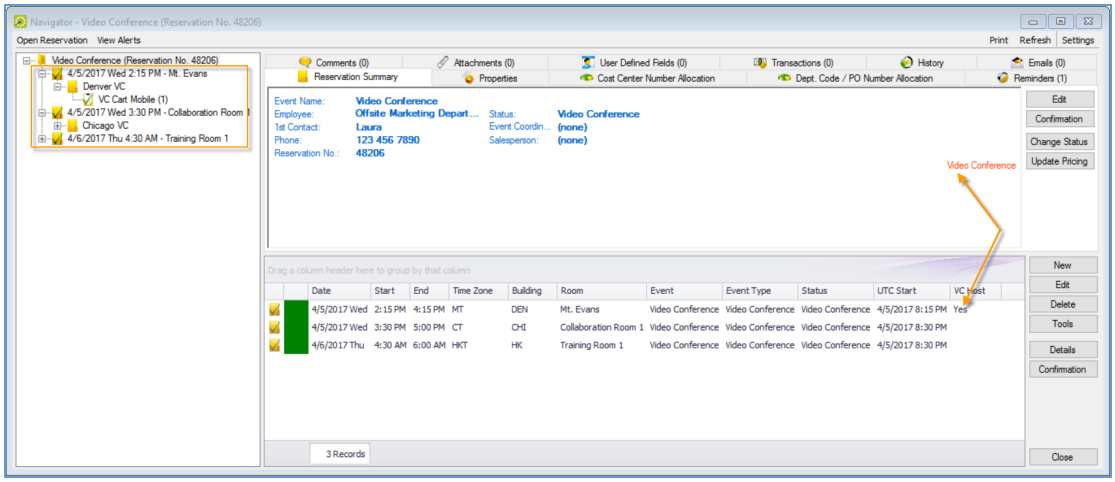


2. You select at least two rooms for video conferences; one is the "host" where the presenter drives the video conference, and the other room(s) are "endpoints" where attendees participate in the video conference. You can have multiple rooms and one host. On the second screen of the wizard where you select rooms for the booking, select all rooms involved including your host room.



3. An additional "Video Conference" tab is available for video conferencing on the third screen of the wizard where you designate one of the rooms as the host.

4. Once you finalize your reservation the host room shows in the Navigator with "Yes" under the VC Host column. Each room shows as a booking under the reservation, and if your Administrator has configured it, resources needed for a video conference, such as a Video Conference cart, are automatically included as details under the bookings.



CHAPTER 233: The Browser

You can use the Browser to search at a very detailed level for reservations, bookings, service orders, resources, everyday user reservations, and pre-defined queries. The results are listed in a calendar view.



Browser Tool Button

Using the Browser, you can perform a basic search or an advanced search:

- In a basic search, you specify basic information 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 search using the Browser, see Search with the Browser.

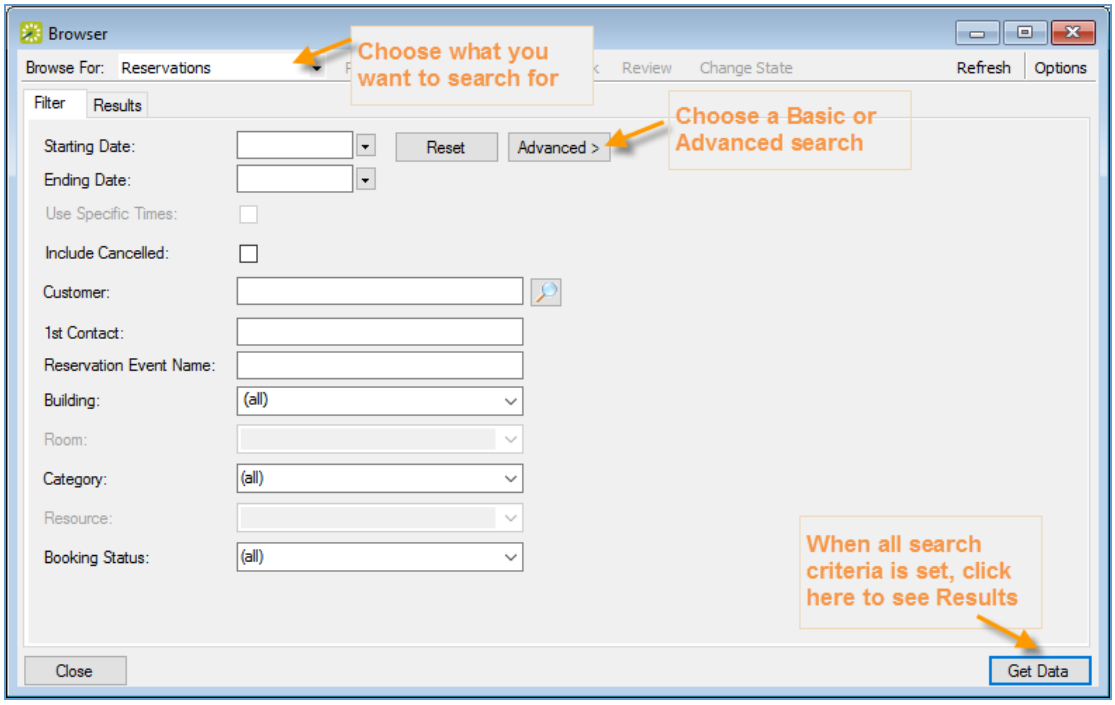
Concept: An everyday user reservation is any reservation that a user has submitted through EMS Web App.

The Everyday User Reservations 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 all Reservations in your organization's database, whereas the Everyday User Reservation tool is set to show only Everyday User Reservations. Basically, although this section is written from the perspective of using the Browser, all the information can be applied when using the Everyday User Reservation searching tool.

CHAPTER 234: Search with the Browser

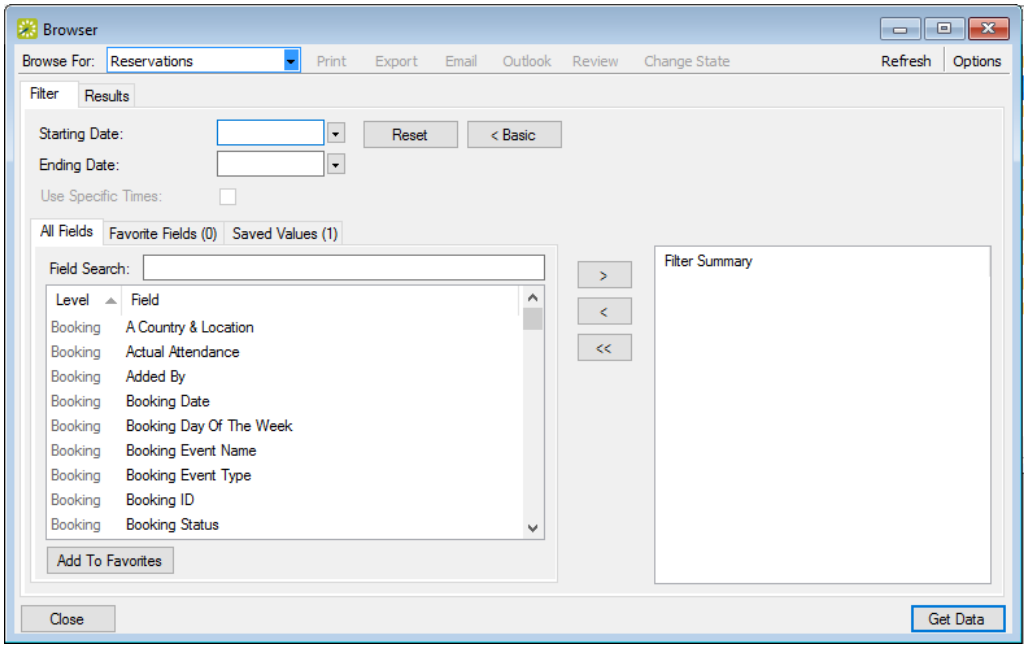
To search using the browser, do the following:

1. On the EMS toolbar, click the Browser icon. the Browser window opens. When the Browser window first opens, it defaults to the **Results** tab, set to the current month and year.



2. Click the **Filter** tab (if needed) to begin setting criteria for your search. You can toggle between a **Basic** or **Advanced** using toggle button.

Basic Search

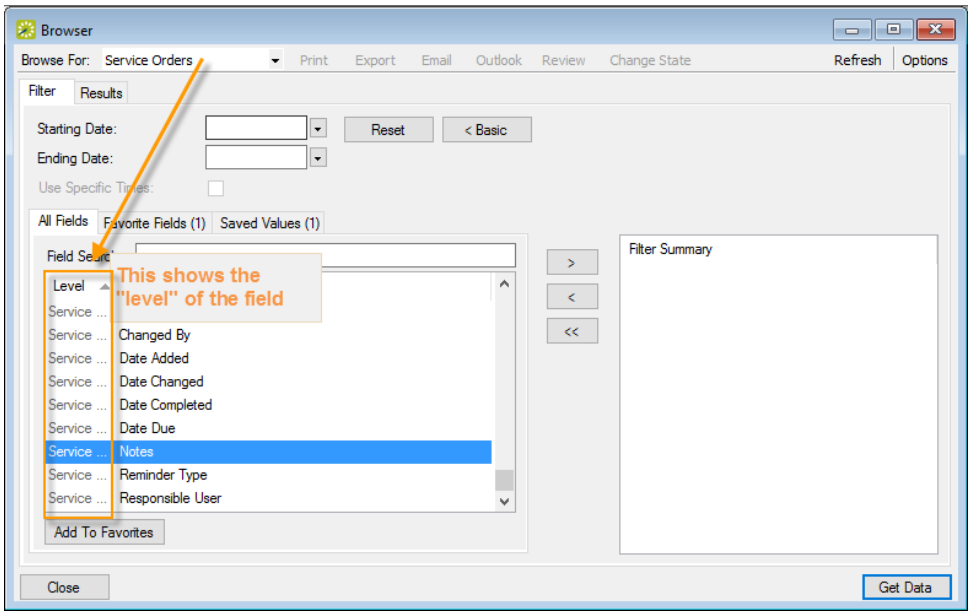


To perform a basic search using the browser, follow these steps:

1. Toggle for a Basic search. On the **Browse For** field, set the search to focus on reservations, bookings, service orders, resources, everyday user reservations, or a pre-defined query.
2. Enter search criteria using the fields as defined below.

Field	Description
Starting Date Ending Date	These fields set the date range for the search. The default value is the current month and year, but you can change these values if needed.
Use Specific Times	Clicking this option adds specific Starting Time and Ending Time fields to your search criteria.

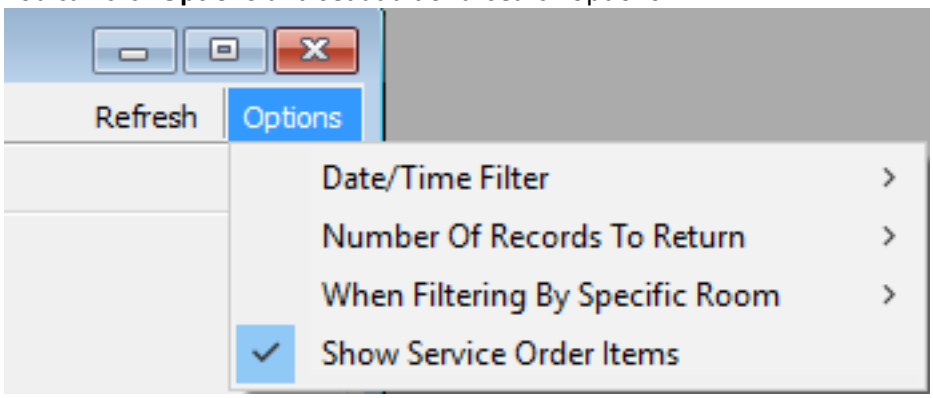
3. You can specify fields from the booking, reservation, service order, and so forth as part of your search criteria by using the arrow buttons to move them from the left panel to the right panel. The level of the field is noted in the list, for example, the "Booking... Room Design" field means your search will pull all events that have the value you specify in the **Room Design** field at the booking level.



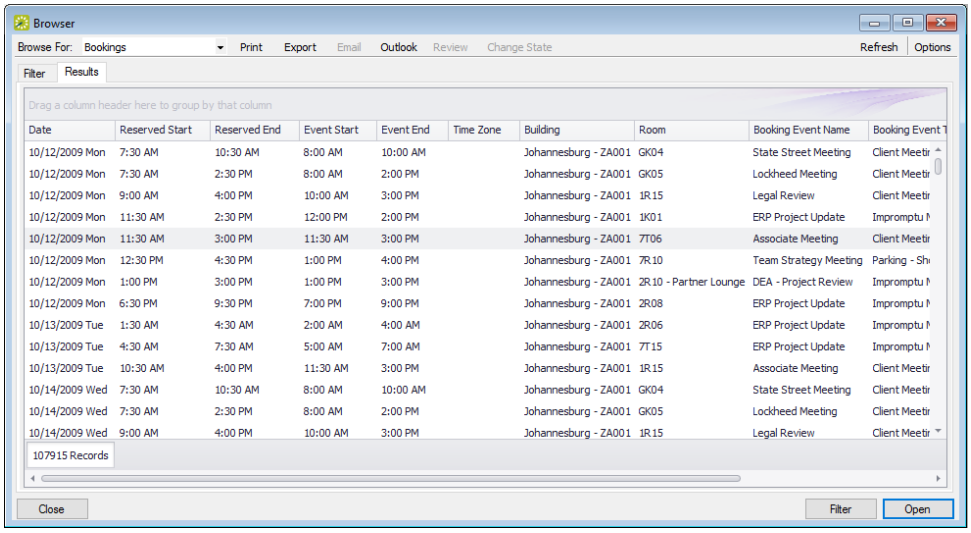
When you move a field to the right panel, you will be prompted to enter a field value for which to search.

> **Note:**
> Click **Add to Favorites** to save a field on the **Favorite Fields** tab for future searches. You can also move items from the right panel into the **Favorite Fields** or **Saved Values** tabs in the left panel.

4. You can click **Options** and set additional search options.

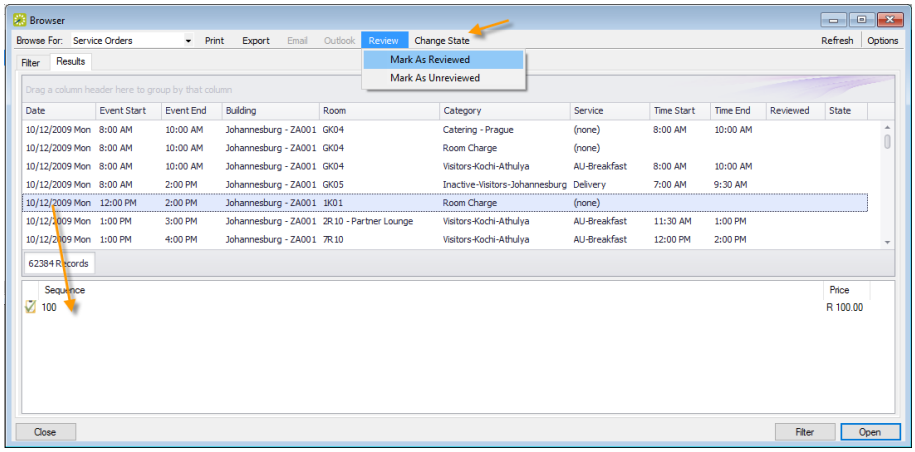


5. Click **Get Data** or **Refresh**. The search results are listed on the **Results** tab in a calendar view.



You can do the following from this page:

- Change the **Browse For** field at the top to refresh the results to focus on reservations, bookings, service orders, resources, everyday user reservations, or pre-defined queries.
- Open a reservation, booking, service order, etc. by double-clicking on the item in the results tab to open it in the Navigator.
- Click **Print** to print the search results.
- Email attendees by selecting an event and either click **Email** (if enabled) to start a pre-addressed SMTP email to the group for that event (See Also: Send Email from EMS), or click **Outlook** > **Send Invitation** (if enabled) to message attendees via Outlook. Your Administrator must set a system parameter to enable these functions.
- Click **Export** to export the search results to a Microsoft Excel spreadsheet.
- Work with Service orders: To mark Service Orders as **Reviewed**, select the service order, or CTRL-click to select multiple service orders, and then click **Review** > **Mark as Reviewed**. To change the state of Service Orders (when used), click **Change State**. For detailed instructions in using the page that appears next, see Manage Service Orders.



- Click **Filter** to return to the **Filter** tab, make any necessary changes to the search criteria, and then repeat the search.
- Click **Refresh** to re-query the database based on the current search criteria.

6. Click **Close** to save your changes and settings.

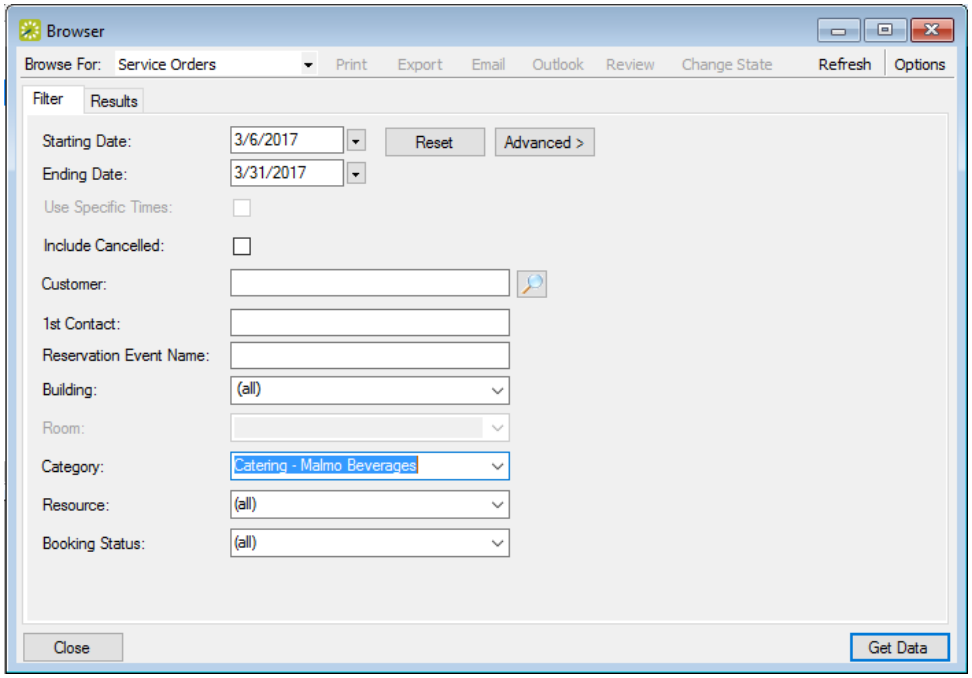
Note:

To reset the columns to their default values, click the **Reset** button.

Advanced Search

To perform an advanced search using the browser, follow these steps:

1. Toggle to the Advance search using the button.



2. **Starting Date** and **Ending Date** default to the current month and year. Enter your date range as needed.
3. Click **Options** if you want to add the 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. Enter search criteria using the fields as defined below.

Field	Description
Starting Date Ending Date	The default value is the current month and year, but you can change these values if needed.
Use Specific Times	Clicking this option adds specific Starting Time and Ending Time fields to your search criteria.
Include Canceled	Deselected by default. Select this option to include canceled bookings in the search.
Group	Your Administrator might have re-labeled this field to Customer or Employee. If the pre-defined list of groups is too extensive to scroll, then click the Search

Field	Description
	icon to open the Groups window and search for a specific group. See Also: Search for a group and/or contact.
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, Edward, Eddie, 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.
Room/Building	• 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 a 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.

5. Click **Get Data** or **Refresh**. Search results are listed on the **Results** tab just like they were for your Basic Search, with the same options for working with the results.
6. Click **Close** to save your changes and settings.

CHAPTER 235: People: 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.

Concept: Attendees= Invitees; Group = Meeting Organizers

Attendees get invited, and groups and/or first contacts get notices about changes to the meeting on the Dashboard. Additionally, your Administrator sets the label for the Group field, so the name might vary; in the example below, it is labeled "Customer." A Group is responsible for the meeting, and can designate a First Contact to oversee questions, changes, and updates to the meeting.

This section provides the following information about groups and contacts:

- Search for People
- Search for and Configure Groups or Individuals
- Add or Edit Profile Information for People and Groups
- Create an Everyday User from a Group
- Assign an Everyday User to a Group
- Configure Contacts for a Group
- Import Groups
- Print and Export Group Everyday User Information
- Print and Export Group Information
- Work with Reservations for a Group
- Email a Group

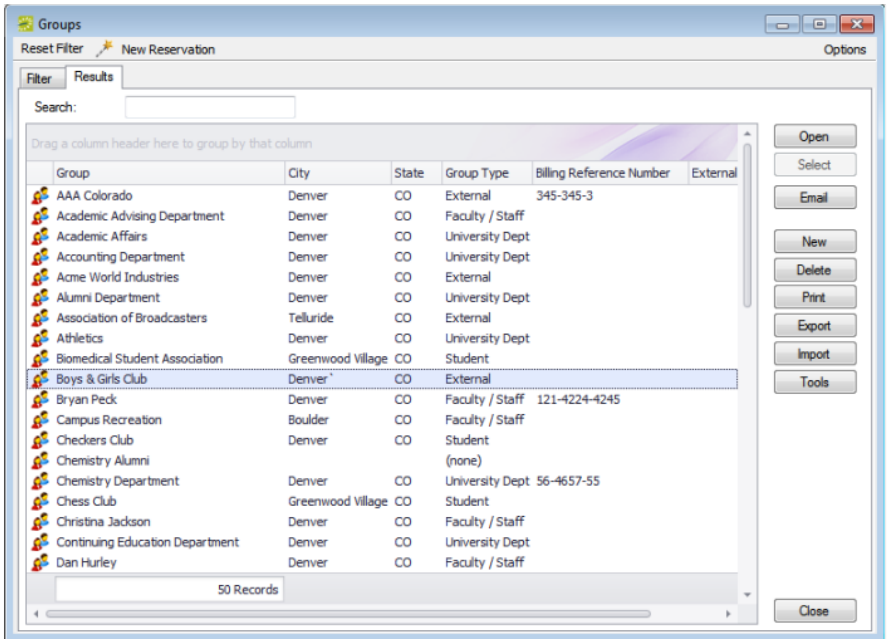
CHAPTER 236: Search for People

Your organization might have re-labeled this button, "Customers" or "Employees." 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 defined EMS Desktop Client before you can make reservations for it. Optionally, if you want to first confirm that a group has not already been configured, then you can search for the group.

Note:

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.

1. On the toolbar, click the **Groups** icon. The Groups window opens on the Results tab is the active tab, which lists the first 1000 groups in your EMS database that are Active.



Note:

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 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.
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.



Note:

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 Association of Broadcasters and Biomedical Student Association.

CHAPTER 237: Search for and Configure Groups or Individuals

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.

Note:

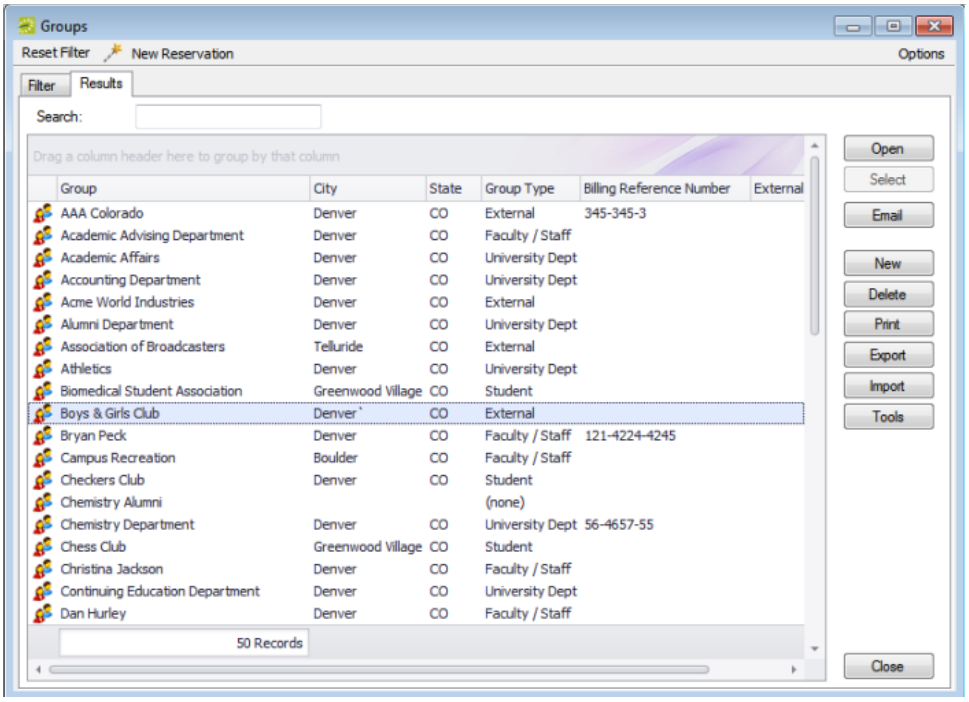
Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.

Note:

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.

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.



Note:

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 Association

Option	Description
	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.
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.

Note:
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 Association of Broadcasters and Biomedical Student Association.

Configure Groups

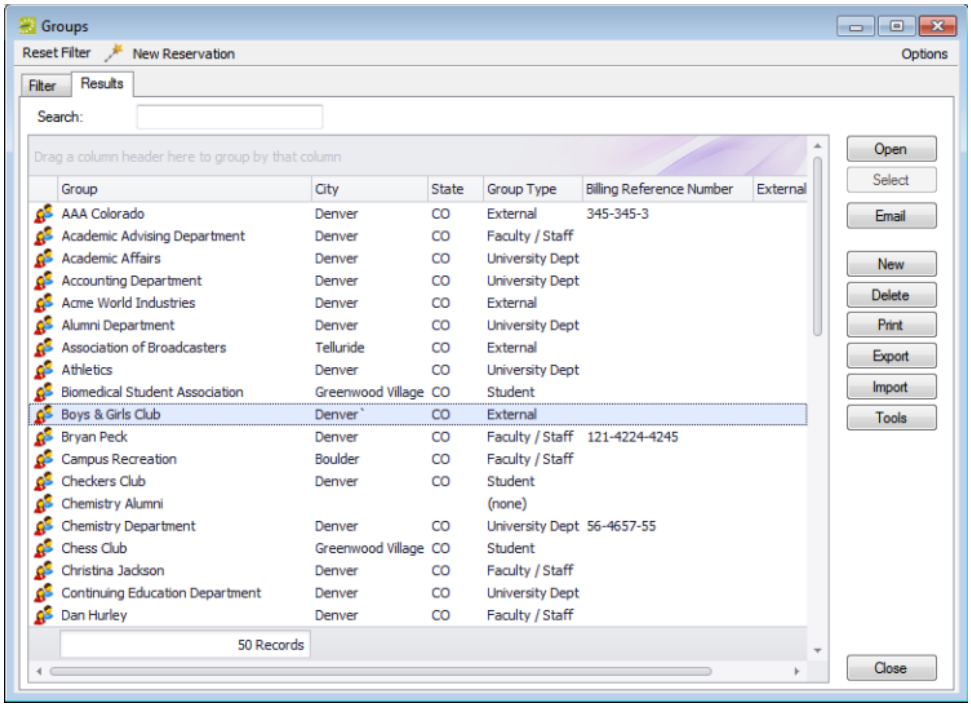
Typically, your EMS administrator carries out basic configuration of the groups for which you need to make reservations. You always have the option of modifying any group that your EMS administrator has configured and you always have the option of configuring new groups when needed.

Note:

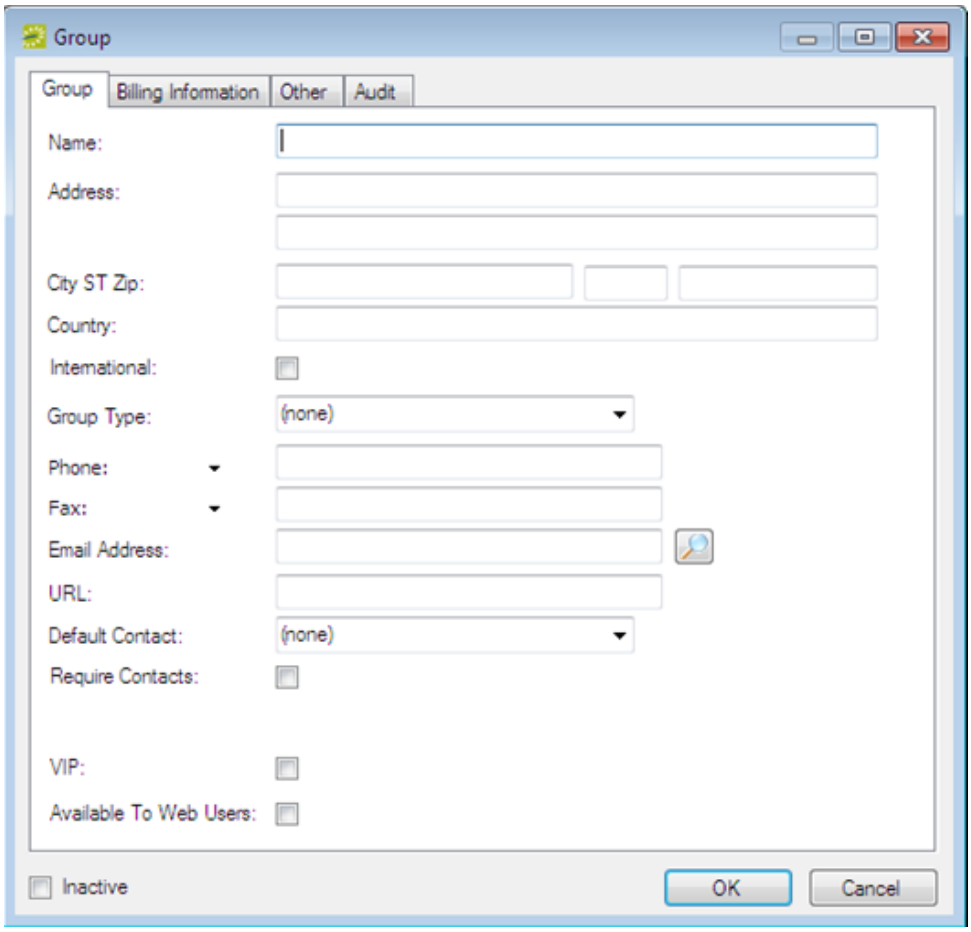
Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured. See Search for a group and/or contact.

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 up the first 1000 groups that are currently configured in your EMS database and that have a status of Active.



2. Click **New**. The Group dialog box opens. The **Group** tab is the active tab.



3. Enter the summary information for the new group.

> **Note:**
> 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.

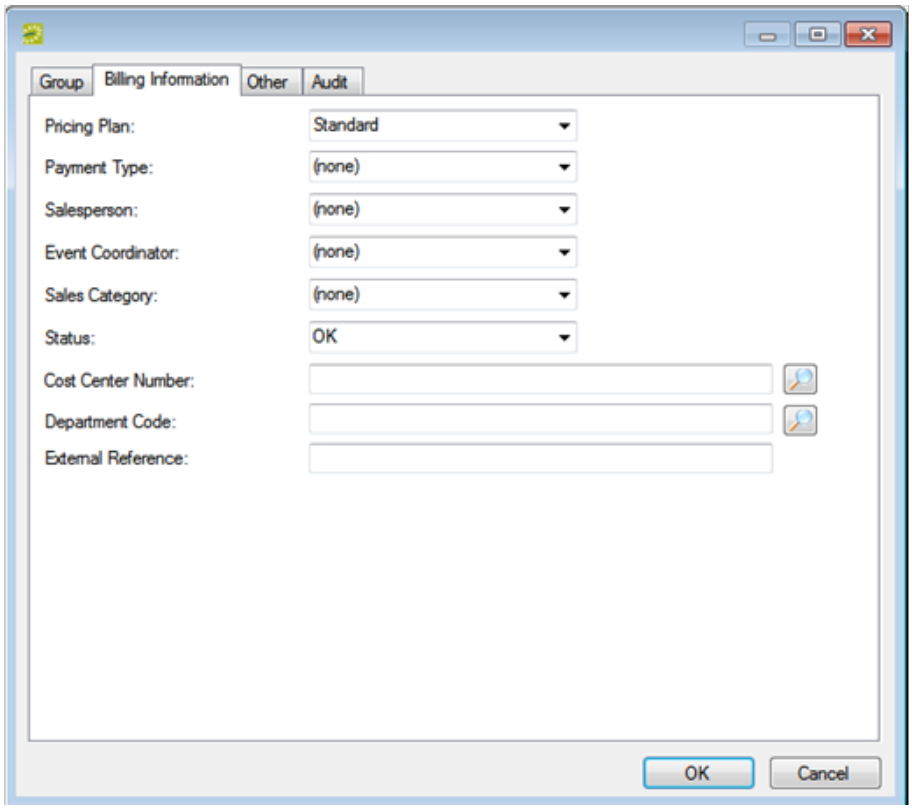
Field	Description
Name	Required field. The name of the group.

Field	Description
	Note: This is the only required information for the group. All other information on all tabs is optional and can be added at a later date when needed. 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 drop-down 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.

Field	Description
	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 website 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.



Note:
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

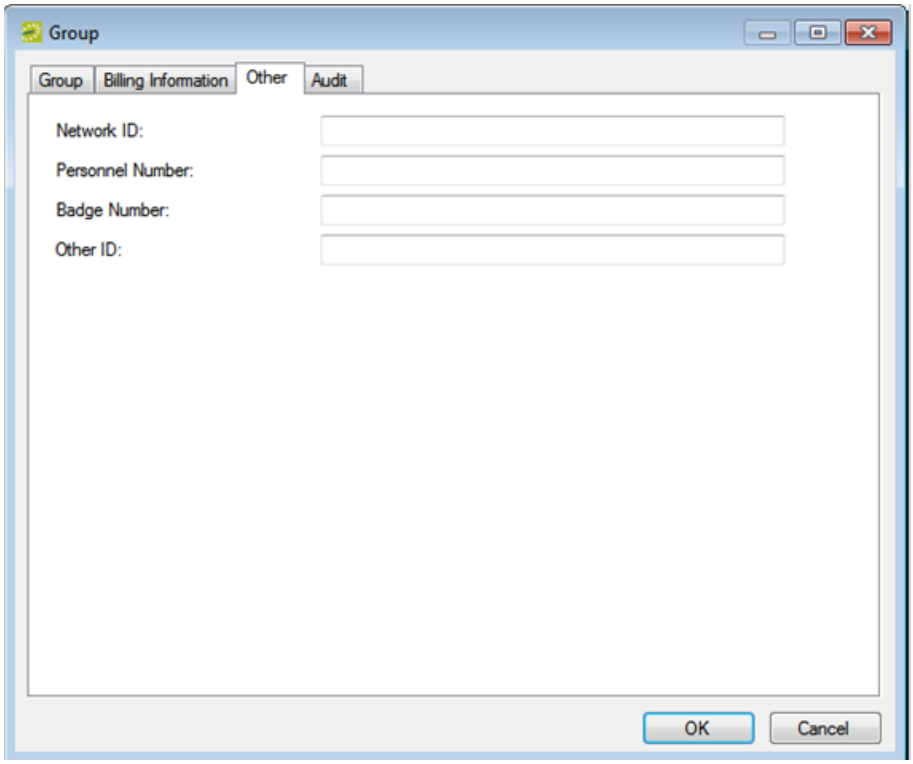
Note:
The values that you specify here are the default values that are applied when a new reservation is made for the group. Any EMS user can change these values if needed.

Pricing Plan	Pick a pricing plan.

Option	Description
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 Configure Additional Information for a Group.
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.

Option	Description
	Note: To define a list of eligible PO numbers that are specific to the group, see Configure Additional Information for a Group.
External Reference	Links the group to a web user record and/or HR Toolkit.
Account	Pick an account.

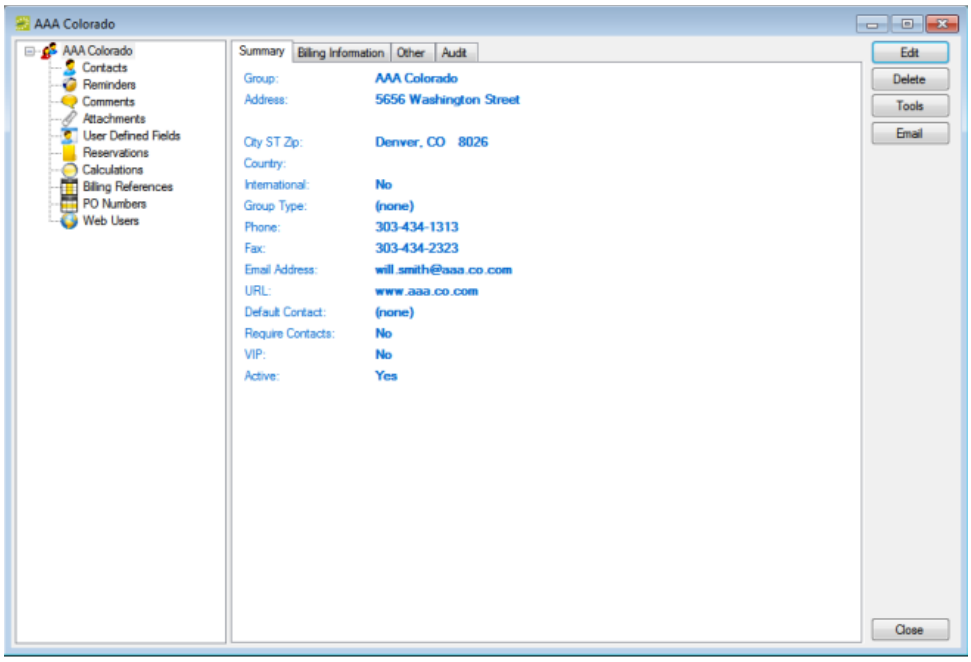
- Open the **Other** tab and add any other identifying information for the group as needed.



Option	Description
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.

Option	Description
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. You can use the options on this window to carry out additional configuration for the group. See Configure Additional Information for a Group.



Example of a group-specific window

CHAPTER 238: Add or Edit Profile Information for People and Groups

If authorized, you might be able to add or change profile information about groups or individuals in EMS Desktop Client.

To work with group or individual user profile information, you will:

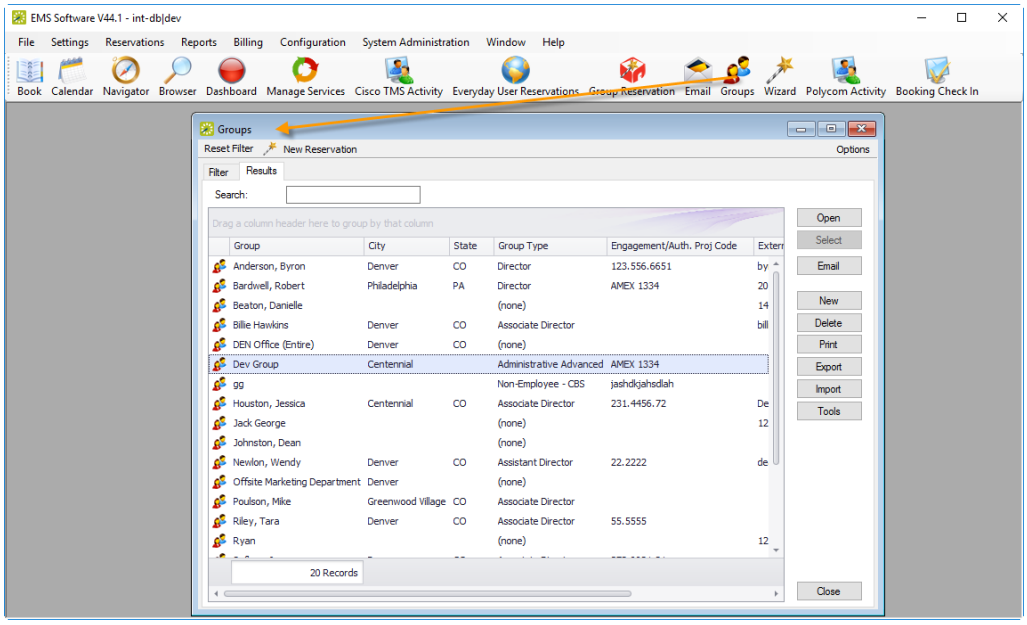
- Open the Groups window.
- Search for existing Groups or Individuals.
- Add or Modify Basic Profile Information.
- Add or Modify Details for Groups/Individuals.
  - Contacts
  - Reminders
  - Comments
  - Reservations
  - Calculations
  - Everyday Users
  - Assign a Group to an Everyday User

Concept: Information on a Group or Individual Profile Is Used For Reservations for That Group or Individual

The values you specify here are become available when a new reservation is made for the group or individual. A user can change these values if needed during the booking process.

Open the Groups Window

1. On the toolbar, click the Groups icon. The Groups window opens on the Results tab is the active tab, which lists the first 1000 groups in your EMS database that are Active.



Note:

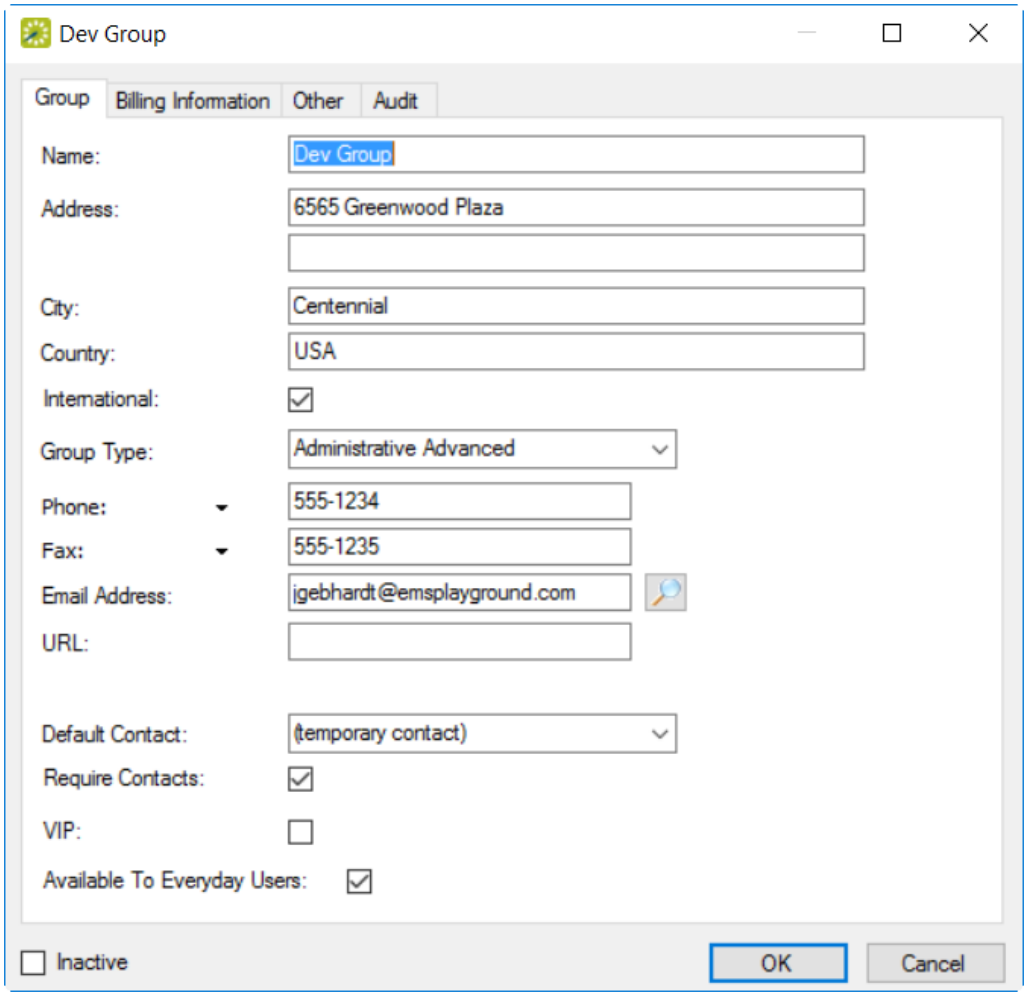
For instructions in filtering and navigating the list of groups shown above, See Also: Search for People.

Search for Existing Groups or Individuals

The profile page for the group or individual displays, dividing information into a left panel of hierarchical details about the group or individual, and a right panel showing basic information divided into four tabs: Summary, Billing Information, Other, and Audit.

2. From the Groups window:
   - To create a new group or individual profile, click the **New** button.
   - To edit an existing one, find and select the group or individual profile you want to Edit and then click Open, and on the profile page, click **Edit**.

The following dialog appears, where you can begin working with the basic profile information for the group or individual.



Add or Modify Basic Profile Information

3. On each tab on the dialog shown above, and enter or change information as needed.

Group Tab

FIELD	DESCRIPTION
Name	Required field. The name of the group. **Note:** The name can be a maximum of 50 characters, including spaces.
Address	The street or mailing address for the group.

FIELD	DESCRIPTION
City ST Country Zip	
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 drop-down 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 Search 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 website on the EMS Web App.
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.

FIELD	DESCRIPTION
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

Billing Information Tab

OPTION	DESCRIPTION
Pricing Plan	Pick a pricing plan.
Account	Pick an account.
Payment Type	Pick a payment type.
Salesperson	Pick the salesperson for the event.
Event Coordinator	Pick the event coordinator for the group.
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.
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.
External Reference	Links the group to an outside EMS Desktop Client, if needed.

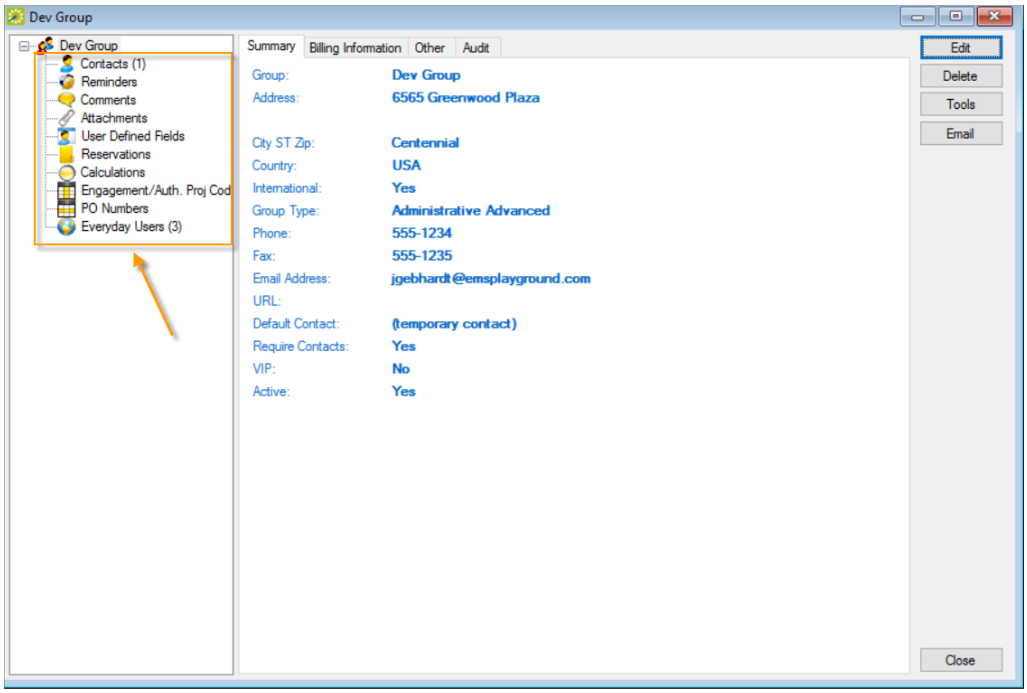
Other Tab

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.

4. After you finalize the information, click **OK**. You return to the Group profile window with the group still selected.

Add or Modify Details for Groups/Individuals

5. To begin this process, navigate to the group or individual profile page you want to work with (see Step 2 above).



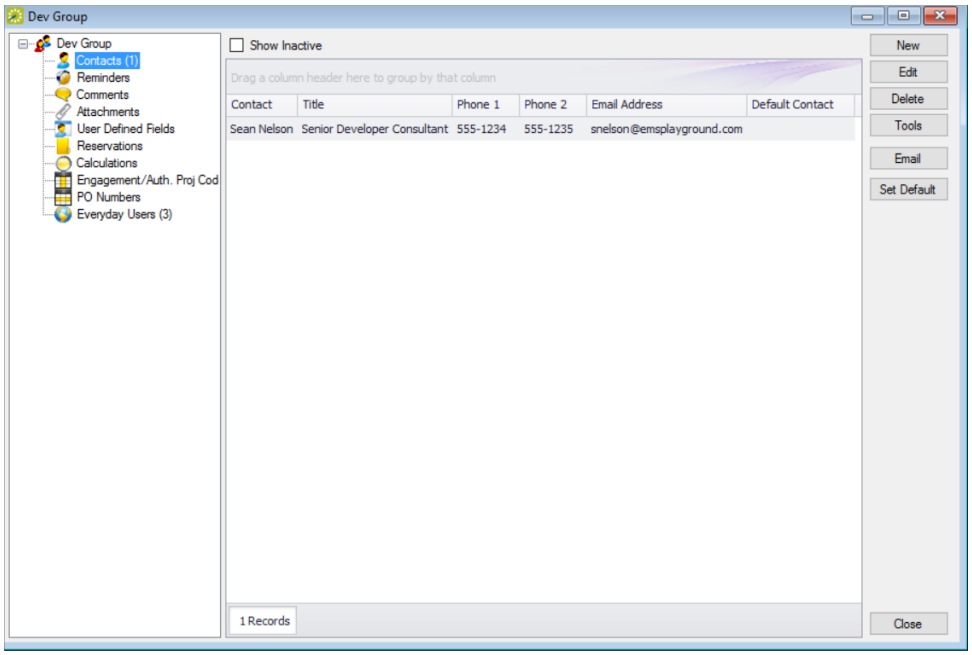
From the profile page for the group or individual, you can work with details about a group from the left panel.

Note:
Adding and modifying information for a group or individual becomes fairly self-explanatory after the first few tries. This topic provides guidance and tips only where the workflow or field definitions might not be obvious, on the following types of information:

1. Contacts
2. Reminders
3. Comments
4. Reservations
5. Calculations

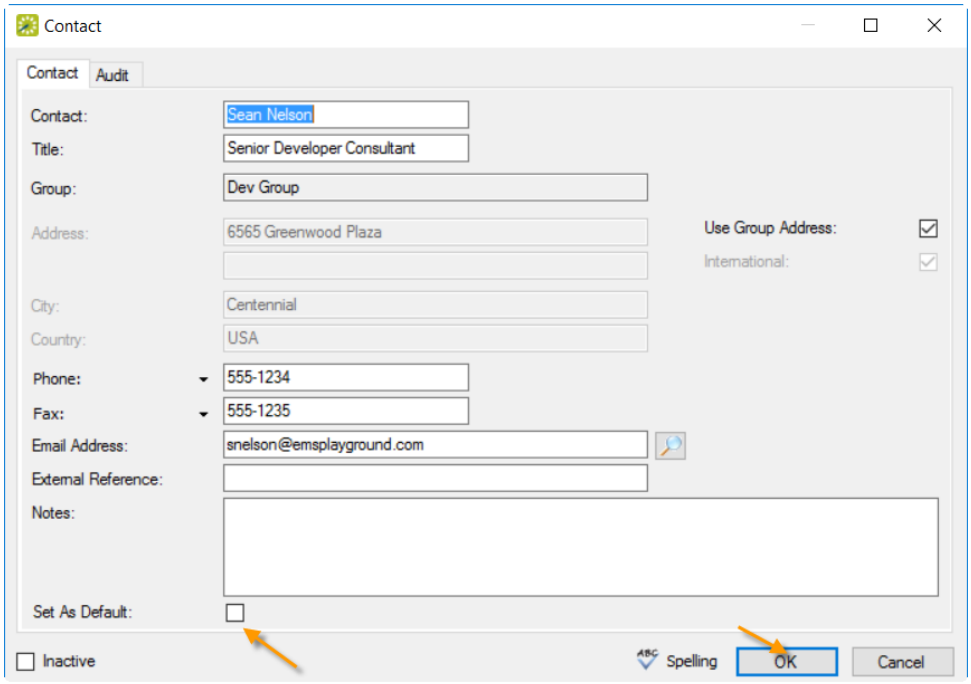
Add or Modify Contacts

1. In the left pane, select **Contacts**. Contacts for the group show in the right pane of the window. When a reservation is being made for this group or individual, the contacts defined here will be available for selection.



   - To add a new contact, click New.
   - To modify an existing contact, select the contact and click Edit.

2. Enter or edit information for the contact as needed using the field definitions below.



Note:

You can set this contact as the default (First Contact) on new reservations for this group or individual using the Set as Default checkbox here or the Set Default button on list of contacts (above).

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

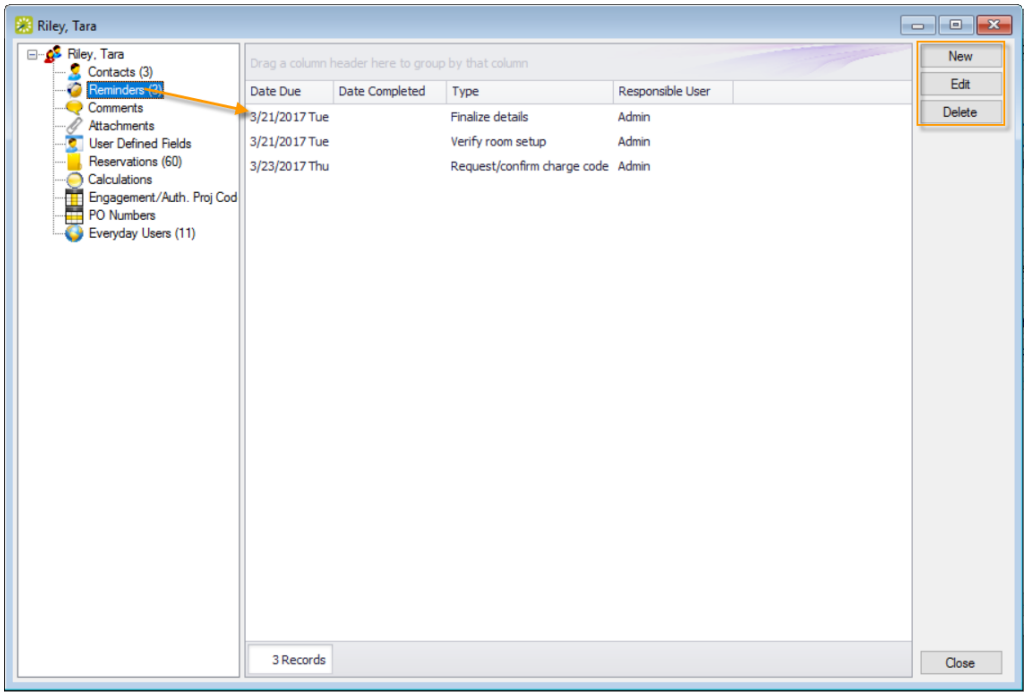
Field	Description
	enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone Fax	The phone number and fax number for the group. **Note:** The Phone and Fax fields have a drop-down list available on which you 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, you can click Search to open a Global Address lookup.
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.

Field	Description
	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. 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, 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.

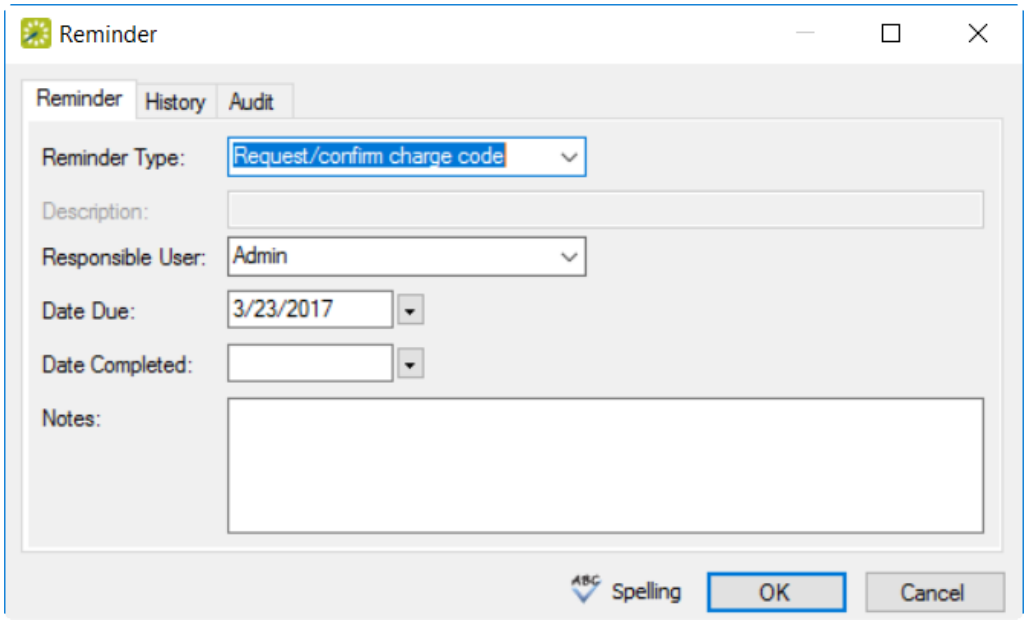
3. When finished, click **OK** to return to the group profile page.

Add or Modify Reminders

1. In the left pane, select **Reminders**; all reminders for the group or individual show on the right pane.



2. Edit an existing reminder or create a New one.



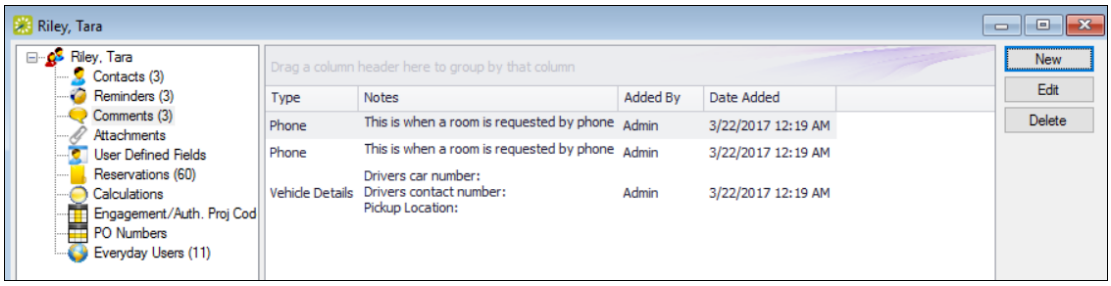
Note:

Leave **Date Completed** blank so that the reminder shows on the Dashboard for the group or individual you are editing. In the Notes field, enter any further explanation or information about the reminder.

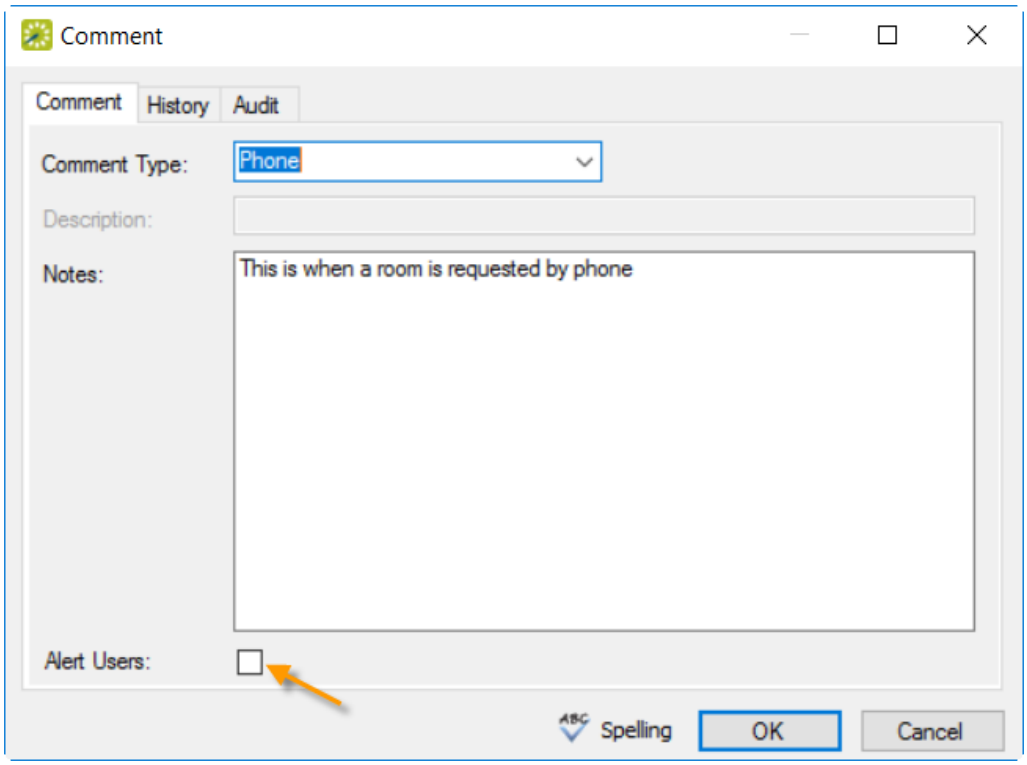
3. When finished, click **OK** to return to the group profile page.

Add or Modify Comments

1. In the left pane, select **Comments**; all reminders for the group or individual show on the right pane.



2. Edit an existing comment or create a New one.



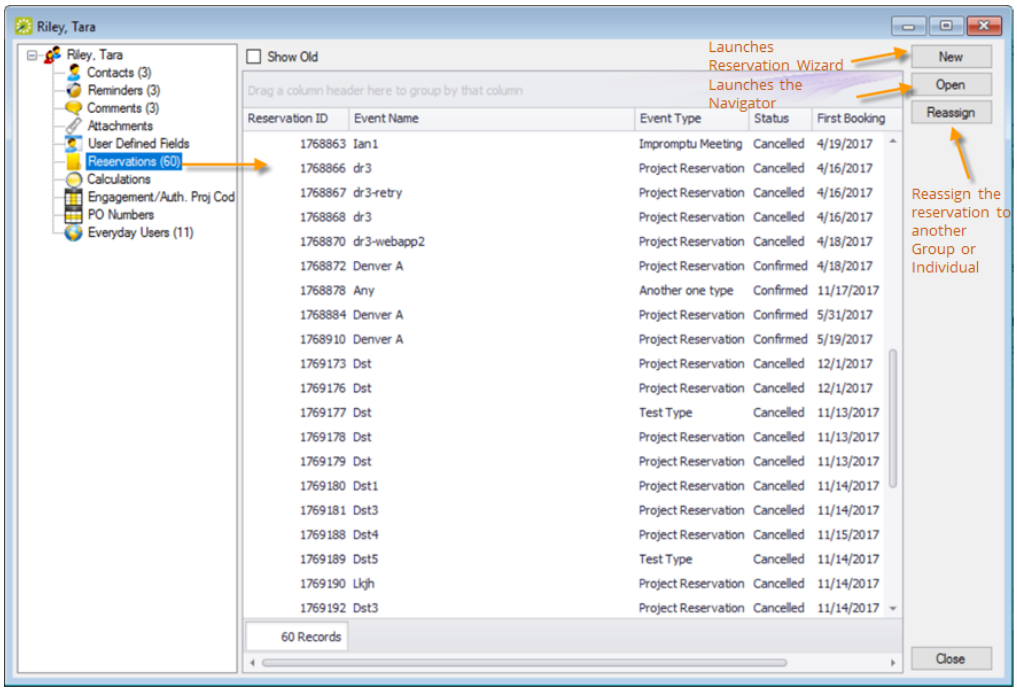
Note:

Choose a pre-configured 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. Select the **Alert Users** checkbox if you want the Alert to be highlighted on the group/individual dashboard.

3. When finished, click **OK** to return to the group profile page.

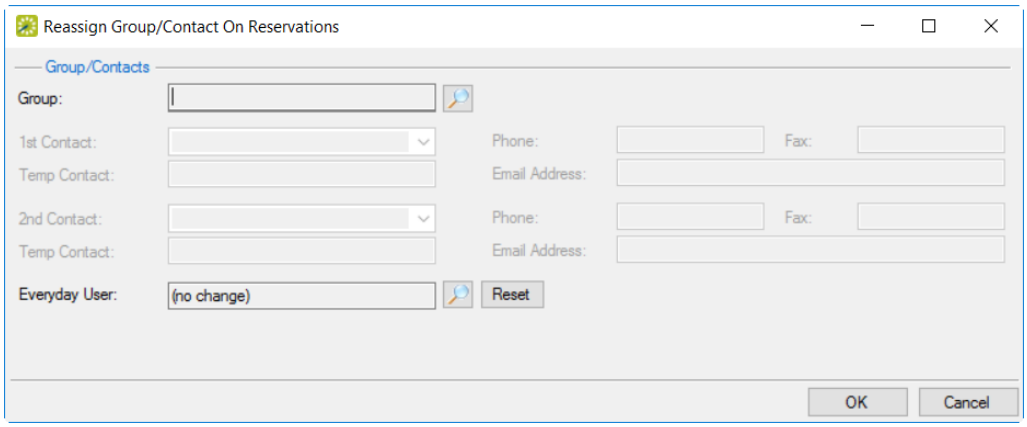
Add or Modify Reservations

1. In the left pane, select **Reservations**; all events for the group or individual show on the right pane.



Note:

Clicking **New** launches the Reservation Wizard. Selecting a reservation and clicking **Open** launches the Navigator. Clicking **Reassign** launches the dialog below, where you can assign the reservation to another Group or Individual.



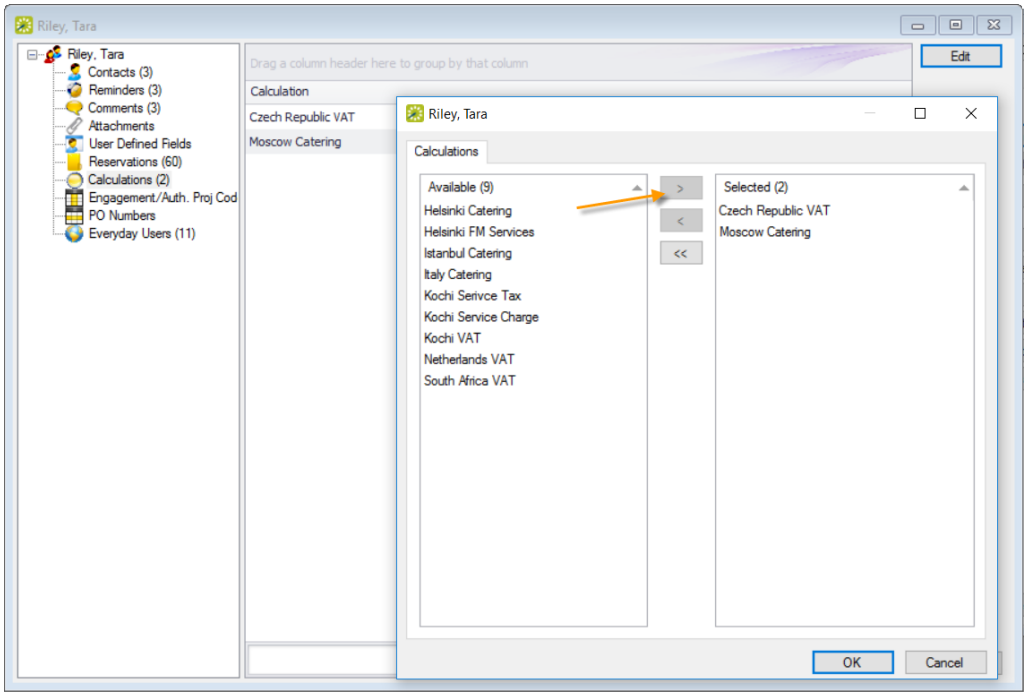
2. When finished, click **OK** to return to the group profile page.

Add or Modify 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. Assigning calculations to a Group or Individual profile means that they will be included automatically in any invoicing for this group or individual. See Also: Configure Calculations.

1. In the left pane, select **Calculations**, and then click **Edit**. The Calculations dialog box opens.
2. On the Available list, use the Move arrows to move the selected calculations to the Selected list or visa versa.



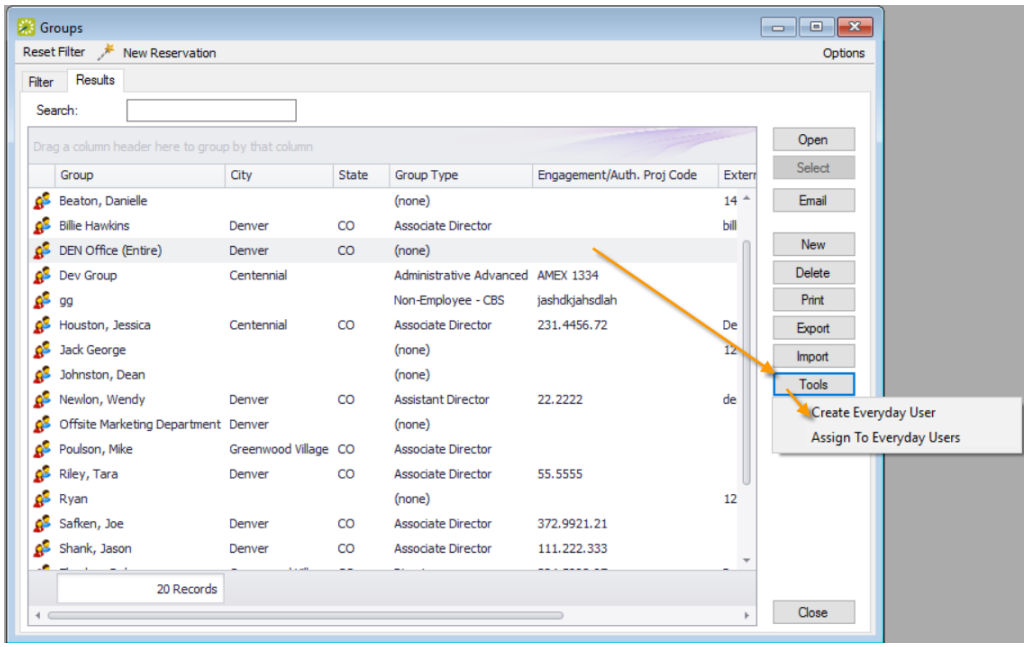
3. When finished, click **OK** to return to the group profile page.

Add or Modify Everyday Users

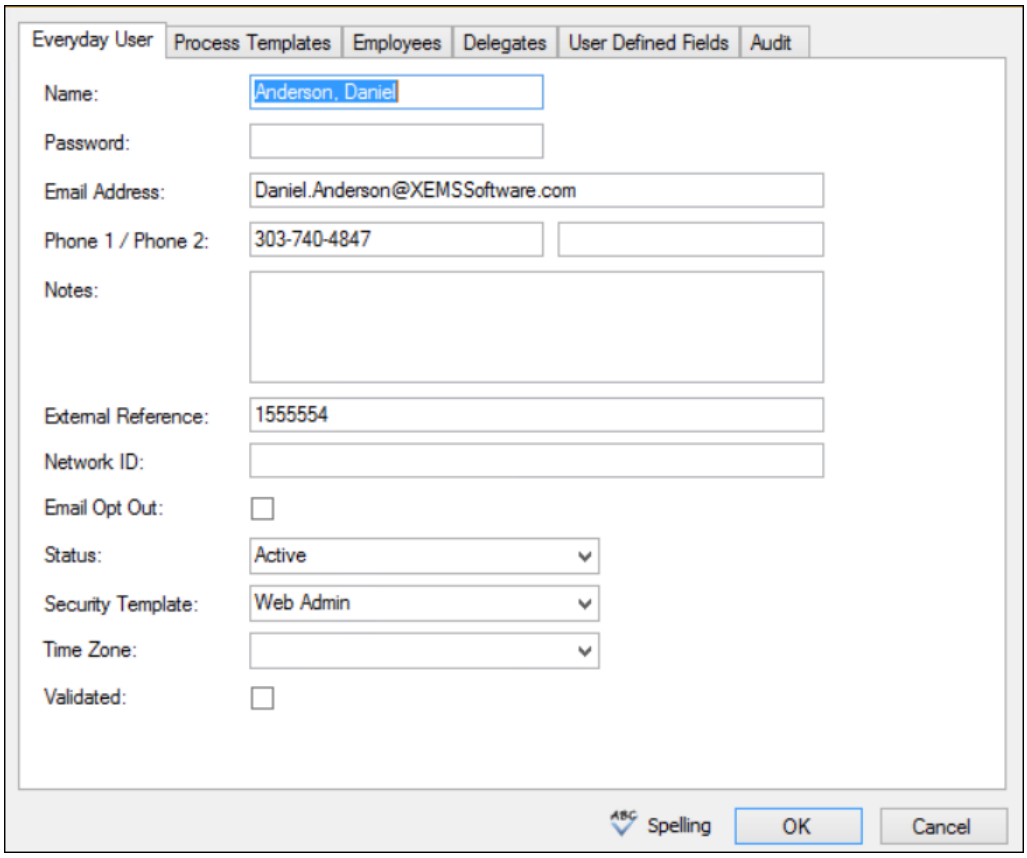
Concept: Creating an Everyday User From a Group

An everyday user is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. When you add a new group or individual in your 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 an everyday user from the group. This user can then create and view reservations on behalf of a group or groups in EMS Web App. You can create only one everyday user from a group. When you create an everyday user, you can also specify one or more delegates for the everyday user. A delegate is an everyday user who can create and view reservations on behalf of another everyday user.

1. On the toolbar, click the Groups icon.



2. Select the group for which you are creating the everyday user, then click **Tools** > **Create Everyday User**. A dialog box opens on the **Everyday User** tab.



3. Enter the information for the Everyday User.

> **Note:**
> Ideally, you should enter all the necessary information before saving; however, if you need to access your everyday user, on the EMS menu bar, click **Configuration** > **Web** > **Everyday Users**.

Field	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that an everyday user must enter to log in to EMS Web App.
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 EMS Web App.)
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 everyday user to a group and/or HR Toolkit.
Network ID	Optional field. The everyday user's network ID.
Email Opt Out	Select this option if the everyday user is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the everyday user: • Active—The everyday user can log in to EMS Web App. • Inactive—The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. • Pending—The everyday user cannot log in to EMS Web App and is informed that he/she must check back at a later time.

Field	Description
Security Template	Required field. This determines the everyday 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 EMS Web App.
Time Zone	Required field. Select the time zone for the user.

Note:
Ideally, you should enter all the necessary information before saving; however, if you need to access your everyday user, on the EMS menu bar, click **Configuration** > **Web** > **Everyday Users**.

4. Open the Process Templates tab and on the Available list, use the arrows to move button templates to the Selected list. An everyday user process template defines the functions that are available to each type of everyday user in EMS Web App 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 everyday user can view and make reservations in EMS Web App.
   - The group (everyday 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.

Note:
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 Anderson, Scott, but not Cooper, Anderson.

6. Open the **Delegates** tab, and on the Search by drop-down list, do one of the following to specify the delegates for the everyday user:
   - Leave the Find field blank, and then click **Display** to open a list of all currently available Everyday Users. Select a user, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.
   - On the Search By drop-down 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 Dis-

play. Select an everyday user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

Note:

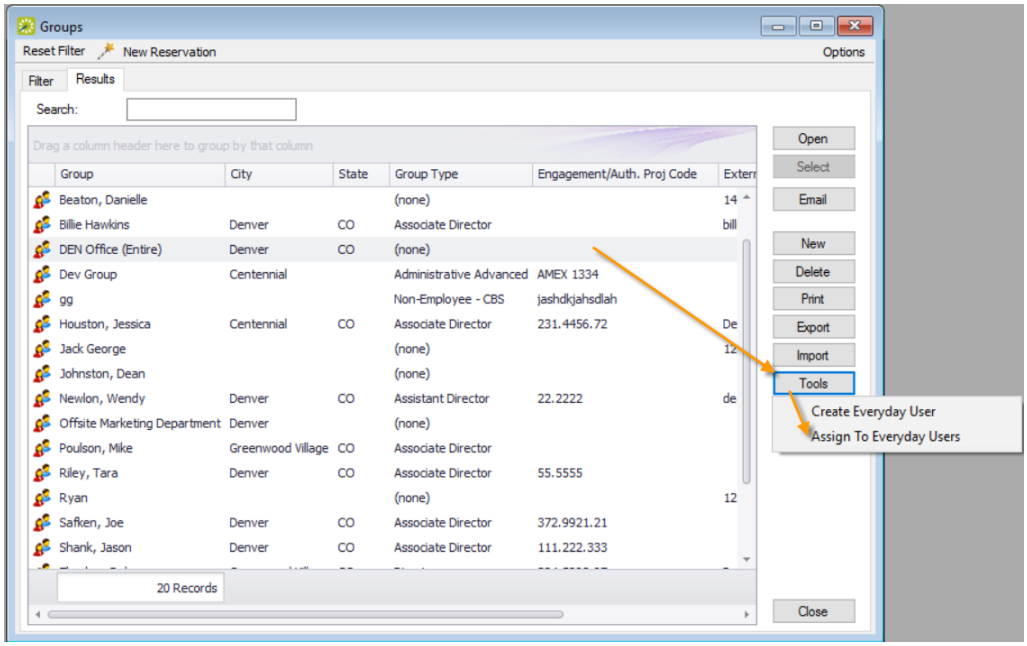
The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bob.worth@emssoftware.com but ***not*** dbobbett@emssoftware.com.

7. You can click **Spelling** to spell check any information that you manually entered for the everyday user.
8. Click **OK**. The dialog box for creating an everyday user closes and a message opens indicating that the everyday user was created successfully.
9. Click **OK** to close the message and return to the Groups window.

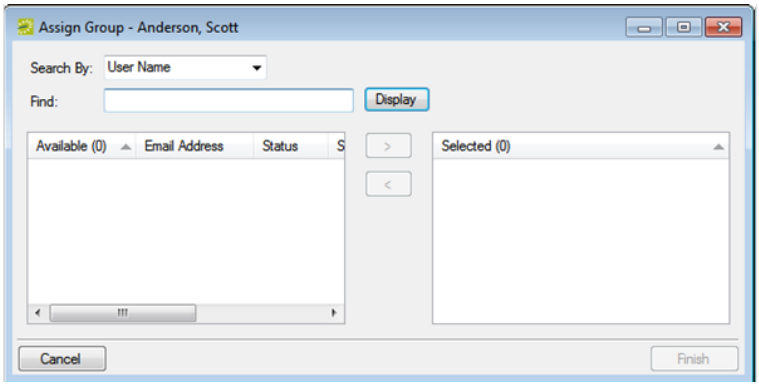
Assign a Group to an Everyday User

When you add a new group in your EMS database, you should also assign the group to an everyday user. This everyday user can then create and view reservations on behalf of the group in EMS Web App. You can assign a group to one or more Everyday Users.

1. On the toolbar, click the Groups icon.



2. Select the group you want to assign to Everyday Users, and then click **Tools** > **Assign to Everyday Users**. The Assign Group dialog box opens.



3. To assign Everyday Users to the group, find the users. Click **Display** to open a list of all currently active Everyday Users or Search By Email Address or User Name.
4. Once you have found and selected the everyday user to assign, click the Move button (>) to move the selected users to the Selected list.
5. Click **Finish**. A message opens indicating that the group was assigned successfully.
6. Click **OK** to close the message and return to the Groups window.

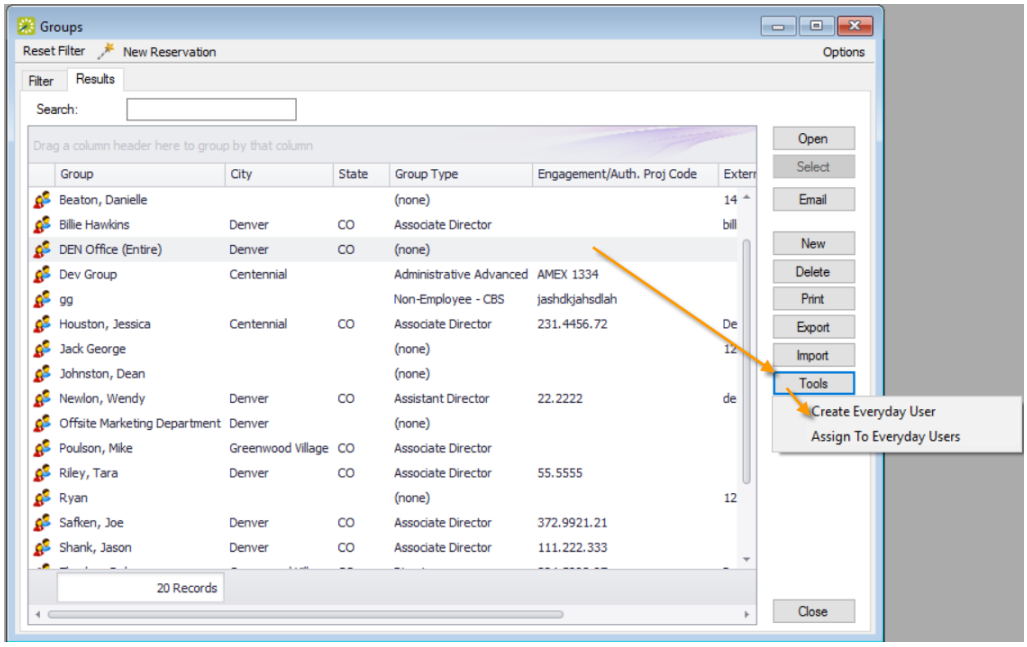
CHAPTER 239: Create an Everyday User from a Group

Concept: An everyday user is a registered user who can submit requests for reservations or schedule reservations in EMS Web App.

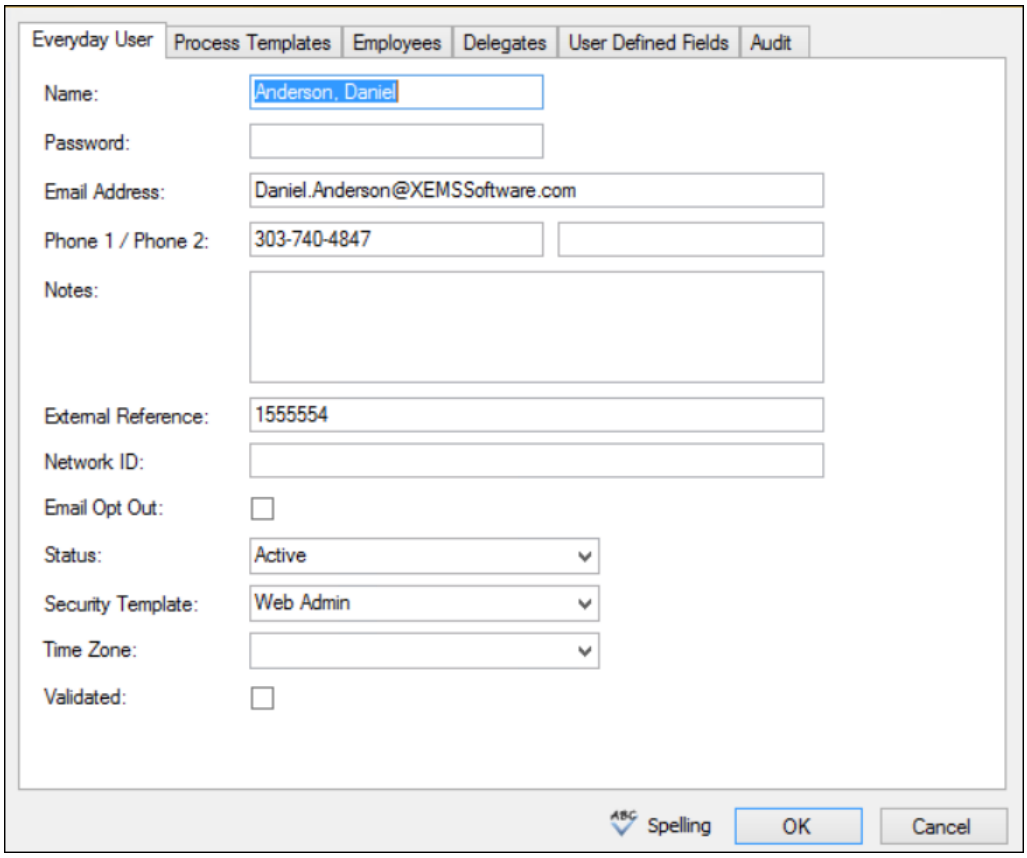
When you add a new group or individual in your database, you decide the "level" of the group that you are adding. For a group that is added at the individual (personnel/employee) level, you might also need to create an everyday user from the group. This user can then create and view reservations on behalf of a group or groups in EMS Web App. You can create only one everyday user from a group. When you create an everyday user, you can also specify one or more delegates for the everyday user. A delegate is an everyday user who can create and view reservations on behalf of another everyday user.

To create an everyday user from a group, follow these steps:

1. On the toolbar, click the Groups icon.



2. Select the group for which you are creating the everyday user, then click **Tools** > **Create Everyday User**. A dialog box opens on the **Everyday User** tab.



3. Enter the information for the everyday user.

Note:
Ideally, you should enter all the necessary information before saving; however, if you need to access your everyday user, on the EMS menu bar, click **Configuration** > **Web** > **Everyday Users**.

Field	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that an everyday user must enter to log in to EMS Web App.
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 EMS Web App.)

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 everyday user to a group and/or HR Toolkit.
Network ID	Optional field. The everyday user's network ID.
Email Opt Out	Select this option if the everyday user is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the everyday user: • **Active**—The everyday user can log in to EMS Web App. • **Inactive**—The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. • **Pending**—The everyday user cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the everyday 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 EMS Web App.
Time Zone	Required field. Select the time zone for the user.

Note:
Ideally, you should enter all the necessary information for your everyday user before you save the everyday user; however, at any time if you need to access your everyday user, on the EMS menu bar, click **Configuration** > **Web** > **Everyday Users**.

4. Open the **Process Templates** tab and on the Available list, use the arrows to move button templates to the Selected list. An everyday user process template defines the functions that are available to each type of everyday user in EMS Web App 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 everyday user can view and make reservations in EMS Web App.

- The group (everyday 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.

Note:
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 Anderson, Scott, but not Cooper, Anderson.

6. Open the **Delegates** tab, and on the Search by drop-down list, do one of the following to specify the delegates for the everyday user:
   - Leave the Find field blank, and then click **Display** to open a list of all currently available Everyday Users. Select a user, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.
   - On the Search By drop-down 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 an everyday user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

Note:
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.

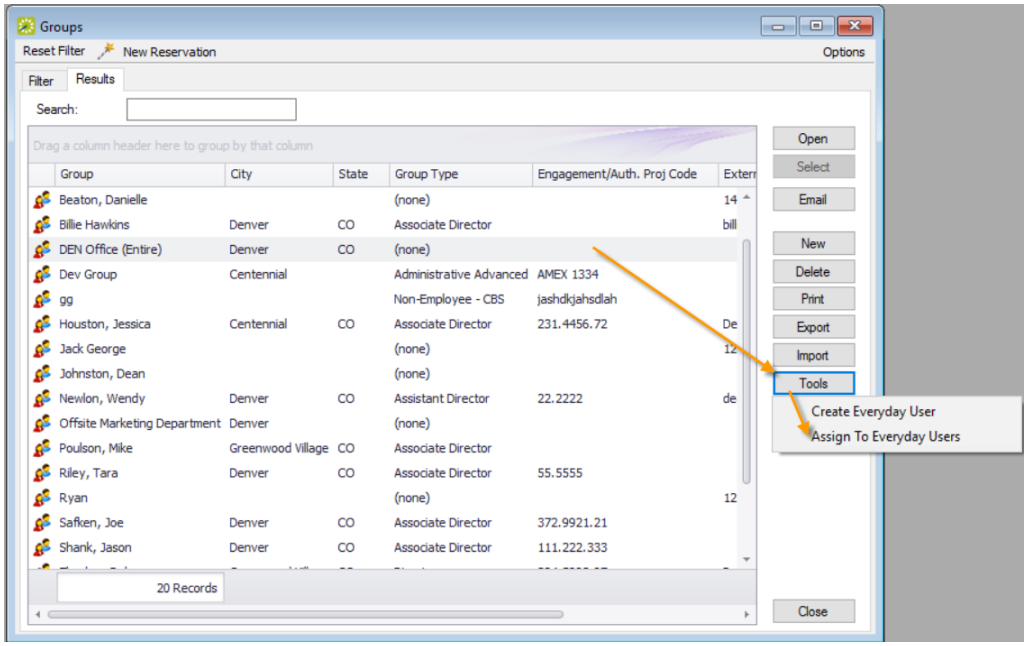
7. You can click **Spelling** to spell check any information that you manually entered for the everyday user.
8. Click **OK**. The dialog box for creating an everyday user closes and a message opens indicating that the everyday user was created successfully.
9. Click **OK** to close the message and return to the Groups window.

CHAPTER 240: Assign Everyday Users to a Group

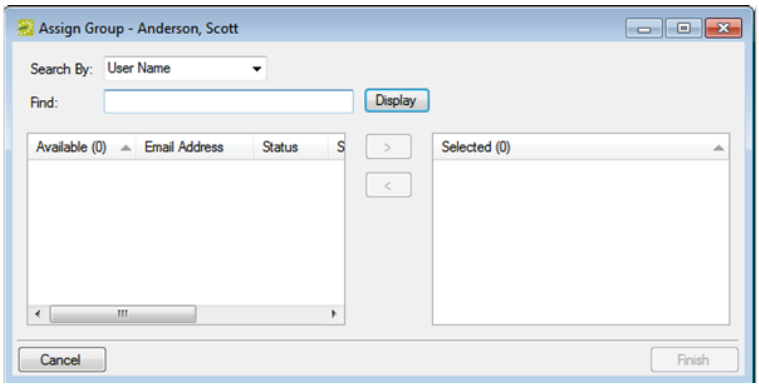
When you add a new group in your EMS database, you should also assign an everyday user to the group. This everyday user can then create and view reservations on behalf of the group in EMS Web App. You can assign a group to one or more Everyday Users.

1. On the toolbar, click the Groups icon.





2. Select the group you want to assign to Everyday Users, and then click Tools > Assign to Everyday Users. The Assign Group dialog box opens.



3. To assign Everyday Users to the group, find the users. Click Display to open a list of all currently active Everyday Users or Search By Email Address or User Name.
4. Once you have found and selected the everyday user to assign, click the Move button (>) to move the selected users to the Selected list.
5. Click Finish. A message opens indicating that the group was assigned successfully.
6. Click OK to close the message and return to the Groups window.

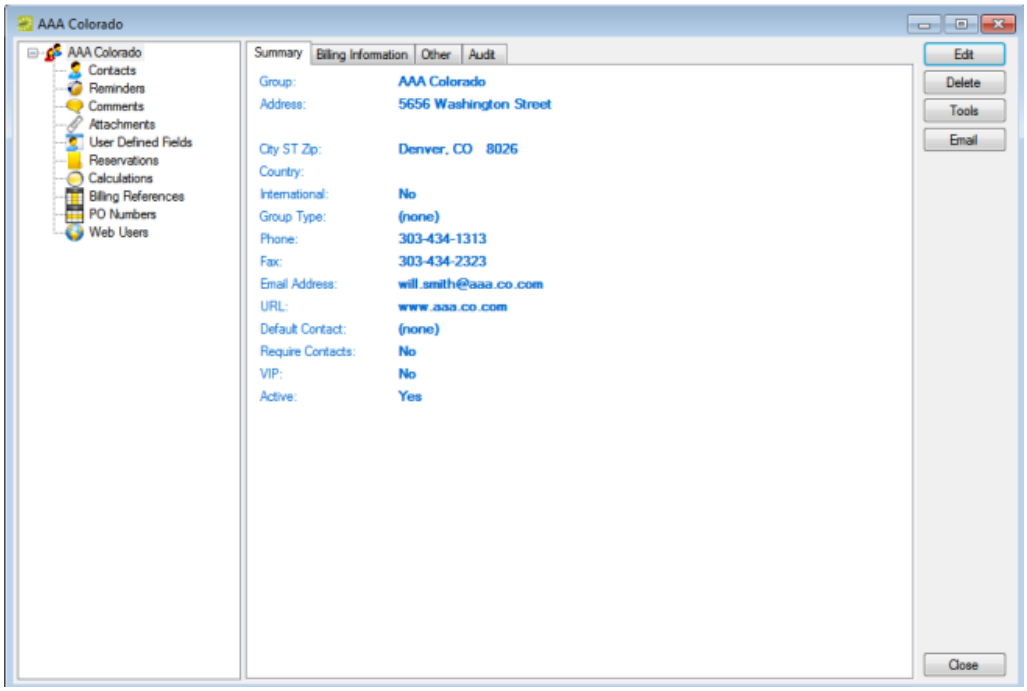
CHAPTER 241: Configure Contacts for a Group

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.

Note:
You can also configure and edit a contact "on the fly" during the reservation process. See Create a Reservation in the Reservation Wizard for details.

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.
2. Select the group, and then click Open. A group-specific window opens. The group is automatically selected in the window.



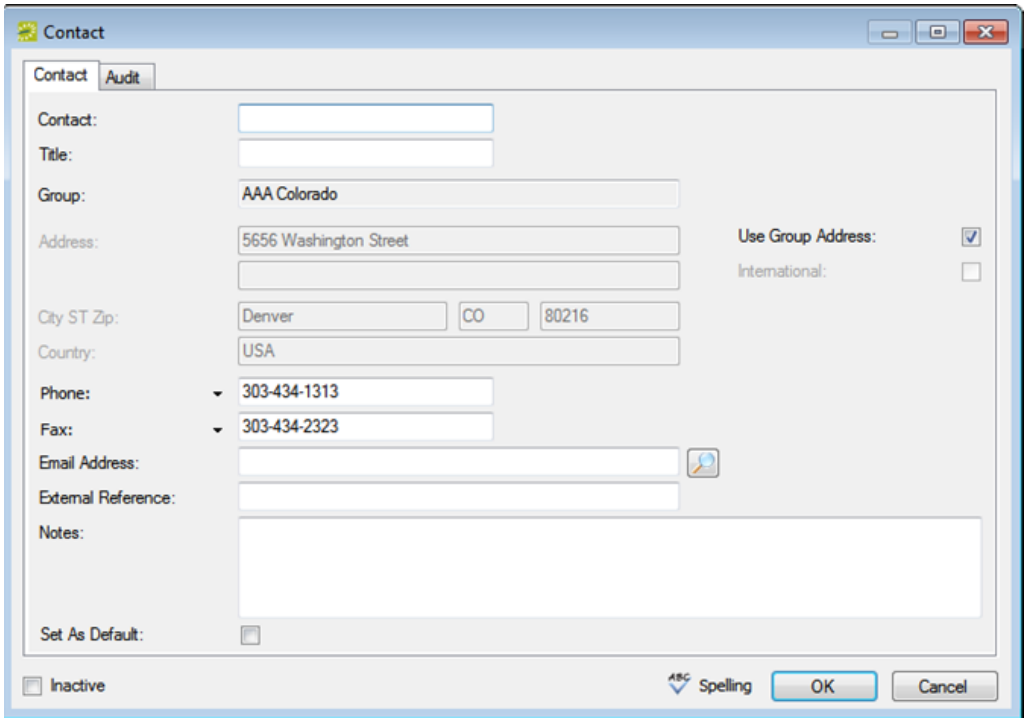
3. In the left pane of the group-specific window, select Contacts. A list of all currently active contacts for the group is displayed in the right pane of the group-specific window.

Note:
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:
   - Configure a contact manually
   - Configure a contact from a group

Configure a Contact Manually

1. Click **New**. The Contact dialog box opens.



2. Enter the information for the new contact.

Field	Description
Contact	The name of the contact.

Field	Description
	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 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 drop-down 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.

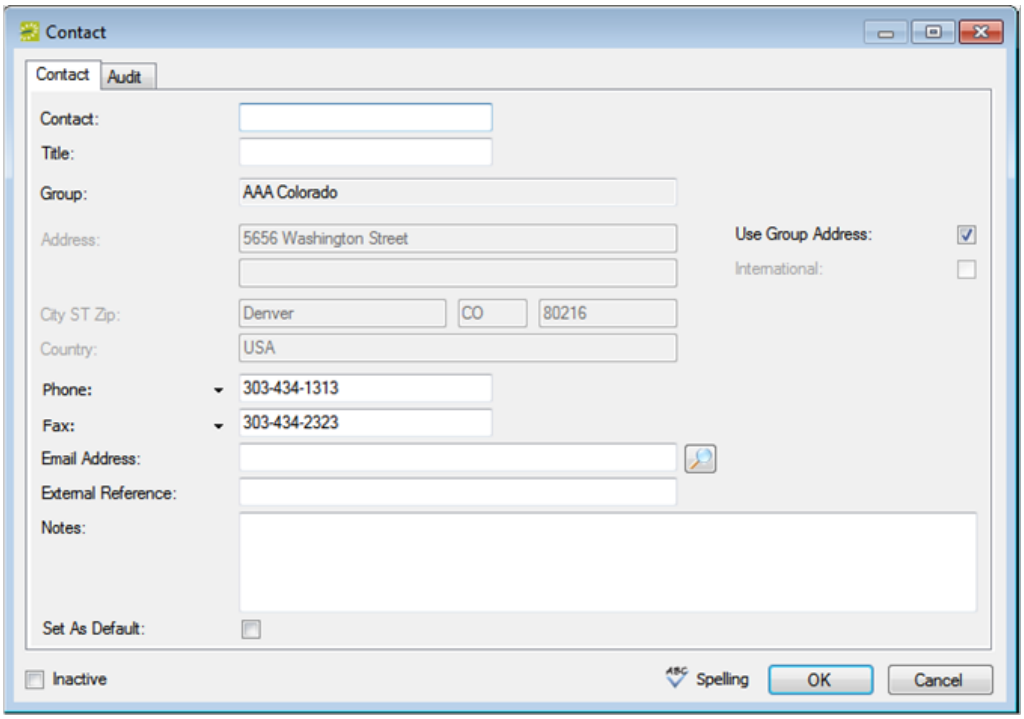
Field	Description
Set as Default	Select this option if the contact is to be the default contact for the selected group. **Note:** If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name 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 everyday user from the contact.
4. Click **OK**. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

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. 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 when you Configured Contacts.

Note:
See Search for a group and/or contacts.



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.
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	The phone number and fax number for the group.

Field	Description
Fax	**Note:** The Phone and Fax fields have a drop-down 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.
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 everyday user from the contact. See To create a everyday user from a contact.
5. Click **OK**. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

Create an Everyday User from a Contact

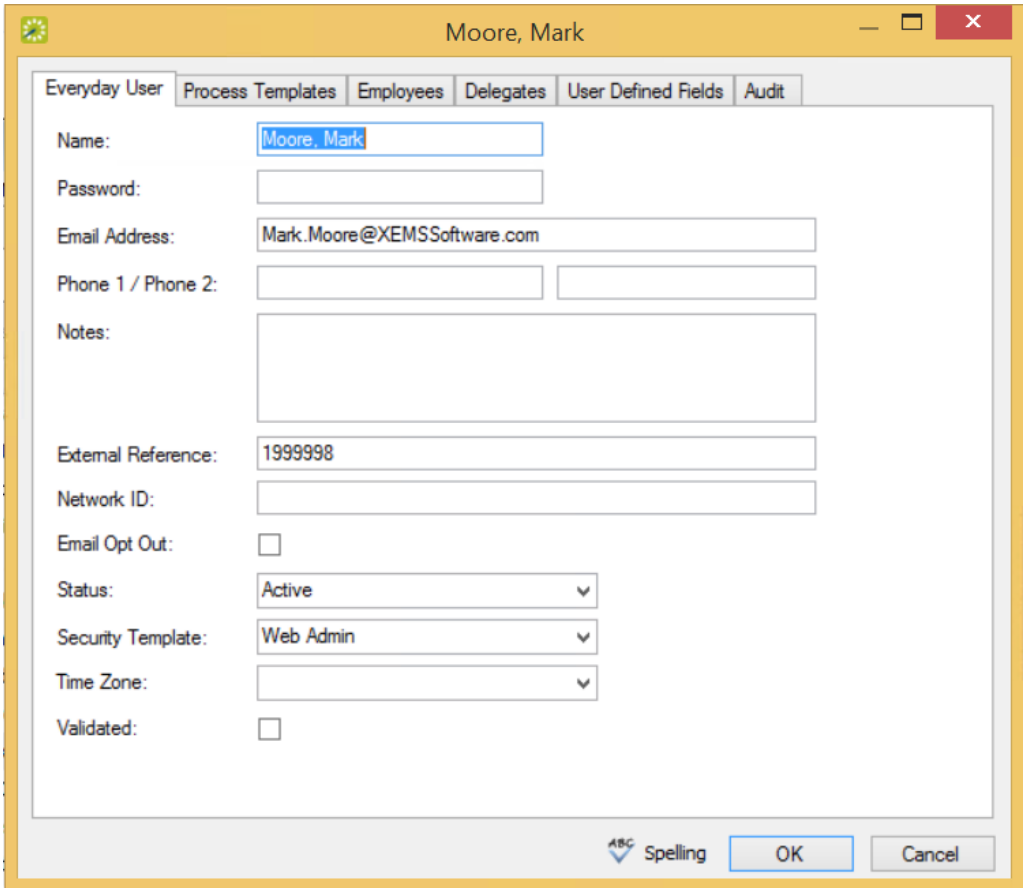
An everyday user is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. When you add a contact to a group in your EMS database, you might also need to create a user from the contact. This user can then create and view reservations on behalf of the contact's group in EMS Web App. You can create only one user from a contact. When you create a user, you can also specify one or more delegates for the user. A delegate is a user who can create and view reservations on behalf of another user.

1. If needed, open the group that contains the contact from which you are creating the everyday user in the group-specific window. See Configure Contacts.
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 everyday user.
4. Click Tools > Create Everyday User from Contact. A contact-specific dialog box opens. The everyday user tab is the active tab.



Note:

The User Defined Fields tab displays the questions that a everyday user was required to answer when the user requested to create an account through EMS Web App and it is not relevant to the procedure that is described below.



5. Enter the information for the everyday user.

Field	Description
Name	Automatically populated after you select the contact. You can edit this information.
Password	The password that a everyday user must enter to log in to EMS Web App.
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 EMS Web App.)
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	Optional field. Links the everyday user to an outside program if needed.

Field	Description
Reference	
Network ID	Optional field. The everyday user's network ID.
Email Opt Out	Select this option if the everyday user is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the everyday user: • Active—The everyday user can log in to EMS Web App. • Inactive—The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. • Pending—The everyday user cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the everyday user's access to the system's 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 EMS Web App.
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the everyday user 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.

Note:
An everyday user process template defines the functions that are available to each type of everyday user in EMS Web App 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 everyday user can view and make reservations in EMS Web App.
   - 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.

Note:
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 drop-down list, do one of the following to specify the delegates for the everyday user:
   - Leave the Find field blank, and then click Display to open a list of all currently available everyday users. Select a everyday user, or CTRL-click to select multiple everyday users, and then click the Move button (>) to move the selected everyday users to the Selected list.
   - On the Search By drop-down 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 everyday user, or CTRL-click to select multiple everyday users, and then click the Move button (>) to move the selected everyday users to the Selected list.

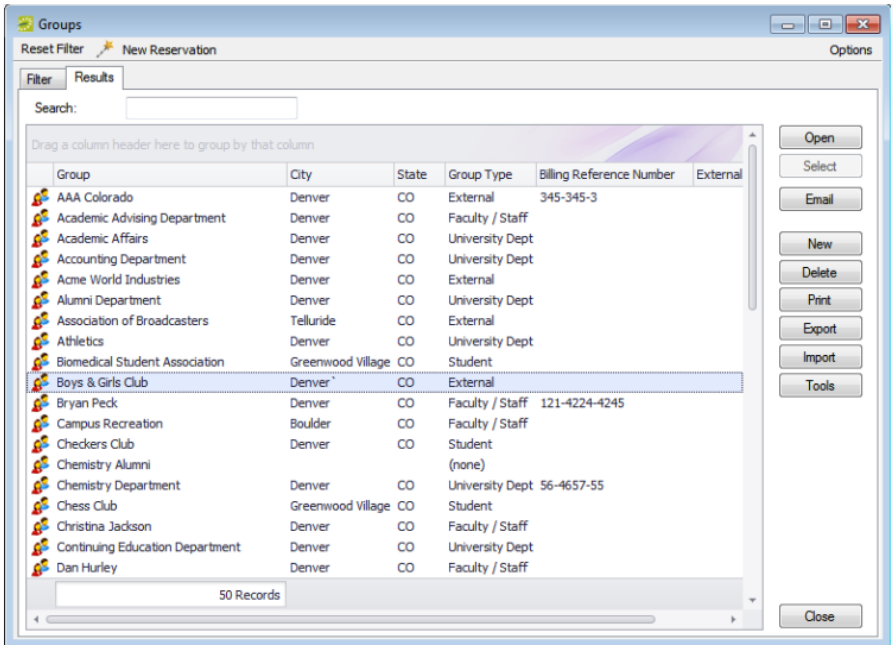
Note:
The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and the string must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bob.worth@emssoftware.com but not 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 everyday user closes and a message opens indicating that the everyday user was created successfully.
11. Click OK to close the message and return to the group-specific window.

CHAPTER 242: Import Groups

You can import groups into your EMS database from a tab-delimited text file. (See Import File Specification in the EMS Desktop Client Configuration Guide for the file specifications.)

1. On the EMS toolbar, click the Groups icon. The Groups window opens.



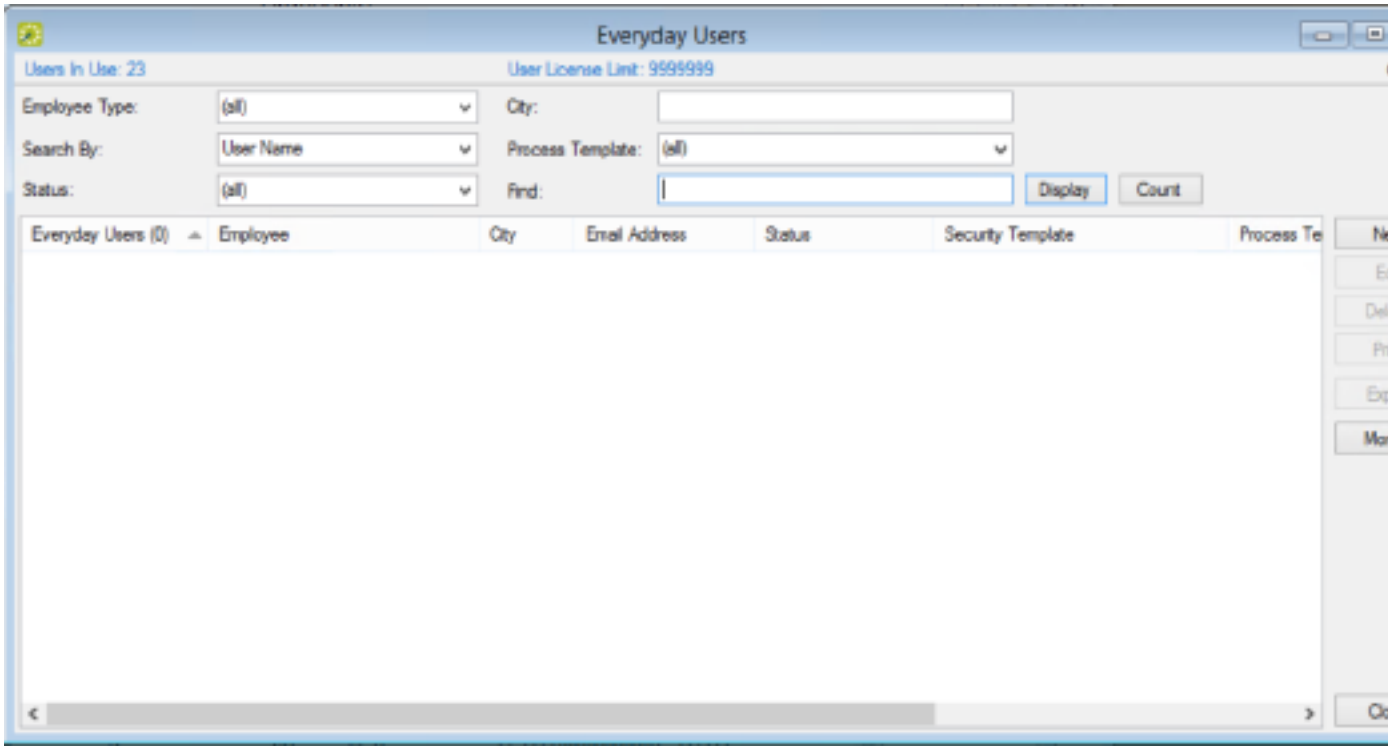
2. Click **Import**. The Open File dialog box opens.
3. Browse to and select the text file that lists the groups that you are importing. A dialog box opens, indicating the number of groups that you are about to import, and asking you if you want to continue.
4. Click **Yes**. A message opens indicating that the import was successful.
5. Click **OK** to close the message and return to the Groups window.

CHAPTER 243: Print and Export Everyday User Information

You can print a variety of information for selected everyday users and you can also export a list of selected everyday users (name and email address) to an Excel spreadsheet.

To print or export everyday user information, follow these steps:

1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Everyday Users**. The Everyday Users dialog box opens. In the upper left corner, the number of everyday users currently in use for EMS Web App is displayed. In the example below, "Group" has been relabeled "Employee."



Everyday Users Dialog Box

2. Enter any combination of the following search criteria:
   - On the Group Type drop-down list, leave the group type set to the default value of (all), or select a specific group type.
   - On the Search by drop-down list, select User Name or Email Address.
   - On the Status drop-down list, select the user status by which to search.
   - On the Process Template drop-down 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.
4. Click **Display**. The everyday users who meet your search criteria are displayed in the lower pane of the everyday users window.
5. Continue to one of the following:
   - Print everyday user information
   - Export a list of everyday users to an Excel spreadsheet

Print Everyday User Information

1. On the everyday users window, click Print. A list with a variety of options for printing information for the everyday users that are currently displayed in the everyday users window opens.
2. Select the information that you want to print for the displayed everyday users.

Option	Description
List	Opens an onscreen preview of a list of all the everyday users (user name, email address, status, security template, process template, and last login) who are currently displayed in the everyday users window. The list is sorted alphabetically by everyday user name.
Delegates	Opens an onscreen preview of a list of all the delegates (delegate name, delegate email address, delegate status, everyday user, everyday user email address, and everyday user status) for all the active everyday users who are currently configured in your EMS database. The list is sorted alphabetically by web delegate name and then by everyday user name for everyday users that have multiple delegates.
Delegates by everyday user	Opens an onscreen preview of a list of all the delegates (user name, everyday user email address, everyday user status, delegate name, delegate email address, and delegate status) for all the active everyday users who are currently configured in your EMS database. The list is sorted alphabetically by everyday user name and if a everyday user has multiple delegates, the delegate is then sorted alphabetically by delegate name.

Option	Description

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.

Export a List of Everyday Users to an Excel Spreadsheet

To export a list of everyday users to an Excel spreadsheet, click **Export** on the everyday users window.

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 everyday user that is currently displayed in the everyday users window.

By default, the file is named everyday 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.

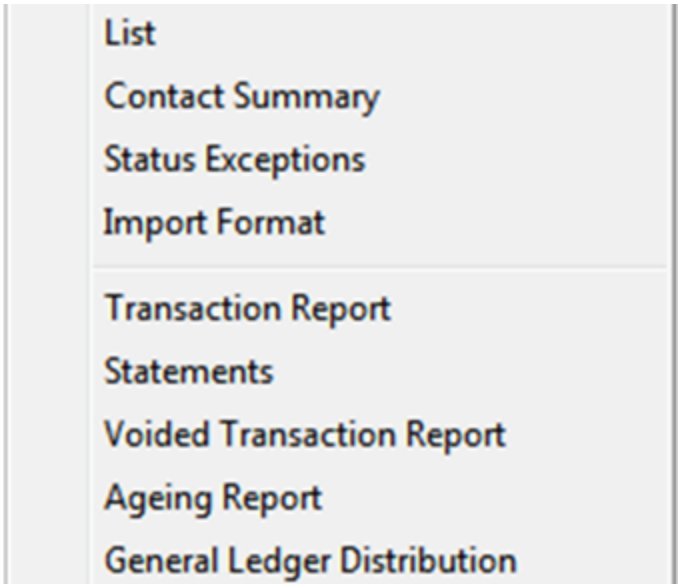
Note:
To preview the file, Microsoft Excel must be installed on your EMS client.

CHAPTER 244: Print and Export 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.

print group information

1. Search for the groups for which you are printing the information. See Search for a group and/or contact.
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.



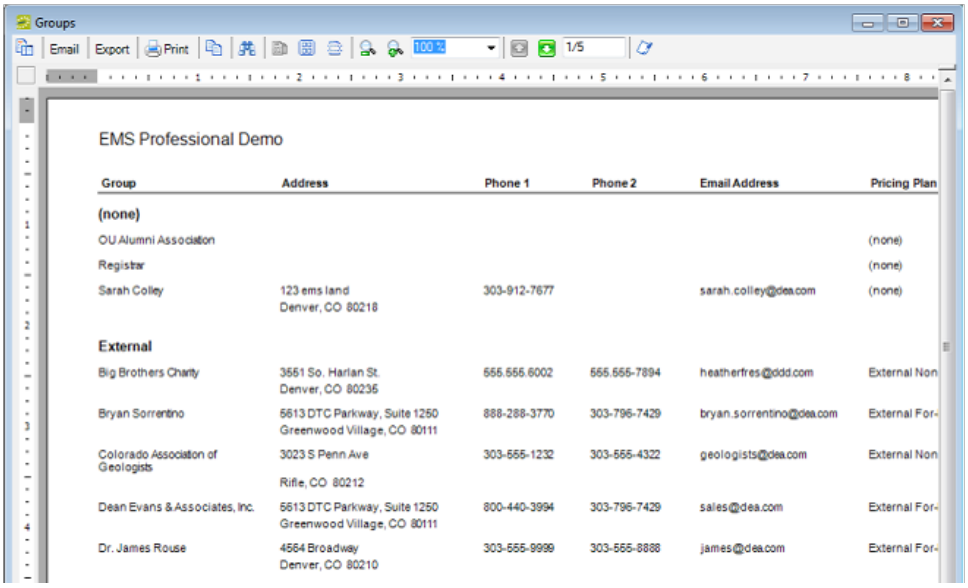
3. Select the information that you want to print for the displayed groups.

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.

Option	Description
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.

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.

Transaction Report	See Generate an EMS Billing Report.
Statements	See Generate an EMS Billing Report.
Voided Transaction Report	See Generate an EMS Billing Report.
Ageing Report	See Generate an EMS Billing Report.
General Ledger Distribution	See Generate an EMS Billing Report.



Example of an onscreen preview of printed group information

Export a List of Groups to an Excel Spreadsheet

1. Search for the groups that are you exporting to an Excel spreadsheet. See Search for a group and/or contact.
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.

Note:
To preview the file, Microsoft Excel must be installed on your EMS client.

CHAPTER 245: Work 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.

Work with Reservations for a Group

1. Open the Groups window and search for the appropriate group.
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 Create a Reservation in the Reservation Wizard.
   - Click **Open** to open the group-specific window (the group is automatically selected in the window), and then continue to one of the following:
     - Search for and view reservations by group from the group-specific window
     - Search for and make a reservation for a group from the group-specific window
     - Reassign a reservation for a group from the group-specific window

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.

   Note:
   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.

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.

> **Note:**
> Optionally, to show all reservations that have been made for the group, click **Show Old**.

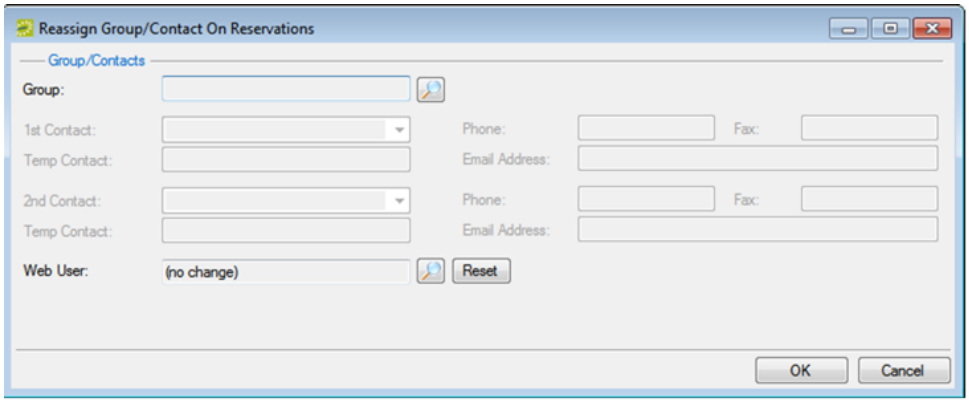
2. Click **New**. The Reservation Wizard opens.
3. Continue to Create a Reservation in the Reservation Wizard.

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.

> **Note:**
> 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.



3. On the Group drop-down 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.
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.

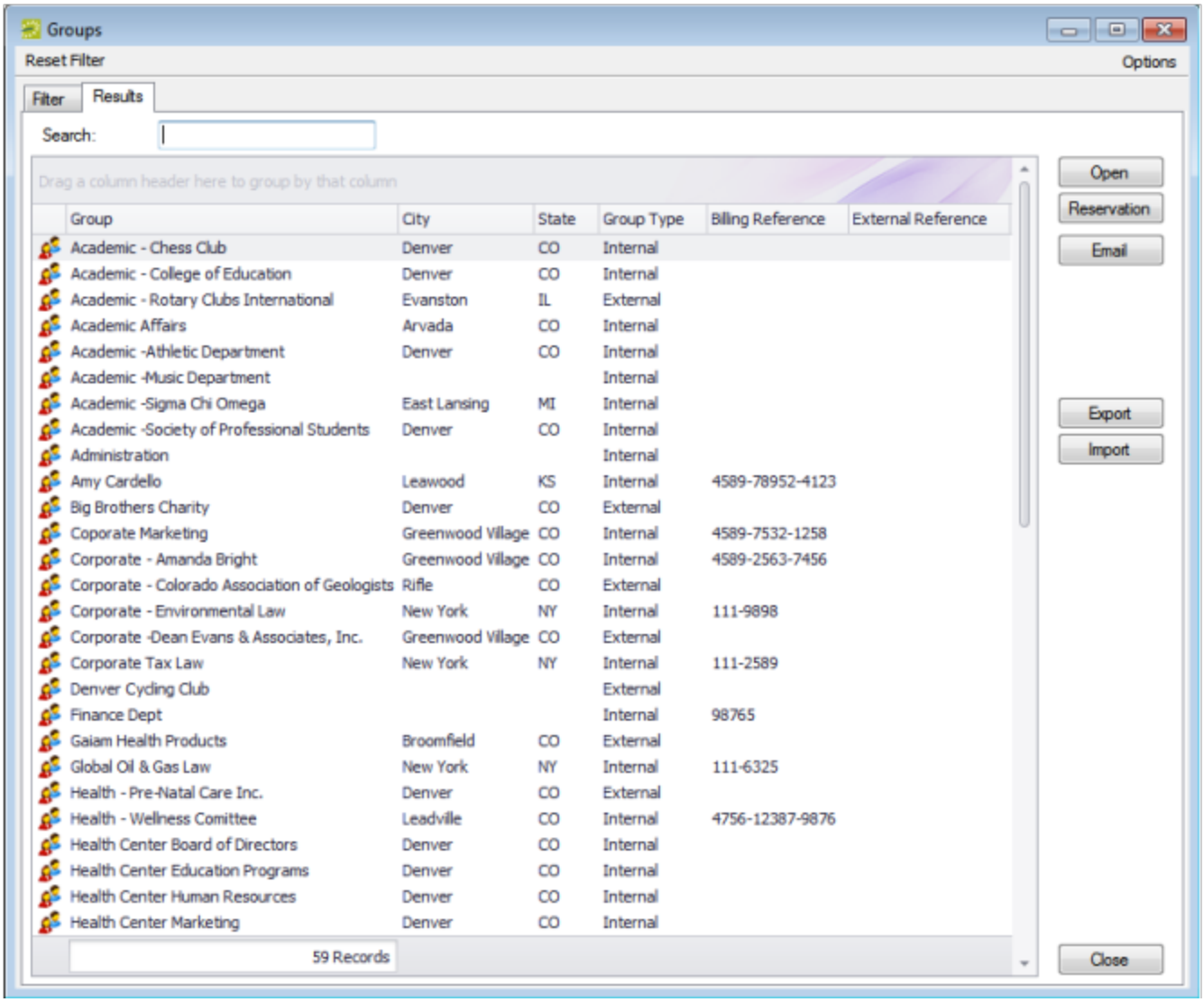
> **Note:**
> You might have to click **Reservations** in the left-pane of the group-specific window to refresh the display.

Make a Group Reservation from the Group Reservation Window (EMS Workplace Only)

1. On the EMS Workplace toolbar, click the Group Reservation icon.



The Group Reservation window opens. The **Results** tab is the active tab.

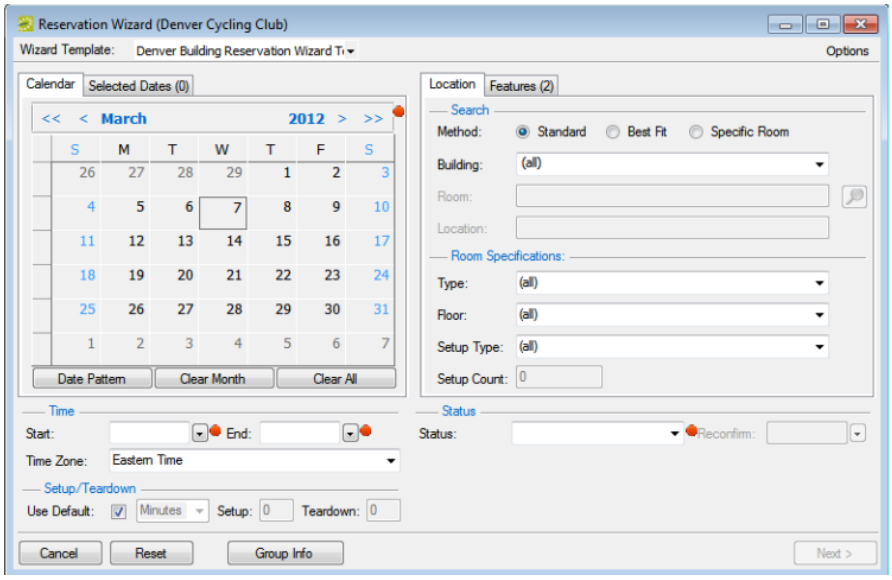


2. Open the **Filter** tab, and search for the group for which you are making a reservation. See Search for a group and/or contact.

3. Select the group for which you are making the reservation, and then click Reservation. A drop-down 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 drop-down list at the top of the Reservation Wizard. (You can always select a different template if needed.)

> **Note:**
> 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.



5. Continue making the reservation as you normally would. See Create a Reservation in the Reservation Wizard.

CHAPTER 246: Email a Group

Whether your organization uses Microsoft Outlook or SMTP, you can always email an EMS group.

> **Note:**
> 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, follow these steps:

1. Search for the group that you are emailing.
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.
   - On the Groups window, select the group, and then click Open.

   The group-specific window opens.
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.

CHAPTER 247: The 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.

The following topics provide more information about the Dashboard:

- Overview of the Dashboard
- Notifications Tab
  - Confirmations vs. Notifications—What's the Difference?
- Reminders Tab
- Everyday User Reservations Tab
- Guest Requests Tab
  - Manage Requests for Managed Space
- Wait List Tab
- Reconfirm Dates Tab
- Building Hours Exceptions Tab
- Analytics Tab
- At a Glance Tab

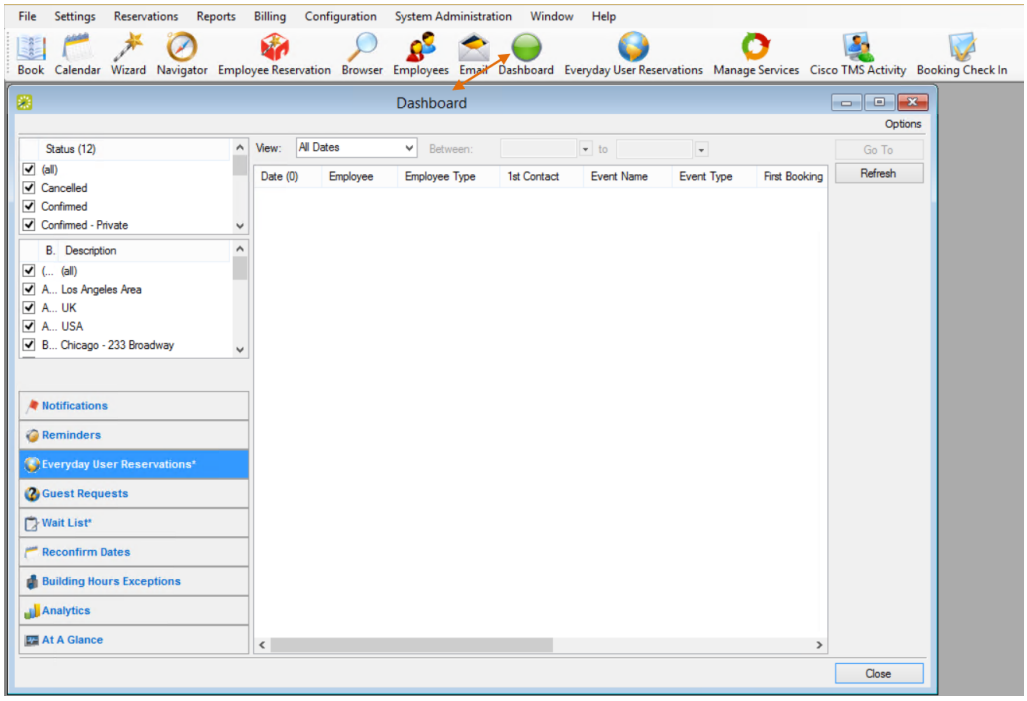
CHAPTER 248: Overview of the Dashboard

The Dashboard is often used by administrative users to supervise, review, process, and approve many types of activities in the system. When the window first opens, it has the following tabs:

- Notifications Tab
- Reminders Tab
- Everyday User Reservations Tab
- Guest Requests Tab
- Wait List Tab
- Reconfirm Dates Tab
- Building Hours Exceptions Tab
- Analytics Tab
- At A Glance Tab

You can sort columns on a tab in ascending or descending order, and you can rearrange columns by dragging the column heading, and you can change their widths.

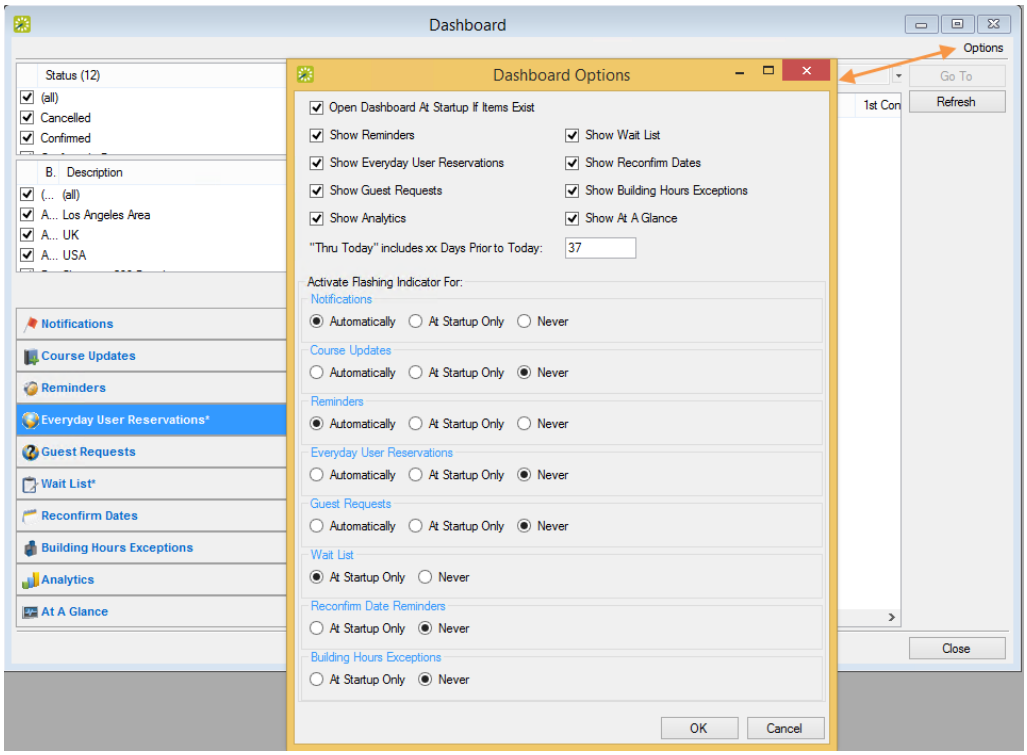
Note:
Click the Dashboard icon at any time to open the Dashboard window. See Also: Managing Requests for Managed Space.



Dashboard Window

Customize Your Dashboard Options

You can customize the appearance and behavior of your Dashboard under Options in the upper-right corner.



Dashboard Options Dialog

Dashboard Options Dialog Fields

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 Everyday User Reservations • Show Guest 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.
"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 • Everyday User Reservations • Guest 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	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

Option	Description
• Building Hours Exceptions	

CHAPTER 249: Notifications Tab

Concept: Changing Events Can Automatically Notify Users

Your Administrator can automate alerts to be sent to you (or groups of which you are a member) when changes or additions have been made in EMS for bookings and reservations, service orders, room types, setup types, user accounts, and so on. When you create a reservation or booking that has these notifications turned on, users will receive these alerts without requiring additional effort from you. Be sure to review these notification settings during the process of creating or modifying events.

Concept: Integration to Microsoft® Exchange Enables You to Use Outlook®

If your organization deploys our Integration to Microsoft® Exchange, you can view the availability of meeting rooms and attendees, and send Microsoft® Outlook meeting invitations, all from within EMS Web App.

You must be licensed for EMS Desktop Client, EMS Web App, and Integration to Microsoft® Exchange in order to configure and use this capability. If you are unsure if your organization is licensed for Integration to Microsoft® Exchange, or if you would like to learn more about it, please contact your EMS Account Executive.

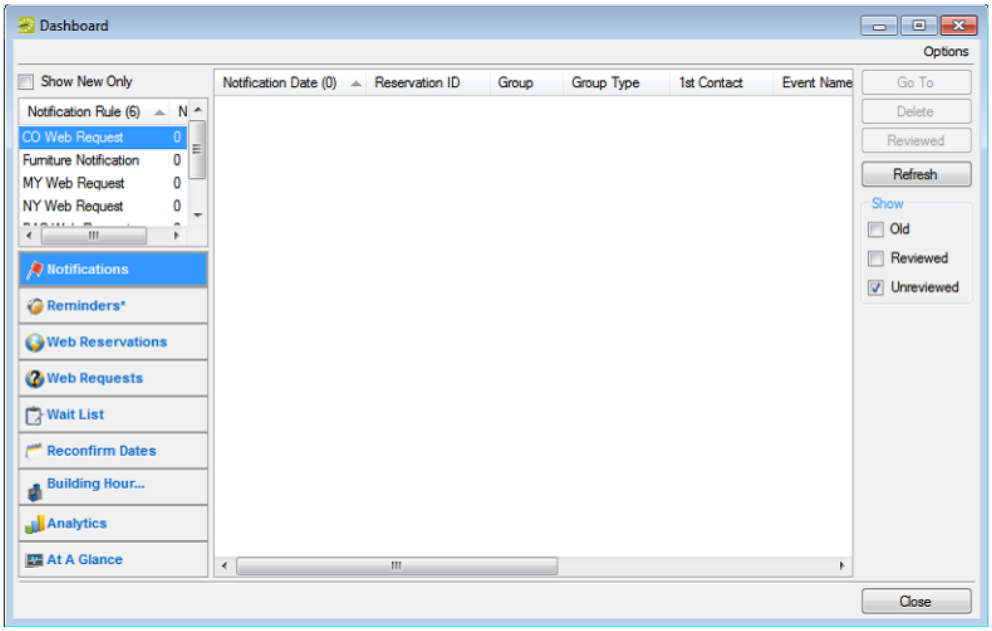


Note:

If your EMS Web App implementation uses the Integration to Microsoft Exchange, you can handle notifications using Outlook.

Notifications Tab Overview

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 **Notifications** tab is interactive. For Notification Rules, you can:

- Select a rule, and under Show, select **Unreviewed** 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.

For Notifications, you can:

- 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.

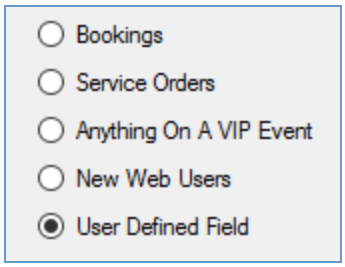
CHAPTER 250: Confirmations vs. Notifications—What's the Difference?

Confirmations

- These are either sent out automatically after a booking is made in EMS Web App, or manually from the EMS desktop client.
- They contain the date/time/resources for the booking that was created.
- These usually go to end users so they know when their event is and if they owe any money.

Notifications

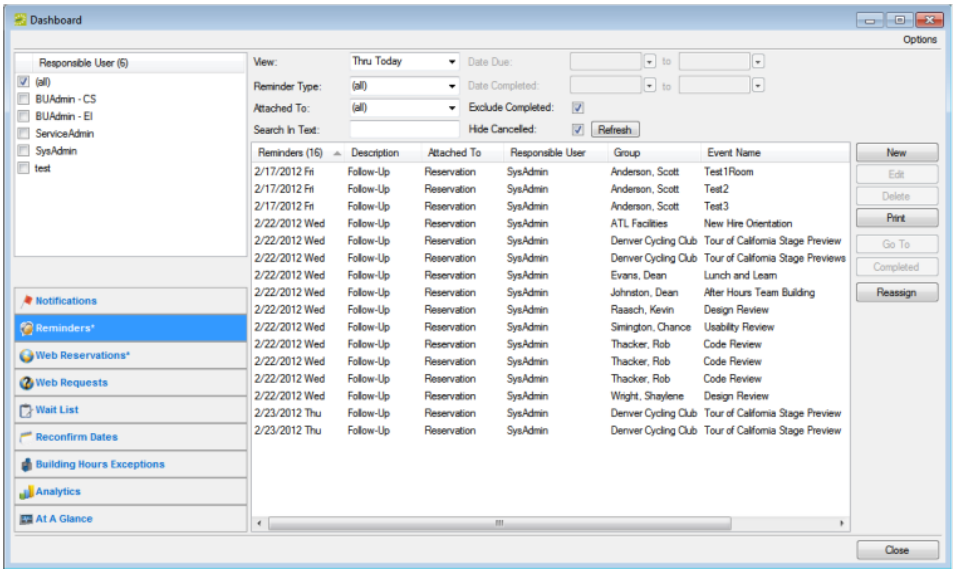
- These are sent out automatically based on the filters on the notification rule:
- There are five types of notification rules:



- These are mostly sent out X days before a booking. They are triggered when a change occurs on a booking, service order, and so forth within that range of days.

CHAPTER 251: 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.



To work with reminders, you can:

- Change the Reminders View
- Create Unattached Reminders
- Change a Reminder
- Delete a Reminder
- Print a Reminder
- View an Item to Which a Reminder is Attached
- Mark a Reminder Complete
- Reassign Multiple Reminders Between EMS Users

Change the Reminders 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.

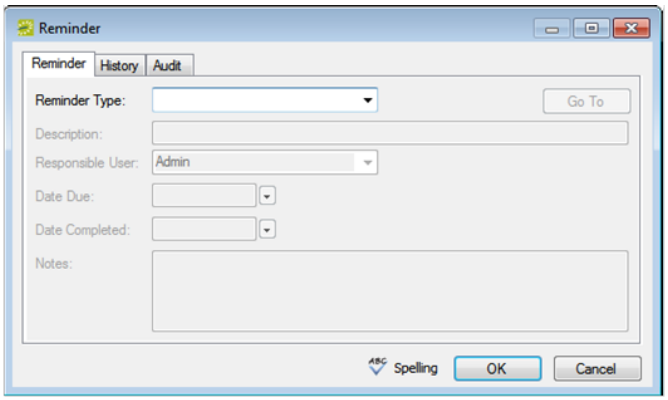
Option	Description
View	View reminders that have the indicated due date. The default value is Thru Today. If a value from the pre-configured list does not meet your needs, then select (user specified) and in the Date Due fields, enter at least a Starting due date. The Ending due date is optional.
Reminder 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.
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 “catering” or “Mary’s catering” 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 Canceled	Not selected by default. Select this option to display canceled reminders in the Reminders list.

Create Unattached Reminders

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.



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 Responsible User, 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.)
5. Optionally, 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.

Change 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. Optionally, click Spelling to spell-check the reminder before you save the edited reminder.
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.

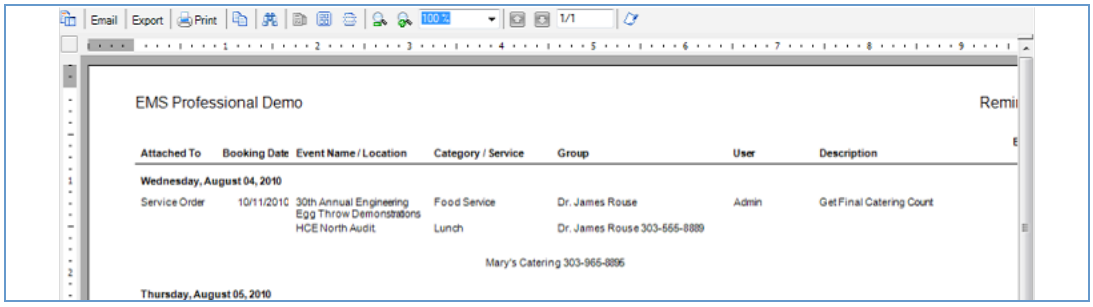
Delete a Reminder

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.

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.



Onscreen Preview for a Printed Reminder

2. Select the option or options that best fit your working needs.

View an 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

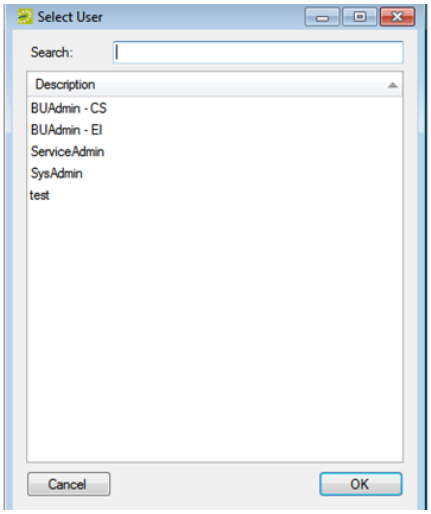
Mark a Reminder Complete

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.

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.



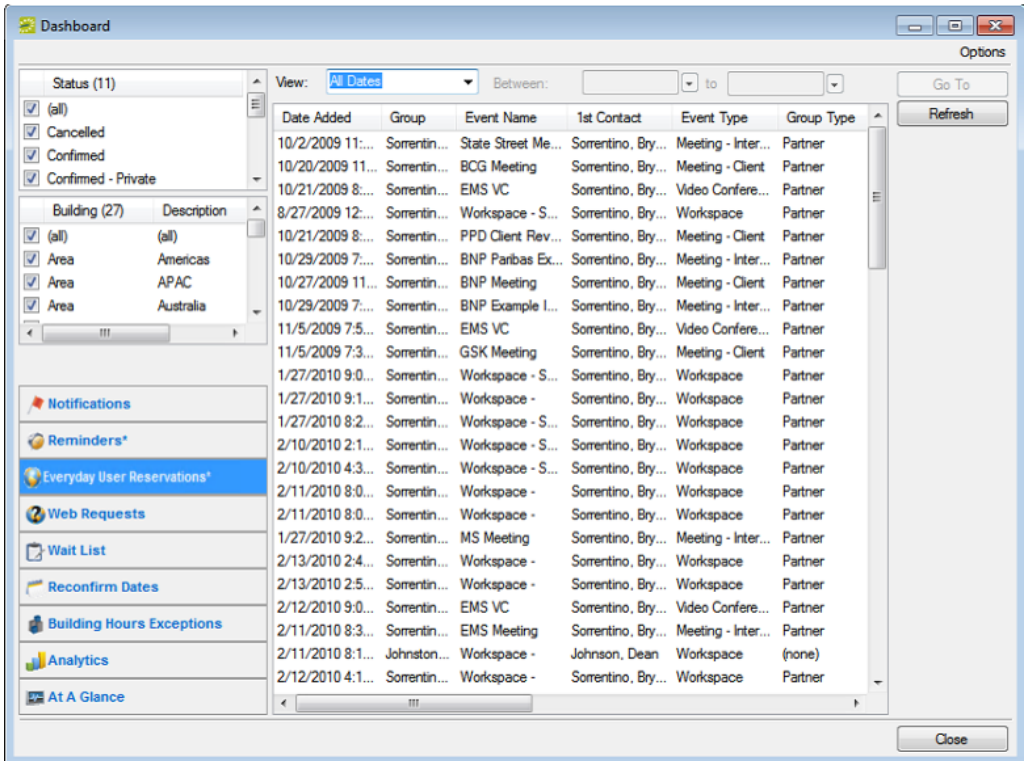
3. Select the user to whom you are reassigning the reminder.

> **Note:**
> 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 SysAdmin. 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.

CHAPTER 252: Everyday User Reservations Tab

The Everyday User Reservations tab displays any reservation that was submitted through EMS Web App made in Self Serve mode.



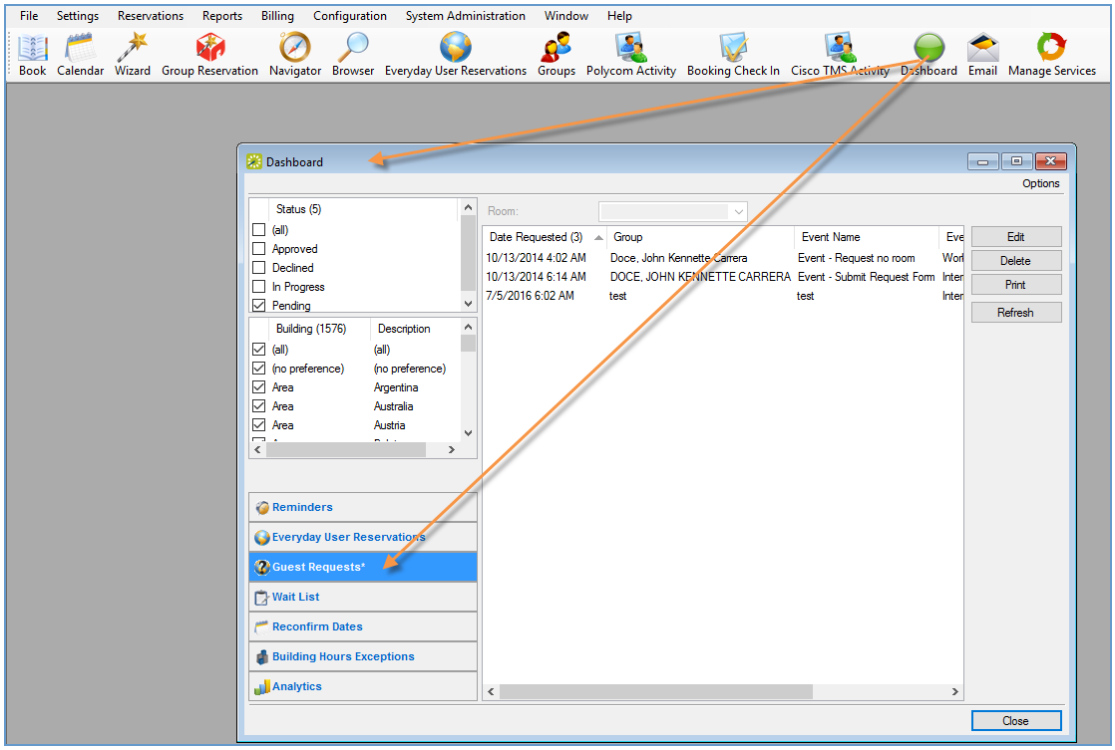
You can select options to filter the reservations list. Status and Building/Area/View filters show on the left pane of the tab. You can select one or more statuses, or you can select all statuses in a single step. You can select a specific building, area, and/or view, or you can select all buildings, areas, and views in a single step. Date filters show 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. After you select or edit the filtering options, click Refresh.

To open the reservation in the Navigator, select the reservation in the Reservations list, and then click Go To.

CHAPTER 253: Guest Requests Tab

The Guest Requests tab displays requests for space that require supervisory approval. Such requests are submitted through EMS Web App using process templates designated for "Unauthenticated Users." An unprocessed request is in Pending status.

Once your system administrator has configured facilities (rooms, categories, services, resources, and so on), he or she can configure special process templates for "managed space," which is meeting space that might require additional oversight and an approval process to finalize a reservation. For example, your organization might need specialized space like the President's Conference room, or a large banquet hall, to be treated as managed space to ensure that any request to use it is approved by a supervisor. Typically, managed space involves services, expenses, and invoicing that affect multiple stakeholders and departments, and templates designed for this model are typically assigned to Everyday Users of EMS Web App. By contrast, such templates are not available for EMS for Outlook users since Microsoft® Outlook does not show the request status of such a reservation.



The tab enables you to filter the list by status, building, room, and to work with the requests. If you filter the list by Status or Building (on the left panel), click Refresh.

CHAPTER 254: Manage Requests for Managed Space

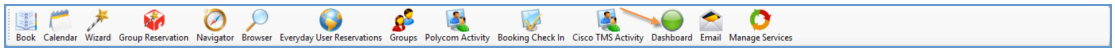
This topic guides you in approving "pending requests," which are requests for space that require supervisory approval and appear in your Dashboard.

Concept: You Use the Request/Approval Model to Oversee "Managed Space"

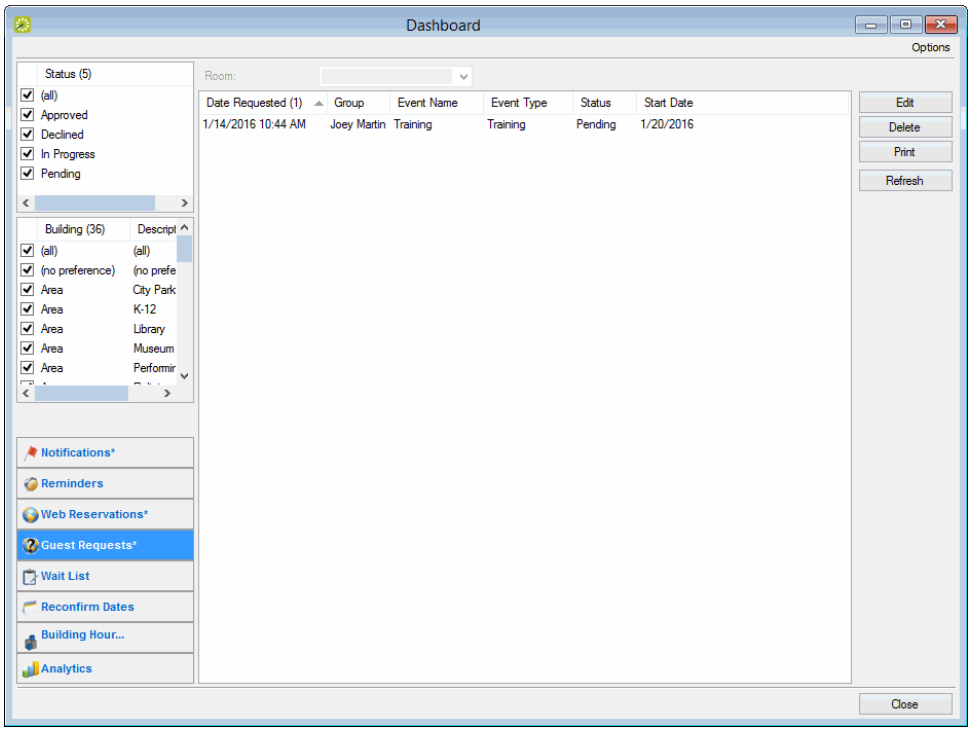
Once your system administrator has configured facilities (rooms, categories, services, resources, and so on), he or she can configure special process templates for "managed space," which is meeting space that might require additional oversight and an approval process to finalize a reservation. For example, your organization might need specialized space like the President's Conference room, or a large banquet hall, to be treated as managed space to ensure that any request to use it is approved by a supervisor. Typically, managed space involves services, expenses, and invoicing that affect multiple stakeholders and departments, and templates designed for this model are typically assigned to Everyday Users of EMS Web App. By contrast, such templates are not available for EMS for Outlook users since Microsoft® Outlook does not show the request status of such a reservation.

See Also: How Does EMS Classify Different Types of Users?

1. Click the Dashboard icon in the EMS Desktop Client toolbar.



2. Click the Guest Requests tab, which displays requests for space that require supervisory approval. Such requests are submitted through EMS Web App using process templates designated for "Unauthenticated Users." An unprocessed request is in Pending status.

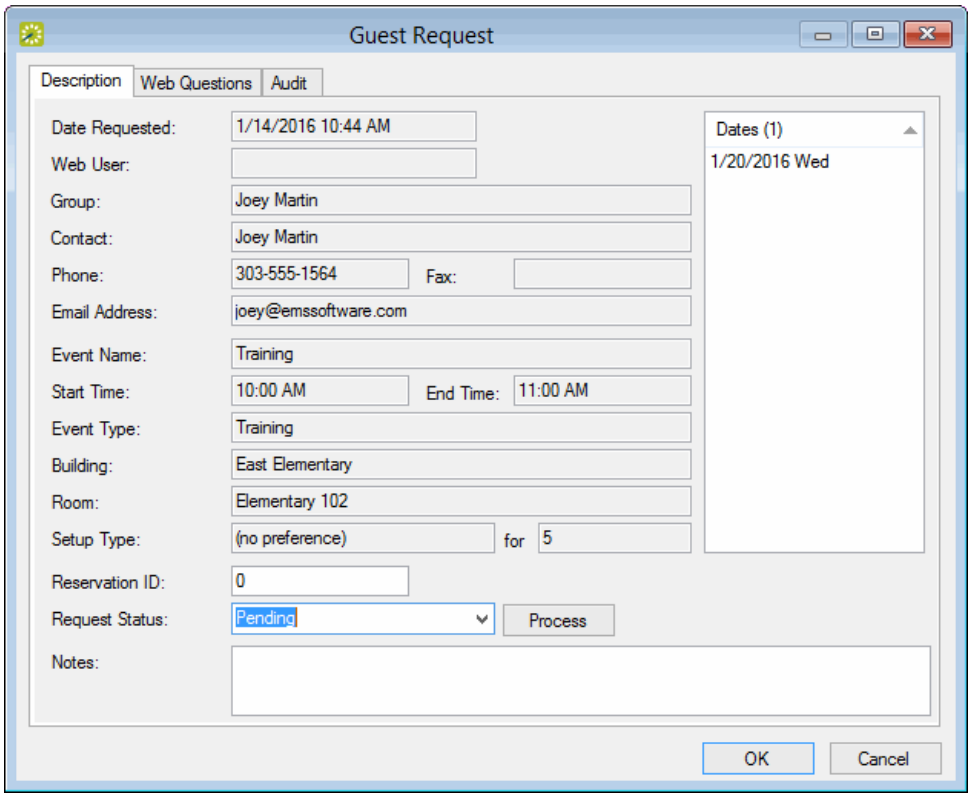


Note:

The tab enables you to filter the list by status, building, room, and to work with the requests. If you filter the list, click **Refresh**.

Approve or Work with a Pending Request

1. Select the request you want to work with, and click Edit to launch the launch the Guest Request dialog box, which shows all the information submitted for the request through EMS Web App. 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.



2. To ask the requester for further clarification before approving the request, edit the request without processing it:
   - You can ask questions and add comments about the request (for example, "Will alcohol be served at the event?") in the Notes field on the Description tab. When the user checks the request in EMS Web App, these notes will display.
   - To indicate to the guest user that you are reviewing the request, you can set the Request Status to In Progress.
   - To see the guest's answers to any predefined questions in EMS Web App, open the Web Questions tab.
   - To see service requests, click the Services tab. Double-click a category to see details on the right.
3. When you have finished interacting with the request, click **OK** to save your changes and notify the requester.
4. To process the request and create a reservation, change the Request Status field to a new status (such as Approved) and click Process on the Description tab.

   The reservation opens in the Reservation Wizard and you must finish making the reservation in the Reservation Wizard window that appears.

   - If the reservation includes services, the Process Guest Request Details window opens next. To process the services immediately, use the options on this window, or to process the

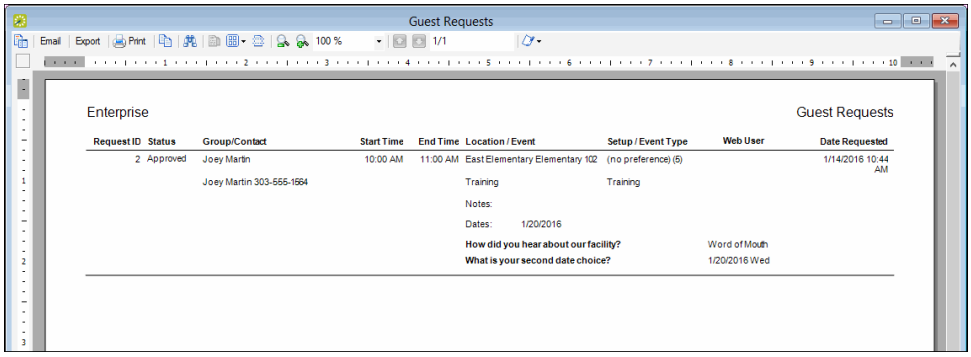
services later, click Cancel. (You can later open the reservation on the Dashboard > Guest Requests tab, and on the Services tab, click Process).

Delete a Request

1. Select the guest request, or CTRL-click to select the multiple requests, and then click Delete.
2. Click **Yes**. The message closes. The selected guest requests are deleted.

Print a Request

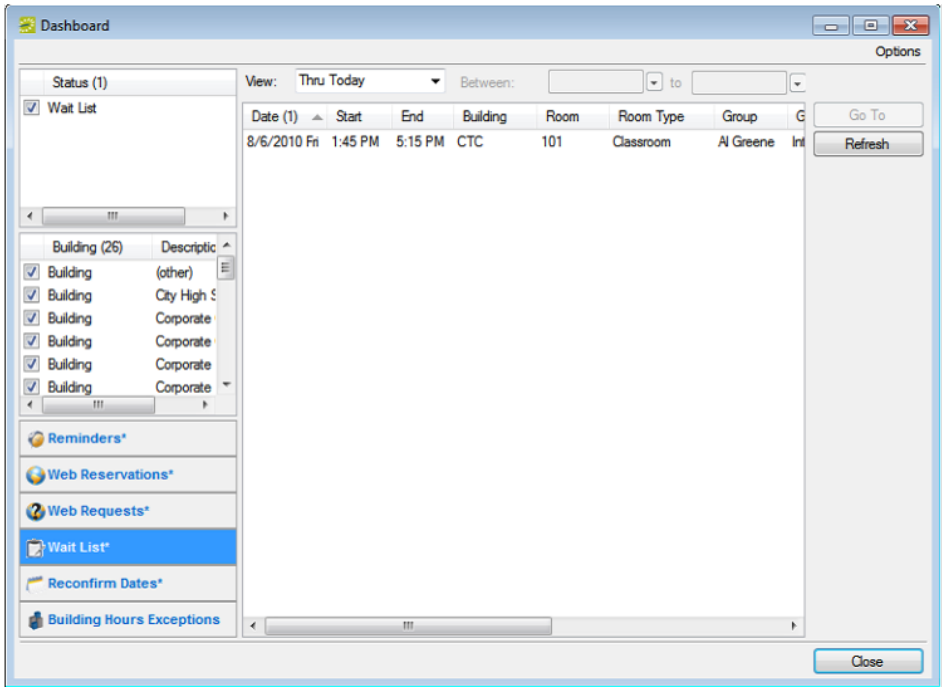
1. Select the guest request, or CTRL-click to select the multiple requests, and then click **Print**. An preview of the selected requests opens, with options to print a hard copy, export the requests to a .pdf, and email the requests.



2. Select the option or options that best fit your working needs.

CHAPTER 255: 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.

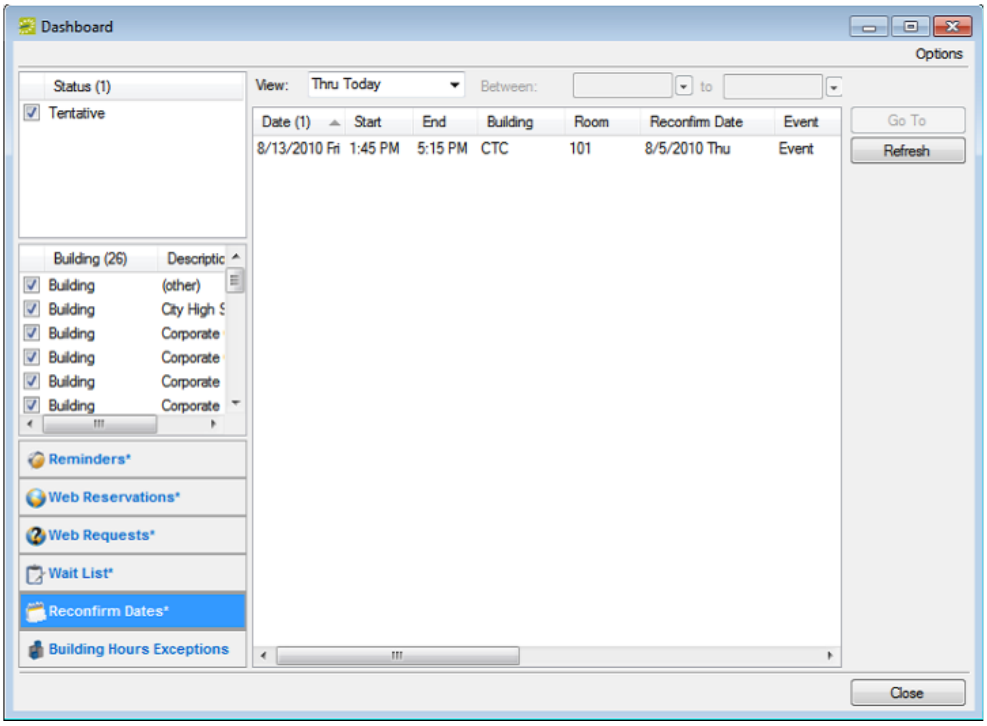


The tab is interactive. You can:

- 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.

CHAPTER 256: 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.

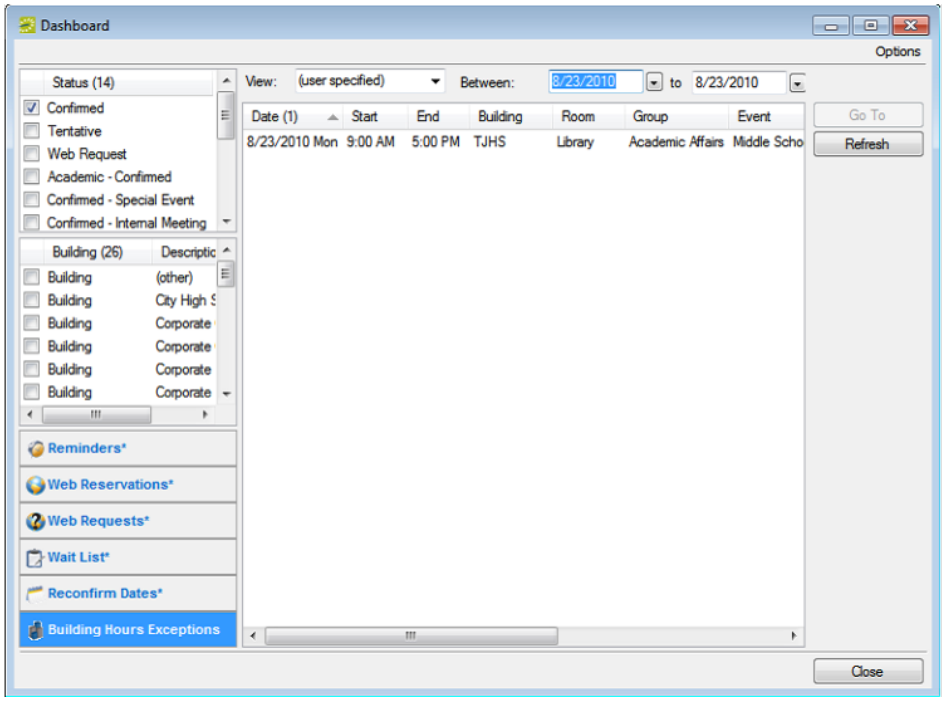


The tab is interactive. You can:

- 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.

CHAPTER 257: Building Hours Exceptions Tab

The Building Hours Exceptions tab displays reservations that occur outside of configured building hours.

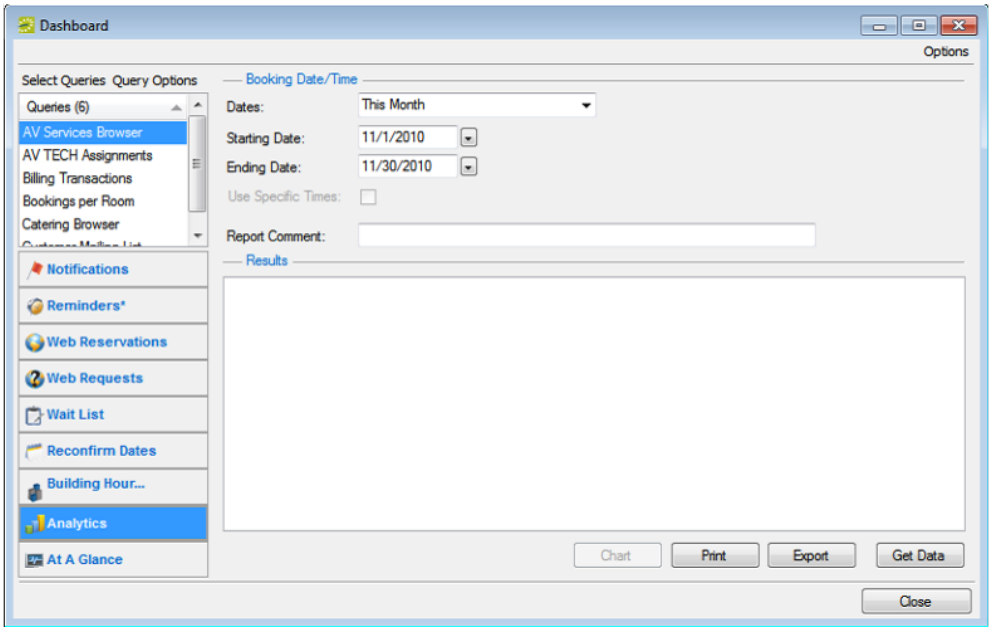


The tab is interactive. You can:

- 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.

CHAPTER 258: 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.



Run a Query from the Analytics Tab

To run a query from the Analytics tab, follow these steps:

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.

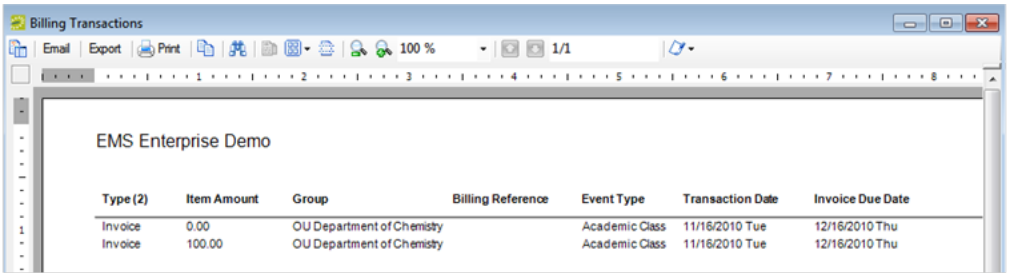
Option	Description
	Note: For some queries, if you select Custom, a Use Specific Times option becomes available. If you enter the same date for the starting date and ending date, you can select Use Specific Times, and then enter a starting time and ending time to query the data for in specific time range 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.

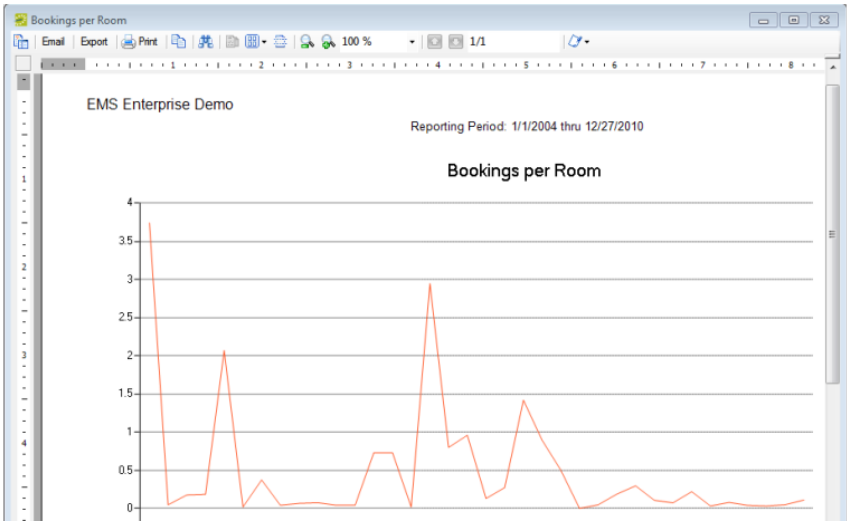
> **Note:**
> The file type for an Excel spreadsheet is .xl or .xls and you cannot change this. The file type for an XML file is .xml and you cannot change this.

- 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.



Onscreen preview of a query results

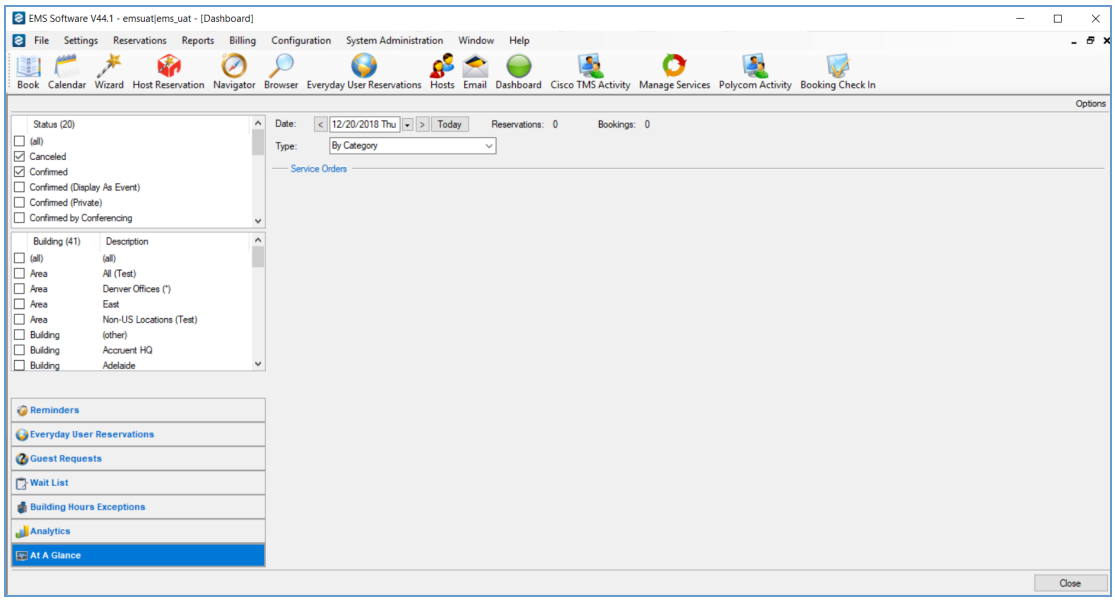
- If the query has been defined with a Chart, the Chart option is enabled. Click Chart to generate an onscreen preview of the charted data. The preview window contains options for printing a hard copy of the chart, for emailing the chart, and so on. Select the option or options that best fit your working needs.



Onscreen preview of query results that are charted/graphed

CHAPTER 259: 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.



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, complete these steps:

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.

CHAPTER 260: Manage Services

You use Manage Services 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 un-reviewed. You can also open a resource in the Navigator, and edit it if necessary.

Concept: What is a Service Order, Category, and Resource?

In EMS, you might hear these terms used interchangeably at times; however, they are different concepts.

A Category in EMS is anything you might add to a Booking such as Catering, Audio Visual, Furniture, Security, Notes, Attendee Names, Agendas etc. When you configure a Category, however, it must be of six Category types: Activities, Attendees, Catering, Notes, Resources with Service Orders, or Resources Without Service Orders. These types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it and there is nothing for a person to select from these types of services.

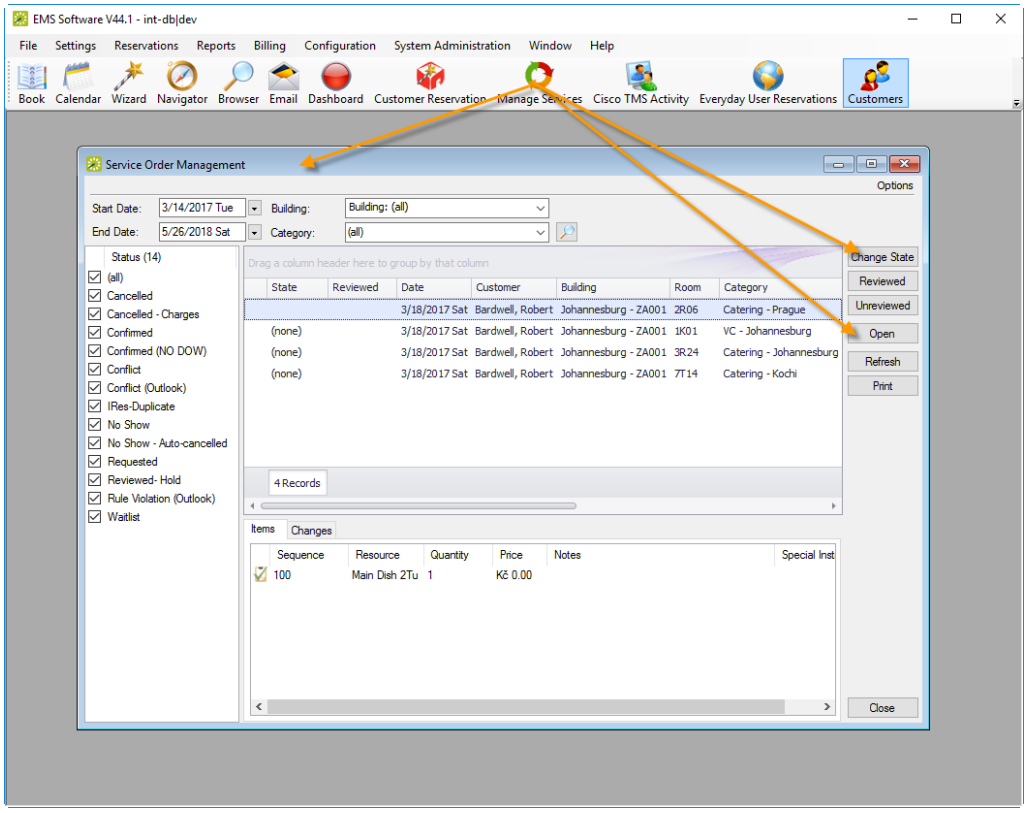
By contrast, a service category that has a type of Catering, Resource with Service Order, or a Resource without a Service Order Category, will require the Administrator to create items under it. For example, an "AV Equipment" service category (configured as a Resource without a Service Order Category type) might have items under it such as a flip chart, whiteboard, (under AV Equipment). The person requesting the service for this meeting would then select AV equipment; then flipchart and whiteboard would be typical options to add to the event.



Note:

The following Category Types allow Production Items: Catering, Resources with Service Orders, and Resources Without Service Orders.

Furthermore, a Category can be configured to "Use States" so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option in the EMS Desktop Client.



To manage service orders, you will:

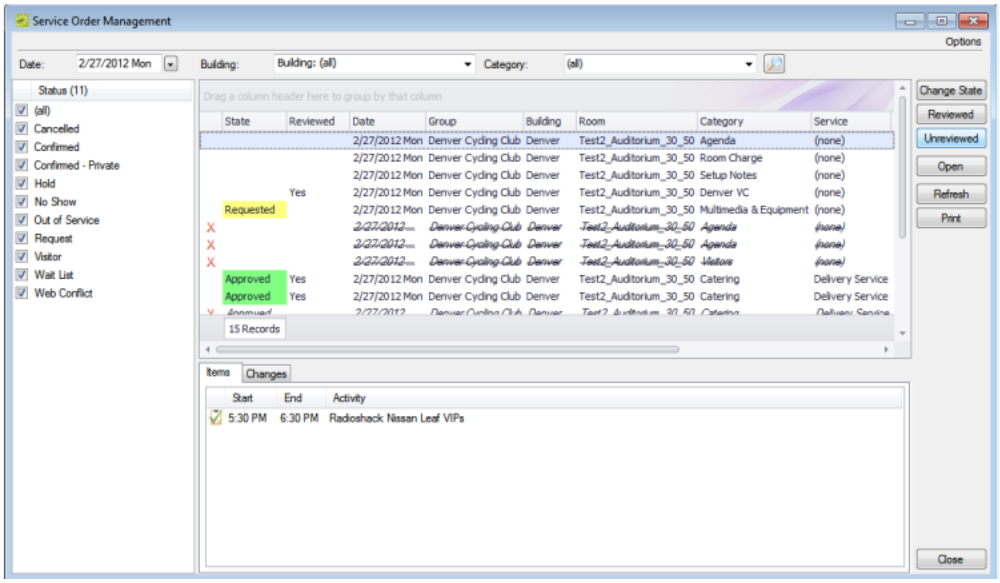
- Navigate to the Manage Services browser by clicking the **Manage Services** icon from the toolbar in EMS Desktop Client.
- Search for Service Orders.
- Review, Edit, and/or Print Service Orders.

Note:

If you are managing Catering services, watch the video tutorial, Manage Catering Services.

Search for Service Orders

1. On the toolbar, click the **Manage Services** icon. The Service Order Management window opens.

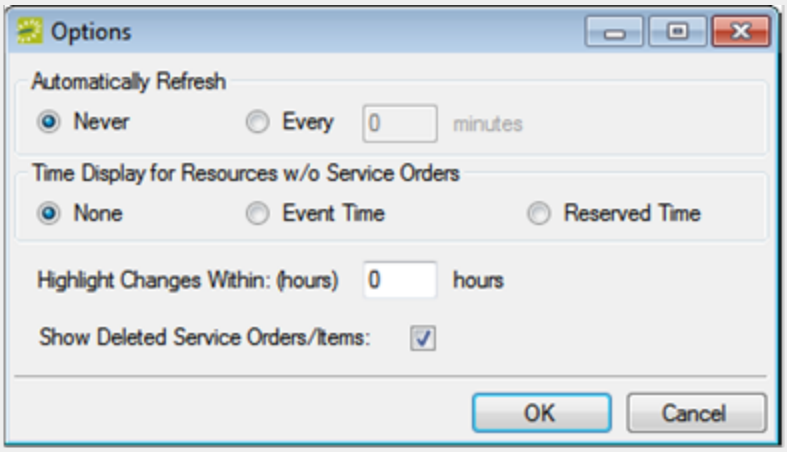


Service Order Management window

- If states are assigned to any of the resources in a booking, the name of the state and if applicable, its color, is displayed in the State column for the booking. If a service order is part of a category that has been configured to "Use States," but none has been assigned, then (none) is displayed in the State column for the booking. If your Administrator has not configured categories in your system to use states, then the State column will be blank.
- If a resource has been reviewed for a booking, "Yes" appears in the Reviewed column for the booking.
- If your Options are set to show deleted service orders/items, an "X" appears next to the booking for which the orders/items were deleted and a single line through the booking is displayed.

Note:

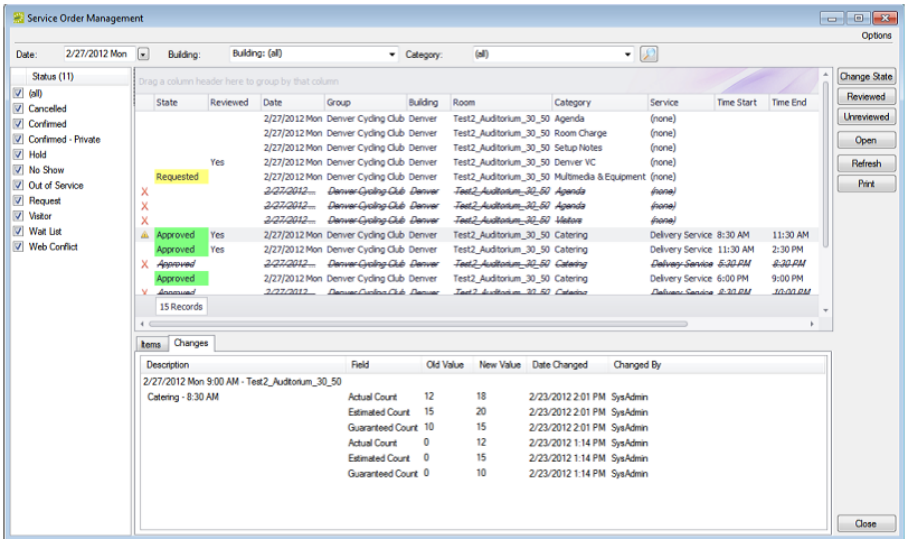
You can change how data is listed: click **Options** in the upper right corner of the Service Order Management window. The Options dialog box opens; make adjustments as needed and then click **OK** to apply these changes.



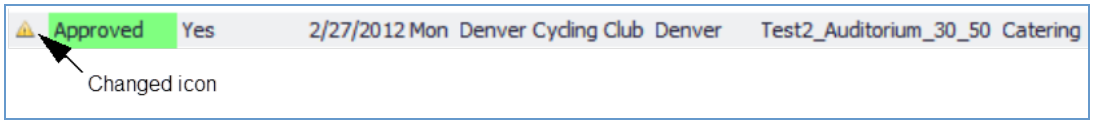
2. Use filters to search for service orders:
   - Leave the Date set to the default value (the current day's date), or select a different date.
   - On the Building drop-down list, leave the value set to the default value (all buildings), or select a specific building, area, or view.
   - On the Category drop-down list, select the category by which to search.
   - In the Status pane, select one or more specific booking statuses, or select (all) statuses.

Review and Edit Service Orders

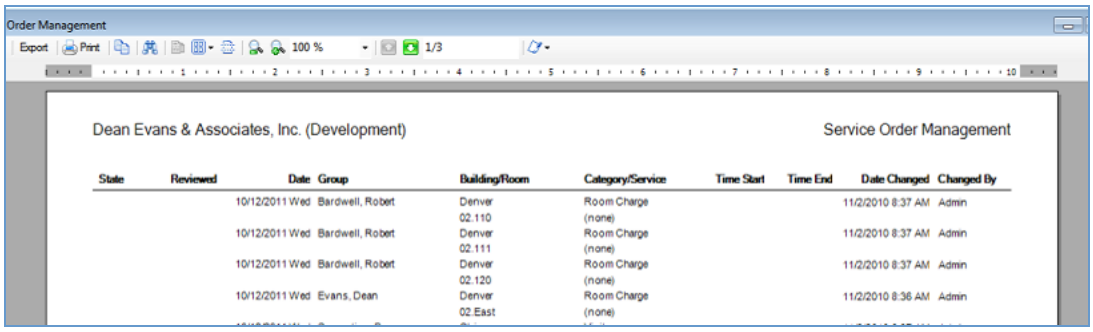
1. You can see pending service orders and details about each order, review them, change their details, change their states, and print a list of all the orders in the list:
   - To view the individual service orders for a booking, click on the booking; detailed items show below in the **Items** tab. You can view changes made to the service order, in the **Changes** tab in the lower pane of the 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.
   - To change the state of the service order, select it, or CTRL-click to select multiple



- To change details for a service order, double-click on it or select it and click **Open**; this launches the item in the Navigator. 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.



- To Review a service order, select it, or CTRL-click to select multiple orders, and then click **Reviewed** or **Unreviewed**. 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 orders of the same category, and then click **Change State**. A Change State window opens, which lists all available states for the service order. Select the new state for the resource on the State drop-down list.
- 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.



Onscreen Preview for a Printed Reminder

2. When you are finished working with Service Orders, click **Close**. Any changes that you made to the search results columns (position and width) remain in effect for any other searches that you do.

CHAPTER 261: Search for Reservations, Bookings, Resources, and Service Orders

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 Everyday Reservation tool, the Calendar, the Navigator, a Group, the Resource Calendar, and the Service Order Management browser.

Concept: What are Categories? *Click for more...*

- Booking details are also called categories.
- Booking detail items, also called resources, are the individual items (coffee, sandwich, projector, and so on) that you add to a booking detail.
- A booking detail might include a service order.

For more information about , see the following topics:

- Searching with the Browser
- Searching with the Calendar
- Searching with the Resource Calendar
- Search with the Everyday User Reservations Browser

Note:
A fast way to view and edit bookings is through the Reservation Book. See Viewing and Editing Reservations in the Reservation Book.

For information about searching with the Navigator, see the Navigator Overview topic.

CHAPTER 262: Booking Check-in

Organizations with a mobile workforce or flexible work arrangements often adopt a "workspace (hoteling or hot-desking) strategy—allotting workspace on an as-needed basis to accommodate more people in less space. EMS is a facility scheduling system for managing workspace requirements, as well as the booking of meeting/event space and resources.

Sometimes meeting hosts don't use the space they reserved. In organizations where meeting space or workspace is in high demand, or when the reservation is for a significant period of time, the lost utilization of space adds up to a lot of waste. Using this feature, you can set up each room to require that the meeting host check in to the space. When the time comes to check in, the host will receive an email with a link they can click to check in. If you have EMS Kiosk, the host can check in via the touch-screen room sign (if available), or if you have EMS Mobile App, by tapping "Check in" on the event on their mobile phone. You'll also be able to set up what happens if the host fails to check in more than 10 minutes (or whatever time you want) after the meeting starts. You might want to settle for a warning—at least for the first few months—and then automatically free up the space so that someone else can use it. The result? Better use of your space and happier users.

Booking level check in helps maintain room use levels and ensure accurate space usage reports. Check in at the booking level allows users to check into a single space booking. Additionally, this feature triggers no-show notifications in order to free up spaces that have no check ins. To enable users to check in this way, you must first enable it for each user; see Enable Booking Check In.



Note:

Older versions of EMS had "building-level check-in;" this has been replaced with booking-level check-in.

This section provides information on the following:

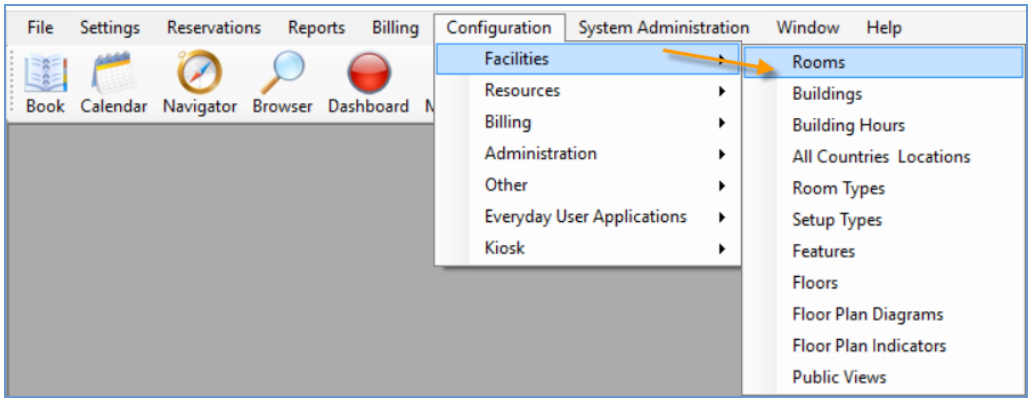
- Enabling Booking Check In
- Managing Check In
- Ways to Check In

CHAPTER 263: Enable Booking Check In

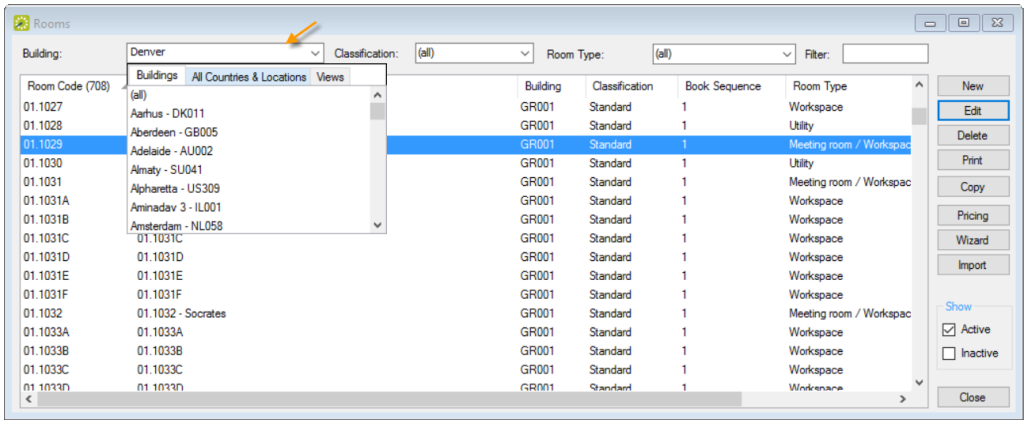
Note:

For an explanation of this feature, see Understand Booking Level Check In. To manage space that uses booking check in, see Manage Booking Level Check-In.

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



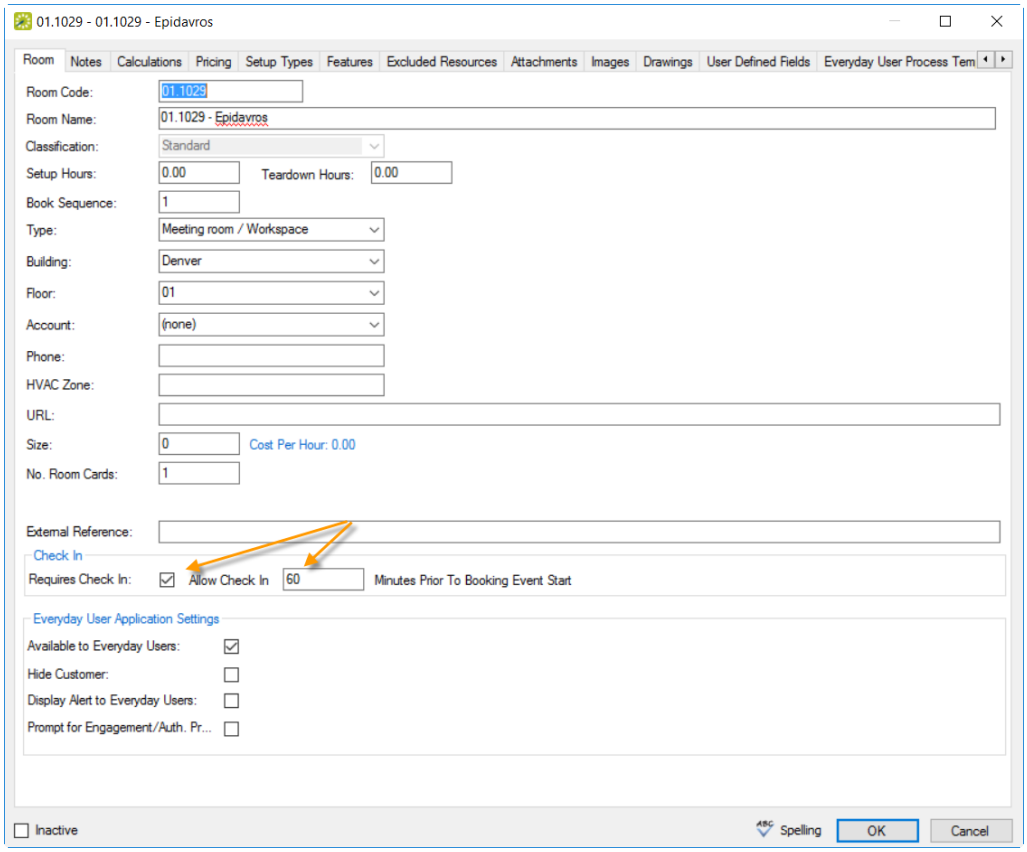
2. On the filter drop-down fields along the top, select options by which to filter the list, such as a building, area, or view.



Note:

Make sure the Inactive checkbox in the lower right corner is cleared to further narrow your list.

3. Select the room for which booking-level check in needs to be enabled and click the **Edit** button.
4. On the room configuration page that presents, check the box for **Requires 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.



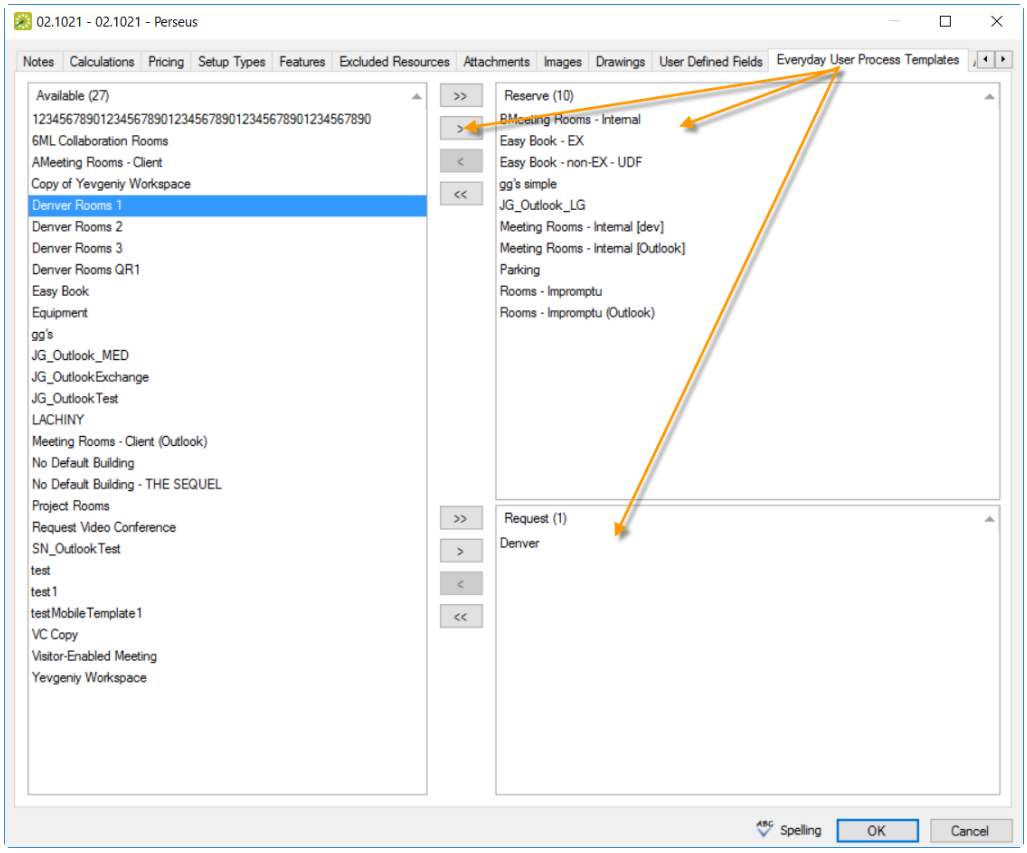
Note:

This type of check-in can be done to multiple rooms at the same time using the Wizard on the Rooms screen.

Anyone with access to the desktop client can check into a booking earlier than the time assigned to the room.

Additionally, to allow Everyday Users (such as for EMS Web App, EMS for Outlook, EMS Kiosk, and EMS Mobile App) to select this room during the booking process, select Available to Everyday Users in the Everyday User Application Settings section.

5. Finish configuring the room using the tabs along the top.
6. To enable Everyday Users to select the room when using an Everyday User Process Template, open this tab and move the room to the Reserve and Request panels as needed.



7. Click **OK** to save.

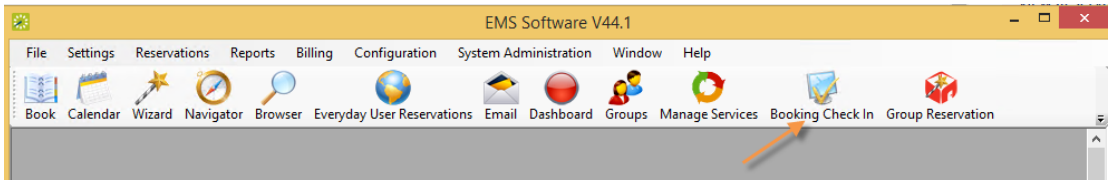
CHAPTER 264: Ways to Check In

You can check into bookings in the following ways:

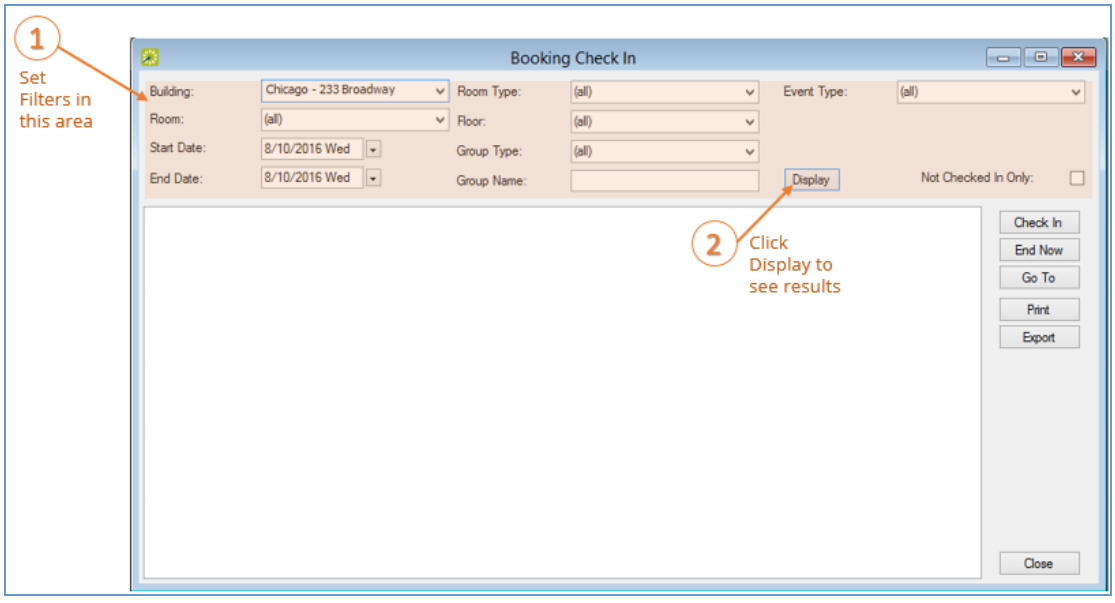
- Check in from the Booking Check In Dashboard
- Check in from the Reservation Book
- Check in from EMS Web App
- Check in with EMS Mobile App
- Check in with EMS Room Sign App
- Check in with EMS Kiosk App

Check in from the Booking Check in Dashboard

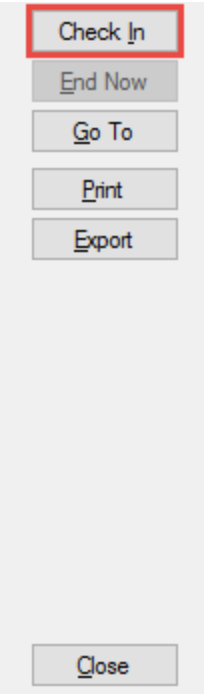
1. Select Booking Check In from the menu bar in EMS Desktop Client.



2. Set filters to search for bookings you want to check into.



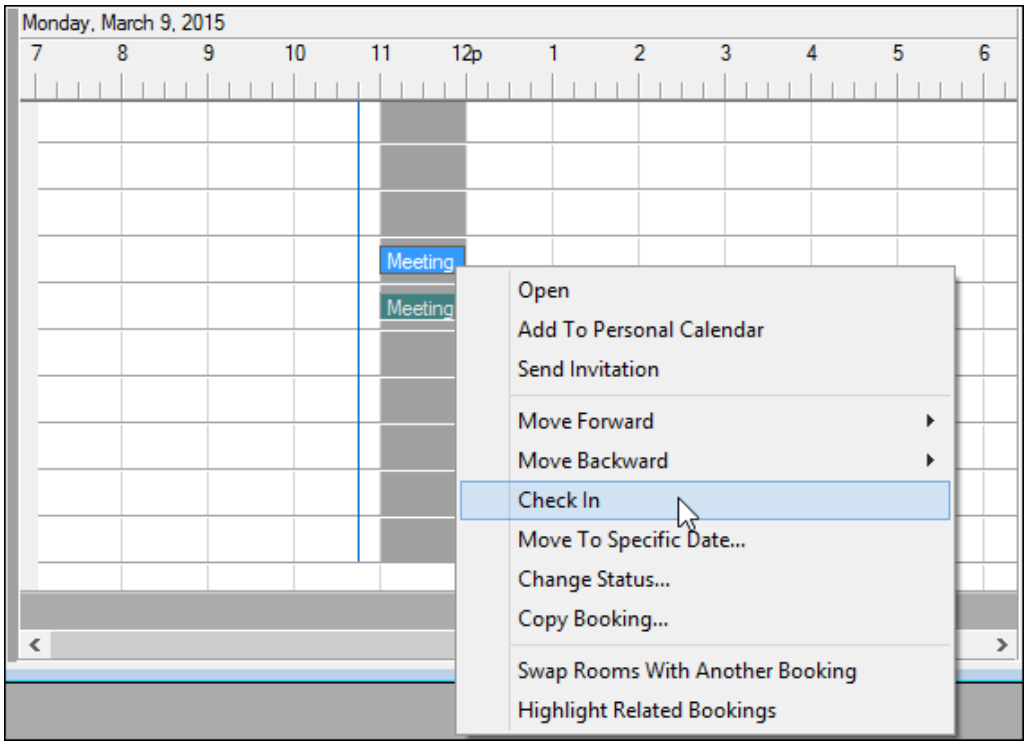
3. Select an event from the list of results that displays and click the Check In button.



Note:
This feature replaces the Building and Booking Check In tools in previous releases.

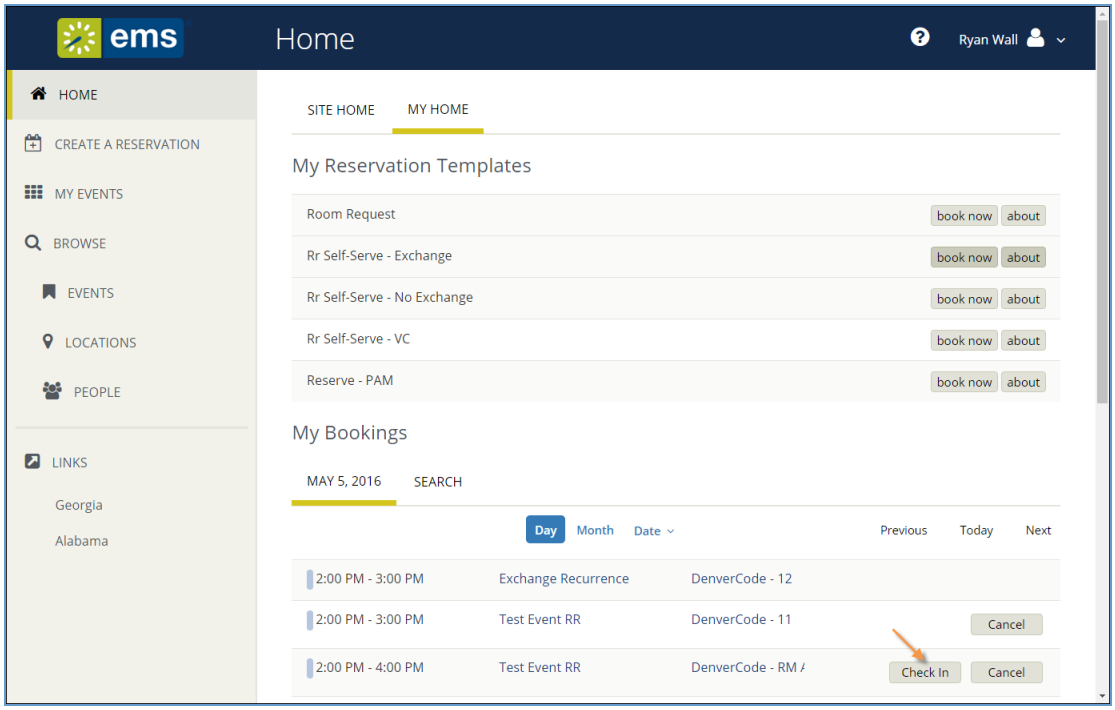
Check in from the Reservation Book

Bookings in the Reservation Book can be checked into by right-clicking on the booking and selecting Check In.



Check in from EMS Web App

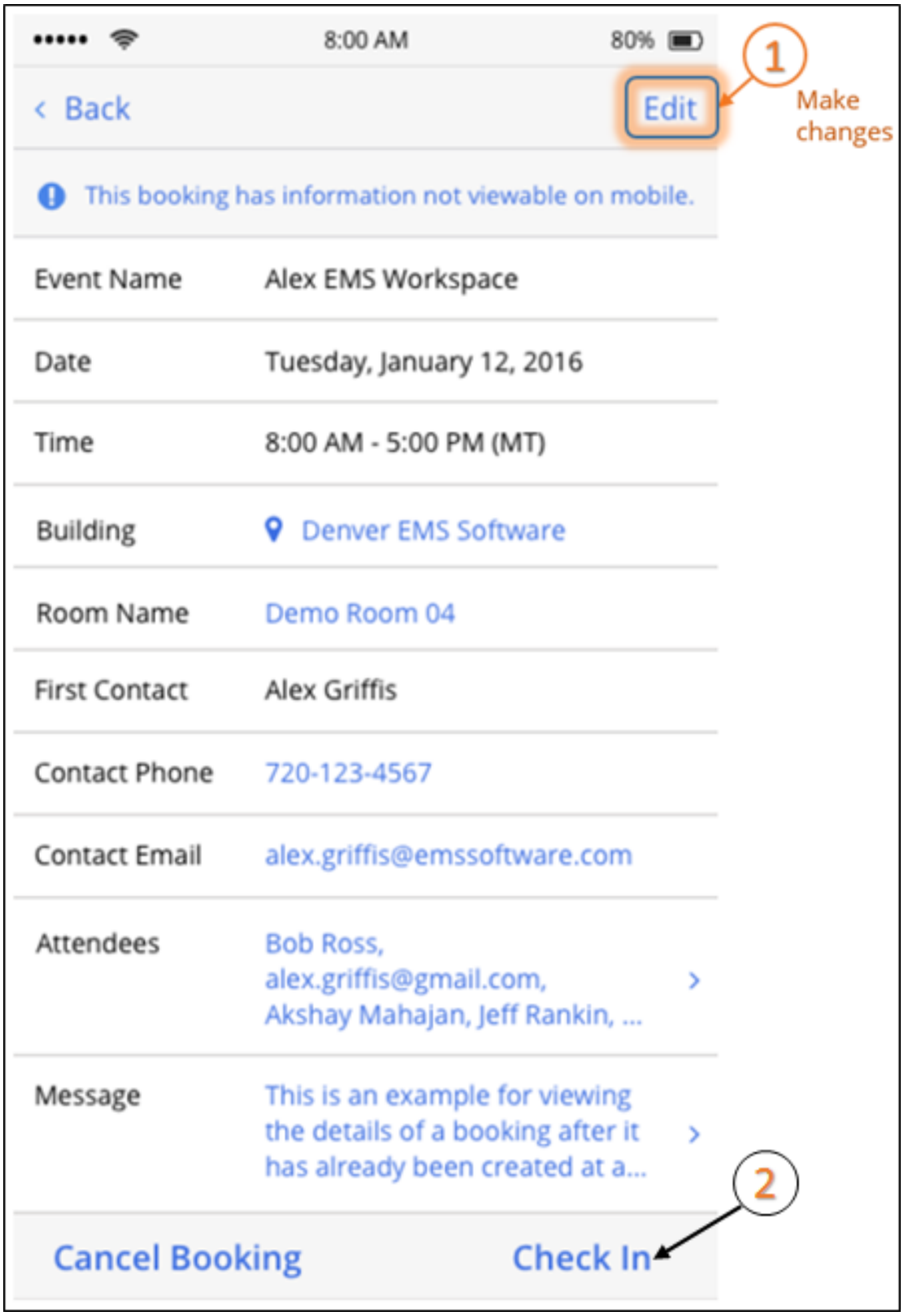
If authorized by your administrator, you can check into bookings in EMS Web App.



Check in with EMS Mobile App

1. From the Calendar on the Home page, locate the event you want to check in to.
2. If it is with in the pre-determined check-in time period, a Check In option will appear when you swipe right. The meeting organizer or booking template usually determines how soon before a meeting you can check in.
3. You can also Check In by opening and/or editing an event.
4. Tap on the event and click Edit in the upper right-hand corner.
5. Click Check In.

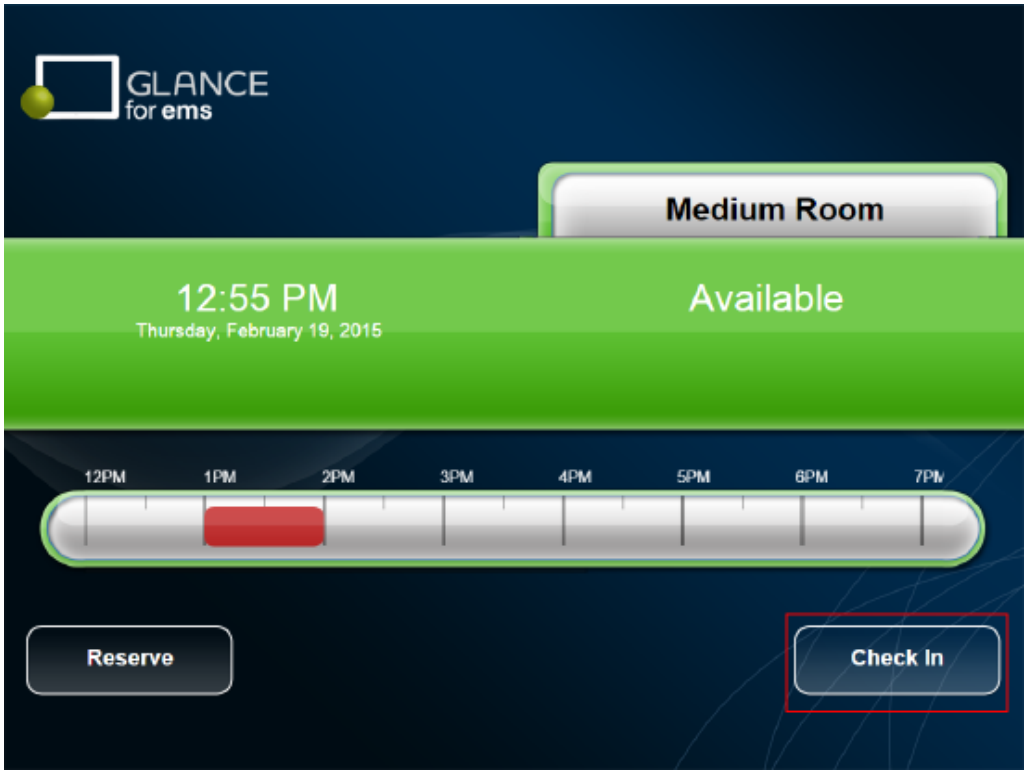
Accruent Confidential and Proprietary © 2019


8:00 AM
80%
Back
Edit
1
Make changes
This booking has information not viewable on mobile.
Event Name
Alex EMS Workspace
Date
Tuesday, January 12, 2016
Time
8:00 AM - 5:00 PM (MT)
Building
Denver EMS Software
Room Name
Demo Room 04
First Contact
Alex Griffis
Contact Phone
720-123-4567
Contact Email
alex.griffis@emssoftware.com
Attendees
Bob Ross,
alex.griffis@gmail.com,
Akshay Mahajan, Jeff Rankin, ...
Message
This is an example for viewing the details of a booking after it has already been created at a...
2
Cancel Booking
Check In

> **Note:**
> See Also: Inviting People

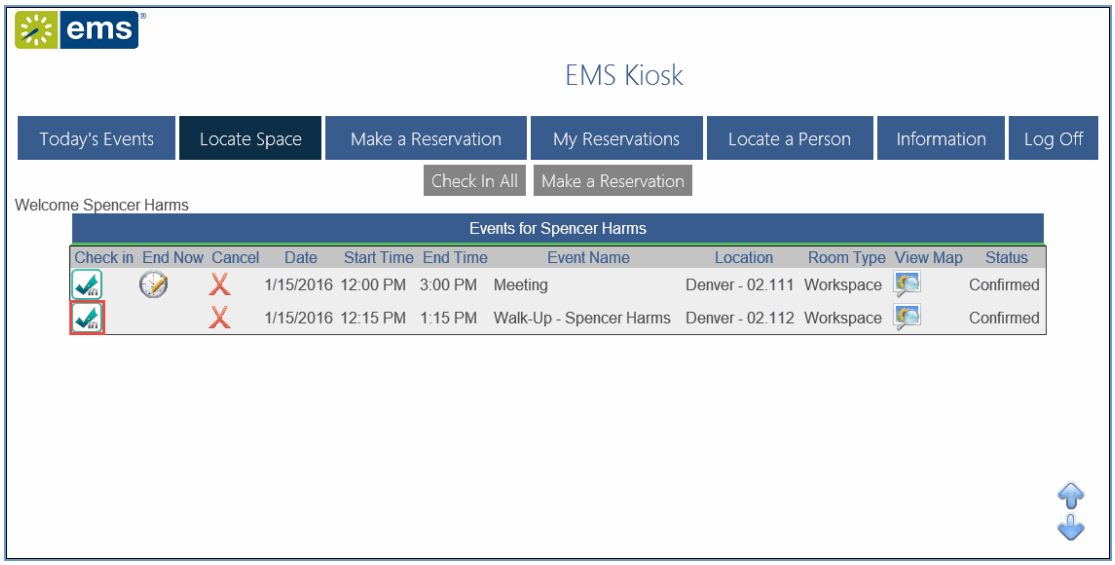
Check in with EMS Room Sign

Checking in on EMS Room Sign can be done at the Glance monitor by selecting the Check In button.



Check in with EMS Kiosk

Checking in on EMS Kiosk can be done at the Kiosk by selecting the Check In icon on the My Reservations screen.


ems
EMS Kiosk
Today's Events
Locate Space
Make a Reservation
My Reservations
Locate a Person
Information
Log Off
Check In All
Make a Reservation
Welcome Spencer Harms
Events for Spencer Harms
Check in
End Now
Cancel
Date
Start Time
End Time
Event Name
Location
Room Type
View Map
Status
1/15/2016 12:00 PM 3:00 PM Meeting Denver - 02.111 Workspace Confirmed
1/15/2016 12:15 PM 1:15 PM Walk-Up - Spencer Harms Denver - 02.112 Workspace Confirmed

CHAPTER 265: Manage Check In

When check in is enabled for room bookings, there are multiple ways to check in to those bookings. Since users can check into a booking from these various methods, this calls for oversight and management of the booking. This topic guides you in managing check ins for your room bookings.

Use the Booking Check In Dashboard

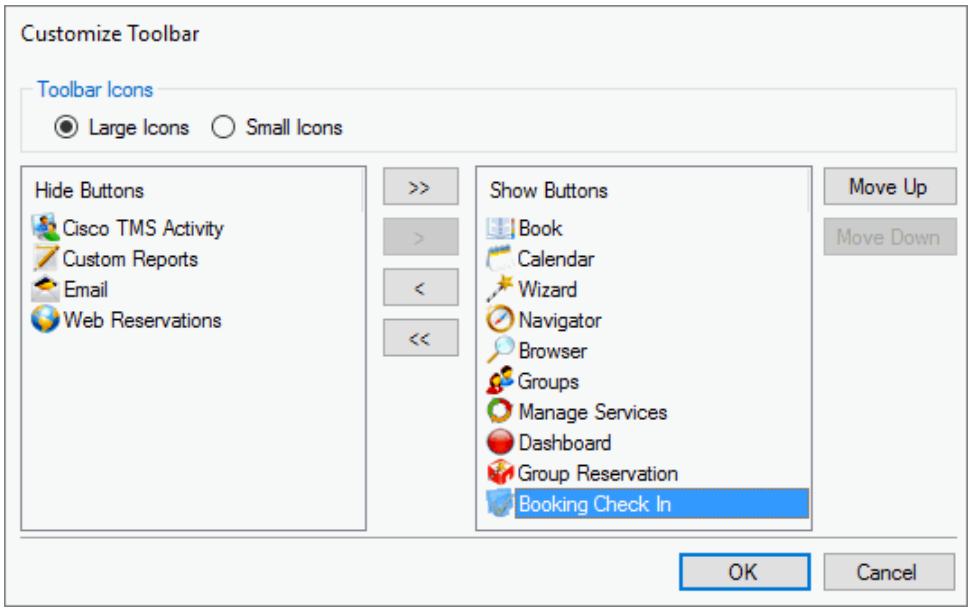
This dashboard is where EMS administrators manage bookings and each booking's check in status.

> **Note:**
> This dashboard is separate from the EMS Dashboard and replaces the separate Building Check In and Group Check-In Status dashboards that were available in older versions of EMS.

To open and use the Booking Bheck In Dashboard, follow these steps:

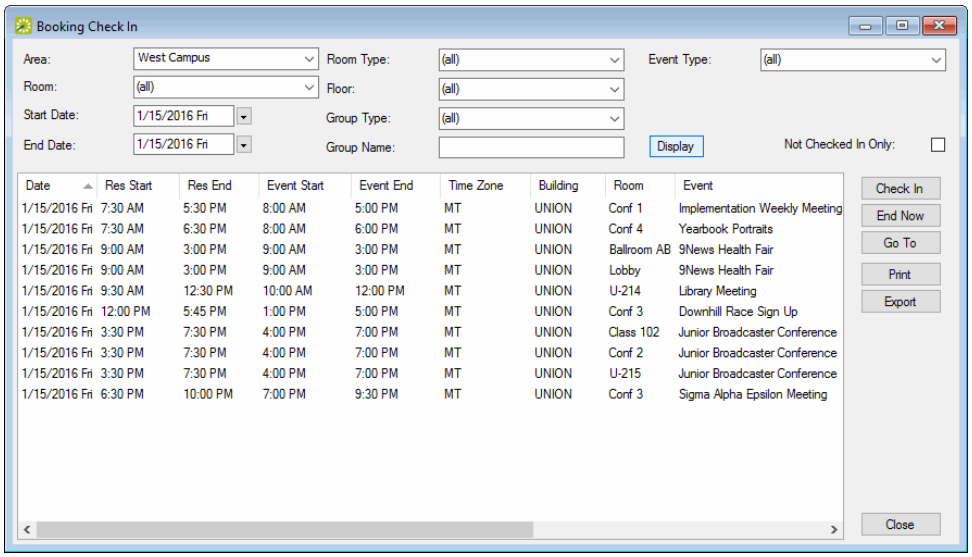
1. On the EMS menu bar, click **Reservations** > **Other** > **Booking Check In** to open the Booking Check In dashboard, or click the Booking Check In icon on the Toolbar.

> **Note:**
> You can add the **Booking Check In** icon to the Toolbar by right-clicking on the toolbar, then selecting **Customize**, and moving the **Booking Check In** to the **Show Buttons** side.



This window provides multiple options for EMS administrators to manage booking check in. It displays bookings and shows whether they have check ins.

2. Use the options in the Booking Check In window to view, modify, or control check ins for each booking. Use the options to view, modify, and control check ins for each booking.



Options on the Booking Check In Dashboard

Option	Description
Building/Area/View	The default value is (all), but you can select a specific Building, an area, or a view.
Room Type	The default value is (all), but you can select a specific room type.
Event Type	The default value is (all), but you can select a specific event type.
Room	The default value is (all), but you can select a specific room.
Floor	The default value is (all), but you can select a specific floor.
Start Date End Date	The default value is the current day's date, but you can select a different value.
Group Type	The default value is (all), but you can select a specific Group type.
Group Name	Allows the user to search for a Group to check in to their booking.
Not Checked In Only	Select this option to search only for bookings that have not been checked into.
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.
Export	This will export the information to a Microsoft Excel file.

CHAPTER 266: Reports and Queries

EMS provides more than 110 reports and a custom query builder for use throughout the meeting and event lifecycle—from setup and invoicing to billing and utilization analysis. These "one-way integration" reports generate static reservation, service, billing, resource, and other information in .xml, .xls, comma-delimited, and .txt formats. This data can be read and parsed by many other software applications. These reports are categorized as follows:

- Daily: Summary, service, and other reports that describe activities over one or more days.
- Sales: Details of sales associated with reservations, resources, and more.
- Statistics: Insights you need to understand use and organizational activity.
- Exception: Clarifies the incorrectly run or allocated resources, templates, or systems.
- Billing: All reports for transactions, invoices, and other statements.
- Hoteling: Reports specific to office hoteling practices and QR codes for room cards.
- Other: Summary reports on cancellations and reservations.

The reports that you can send automatically include Reservation and Sales/Statistics Queries and all Saved Daily and Statistics Reports. You can send reports according to whatever frequency, time, time zone, and reporting period you choose, and you can customize the sender, subject, and message information. To set up Automated Reports, your organization will need to install and configure the EMS Automated Report service.

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.



Note:

Reports that are specific for the Billing function in EMS are detailed in Billing.

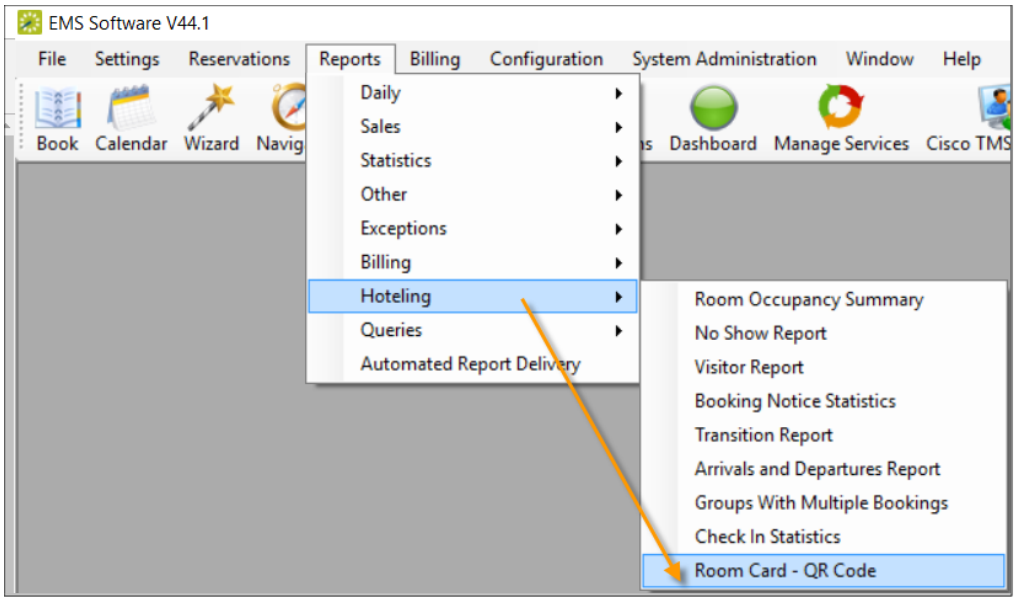
See Also:

- Report Descriptions and Options
- Generate an EMS Report
- Generate an EMS Billing Report
- Generate Attendee Visitor Reports
- Configure Automated Reports
- Work with Saved Reports
- Work with a Query

CHAPTER 267: Report Descriptions and Options

This section describes EMS reports by category, and defines especially important fields and settings for each report. The following provide information about the various reports:

- Daily Reports
- Sales Reports
- Statistics Reports
- Other Reports
- Exceptions Reports
- Hoteling Reports
- Invoice Reports
- General Reports



Daily Reports

Daily reports are able to be set to send as an email automatically. To learn more about Automated Reports, see Create Automated Reports.

Report	Description	Options
Event Schedule	A summary of the events that are scheduled at your facility, sorted by date	• Use Page Breaks - If the report is run across multiple days, then

Report	Description	Options
	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.	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 3pm Thursday through 10am 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

Report	Description	Options
		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.
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 3pm Thursday through 10am 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.

Report	Description	Options
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 3pm Thursday through 10am Friday. If this option is selected, then the booking is displayed only for Thursday in the report.
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 3pm Thursday through 10am 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.

Report	Description	Options
		• 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 EMS Web App 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.
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.

Report	Description	Options
		• 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 EMS Web App 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 EMS Web App for a booking detail item are displayed in the report.
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—

Report	Description	Options
		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 EMS Web App 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

Report	Description	Options
		number available in inventory at that time are displayed in the report.
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.	
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 EMS Web App 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 Dis-

Report	Description	Options
		counts. • 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 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

Report	Description	Options
		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.
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	Lists the sales that are associated	• Display Amount—Select from

Report	Description	Options
Reservation	with a reservation where the reservation or booking status was changed.	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 data analysis functionality. To View and analyze 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.

Statistics reports are able to be set to send as an email automatically. To learn more about Automated Reports, see Create Automated Reports.

Note:
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.
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.

Report	Description	Options
		• 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.

Report	Description	Options
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.
Room Availability	Provides a count of room availability by room type for a given date range.	
Setup Count Analysis	Lists the total number of bookings by setup count.	
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
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).
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.
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.

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 3pm

Report	Description	Options
		Thursday through 10am 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.	
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.	
Booking Conflict Analysis	Reviews information on all bookings for a date or date range and lists any conflicts	

Report	Description	Options
	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.	
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.	
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.	
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.	
Invalid Service	Lists the service orders that have a start time and/or end time that fall outside the reserved time for the room.	

Report	Description	Options
Orders	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.")	
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."	
Inactive Web Process Templates	Displays the inactive web process templates that are attached to reservations.	

Hoteling Reports

> **Note:**
> In Version 44 the Early Checkout Report was removed. This category of reports is not supported for EMS Professional.

Report	Description	Options
Room Occupancy Summary	Displays, by building and room type, the number and percentage of rooms occupied.	
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, EMS Glance, or EMS Web App.	
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).	
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.	
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.

Report	Description	Options
		• Highlight Changes Made Within: (days)—Changes that have been made within the specified number of days are high-lighted 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.	
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.	
Room Card - QR Code	Allows you to print QR Codes that can be placed outside rooms to be used within EMS Mobile App. For complete instructions in configuring and generating QR codes, See Also: Configure QR Codes.	
Check In Statistics	Lists the percentage of bookings that have been checked-in to by building, building-room type, or room type. **Note:** A customer can be checked in via the EMS Kiosk, the EMS Desktop Client, or EMS Web App.	

Invoice Reports

Report	Description
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.

General 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.
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 preconfigured 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

Report	Description	Options
		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.)
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.	• Currency—Select the currency for the billing transactions.

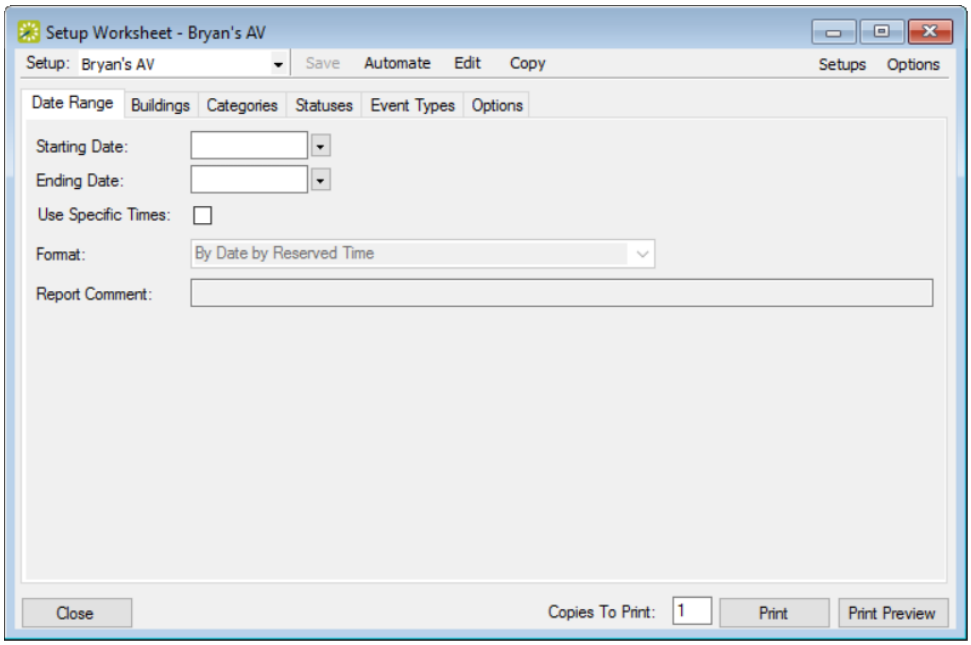
Report	Description	Options
	Note: If the report is generated in Standard format, deposits are not shown as transactions if they have been absorbed by the generation of an invoice. **Note:** You can also generate the Transaction Report from within a reservation to see only transactions for the selected 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.	
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 Reprint an Invoice 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.)

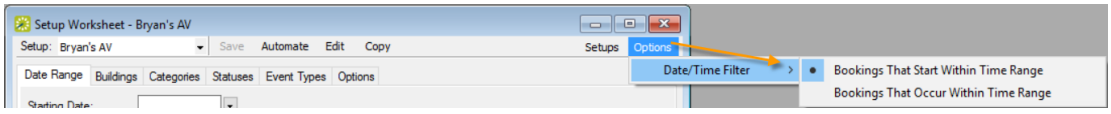
CHAPTER 268: Generate an EMS Report

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 saved 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.

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** > **Setup Worksheet**. A report setup window displays where you can set up your report. Shown below is one for a Setup Worksheet.



2. On the Setup drop-down list, do one of the following:
   - To generate the report according to your filter settings (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, select the saved report on the Setup list, and then go to Step 5.
3. On the Options list, select the **Date/Time Filter** by which to generate the report.



4. Specify the report parameters, options, and format. For brevity and ease, the parameters and options that are available for each report are discussed in Report Descriptions and Options. Billing reports are discussed in Billing. Academic reports are discussed in Academic Planning (EMS Campus). For descriptions of each type of report, refer to:
   - Daily Reports
   - Sales Reports
   - Statistics Reports
   - Other Reports
   - Exceptions Reports
   - Hoteling Reports
   - Invoice Reports
   - General Reports
5. On the Report Setup window, you can:
   - Add a comment to be printed in the report in the Report Comment field (only available on certain reports; maximum of 255 characters, including spaces).
   - Click **Print Preview**. A preview of the report opens onscreen.
   - 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, options, and format you specified. If you want to save settings so you do not have to adjust them every time you run the report, you can save the report. See Also: Work with Saved Reports.

CHAPTER 269: Generate 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 saved settings. (For detailed information about a saved report, see Work with Saved Reports.) 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.

> **Note:**
> 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. Contact your EMS administrator if you need assistance in generating any of these report.

Generate a Billing Report

To generate an EMS billing report, follow these steps:

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**.

> **Note:**
> All Billing reports other than the Billing Worksheet report are also available from **Reports** > **Billing**.

2. On the Setup drop-down 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, select the saved report, and then go to Step 4.

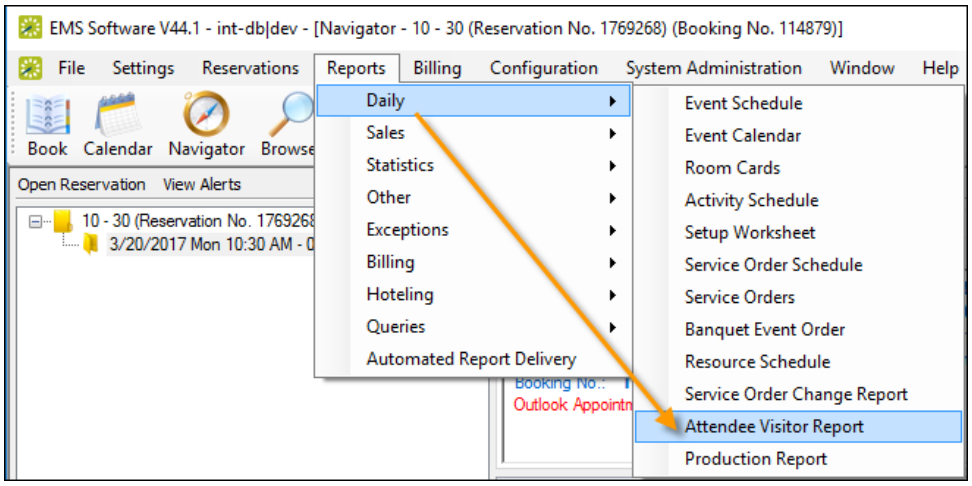
> **Note:**
> For detailed information about saved reports, see Work with Saved Reports.

3. Specify the report parameters, options, and format. See:
   - Invoice Reports
   - General Reports
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 save the report. See Work with Saved Reports.

CHAPTER 270: Generate Attendee Visitor Reports

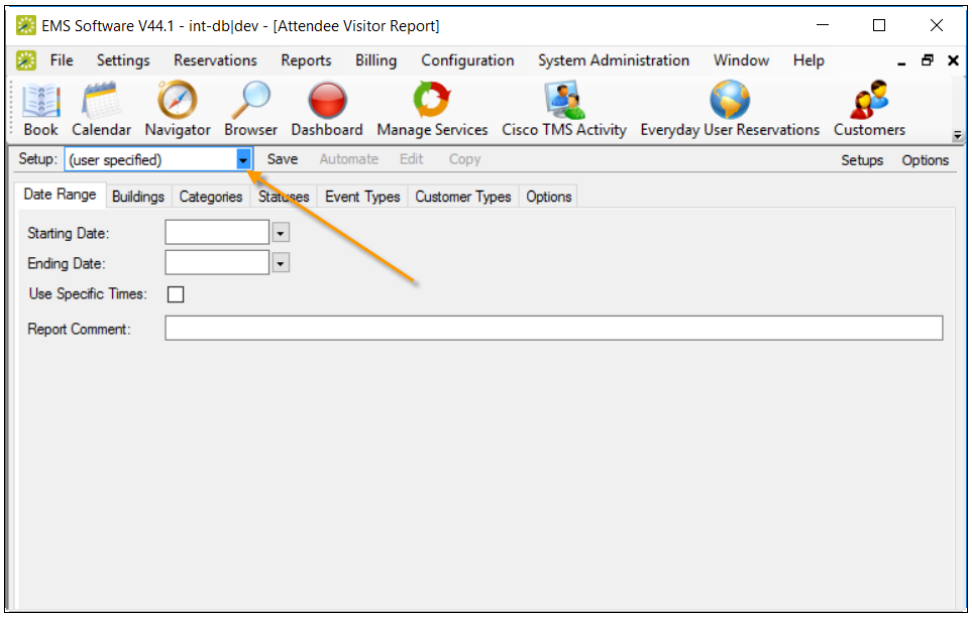
To generate a daily report of visitors, follow the steps below.

1. On the main menu, click **Reports** > **Daily** > **Attendee Visitor Report**.



Access Attendee Visitor Report from the Reports Menu

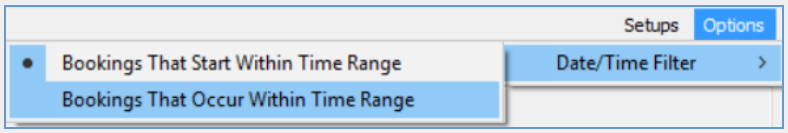
2. On the Setup drop-down list, you can select from a list of saved visitor reports for your organization, or you can set your own report parameters, options, and so on (leave "user specified" selected and populate the fields on each tab as needed). If using a saved report Setup, simply specify a date range.



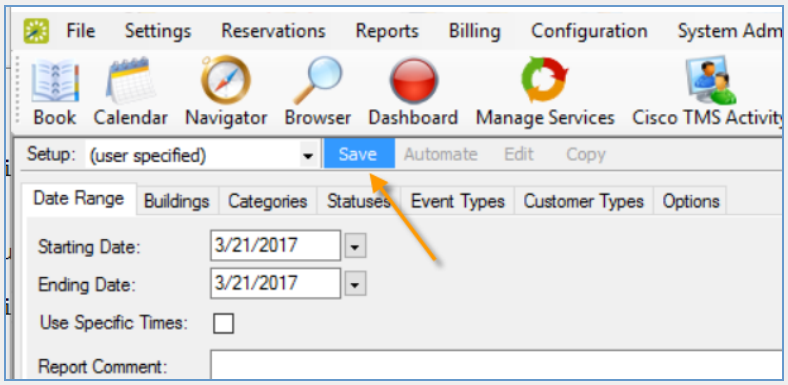
Setup Drop-Down List of the Attendee Visitor Report Dialog Box

Note:

You can edit saved report setups from the Setups option in the upper right corner. Additionally, you can quickly specify a date range based on when bookings start or when they occur using the Options menu next to it.



To save your (user specified) report for future use (so that it is listed in the Setup drop-down): click **Save** next to the Setup field.



3. To run the report once you have specified parameters, click **Print**. When finished, click **OK** on the Print dialog and click **Close** on the Attendee Visitor Report dialog box.

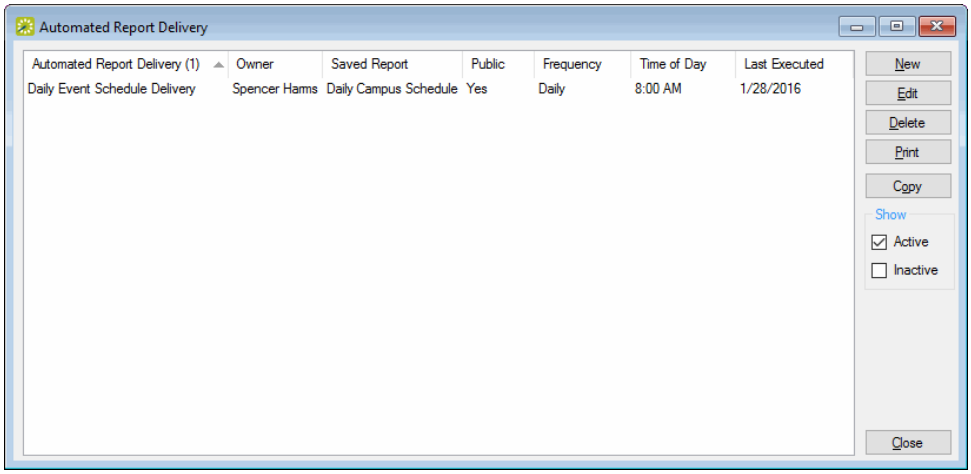
CHAPTER 271: Configure Automated Reports

EMS is able to send reports daily to selected email addresses. Reports that can currently be automated to send are Reservation and Sales\Statistics Queries and all Saved Daily and Statistics Reports under the EMS Reports menu. To learn more, see creating Queries or Saved Reports. Automated Reports can be set up and emailed to selected individuals. Automated Reports use predefined Queries and Saved Reports. An email will be sent to the users defined in the Automated Report Delivery with either the information requested through the report or with an email stating there was no data to display.

For Automated Reports to be sent, the EMS Automated Report service needs to be installed and configured. For directions on installing and configuring the service, see Installing the EMS Automated Report Service.

1. On the EMS menu bar, click **Reports** > **Automated Report Delivery**.

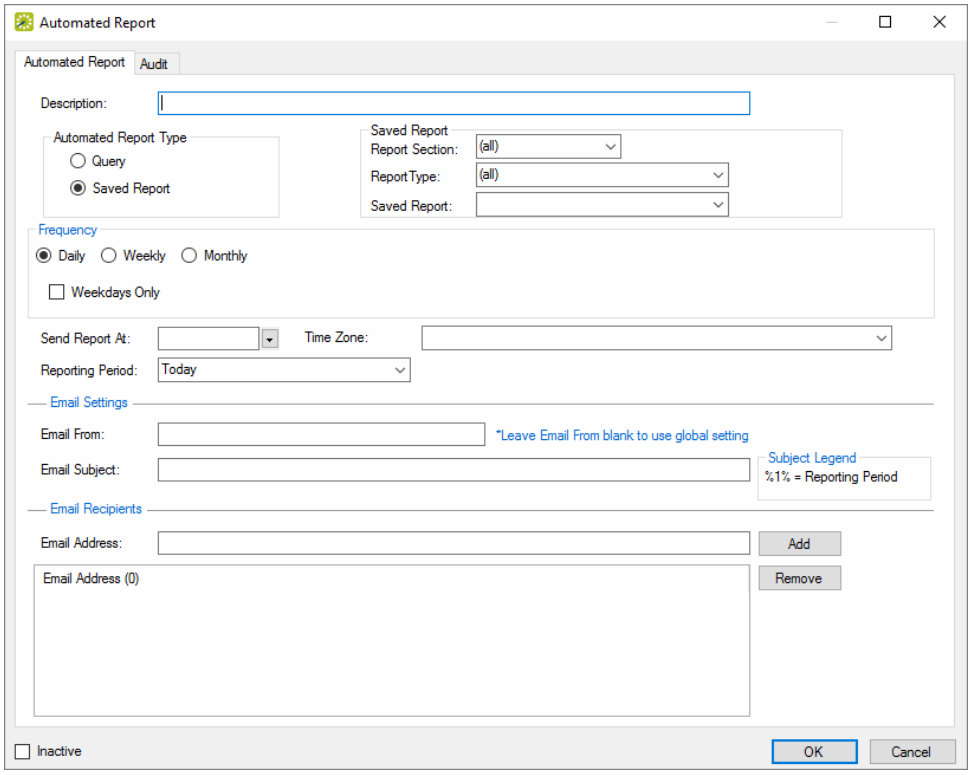
   The Automated Report Delivery window opens. This window lists all Automated Reports that are currently configured in your EMS database and that have a status of Active.



> **Note:**
> To view any deactivated Automated Reports check the **Inactive** checkbox in the Show section of the window.

2. Click **New**.

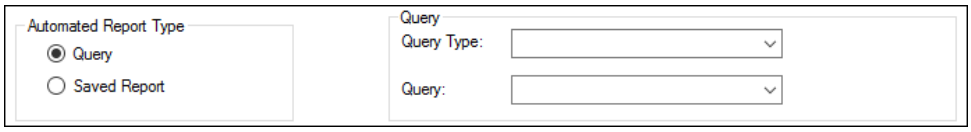
   The Automated Report window opens.



3. In the **Description** field, enter a name or description for the new Automated Report.

   The Automated Report Delivery description should specify the type of delivery, such as Daily Event Schedule Delivery.

4. In the Automated Report Type area, specify if this report is a **Query** or **Saved Report**.



Concept: Queries and Saved Reports
Query

- **Query Type:** limits the displayed Queries to either Reservation or Sales\Statistics.
- **Query:** Shows the available Queries to Automate based on either Query Type, or if no Query Type is selected it will display all Reservation and Sales\Statistics queries.

Saved Report

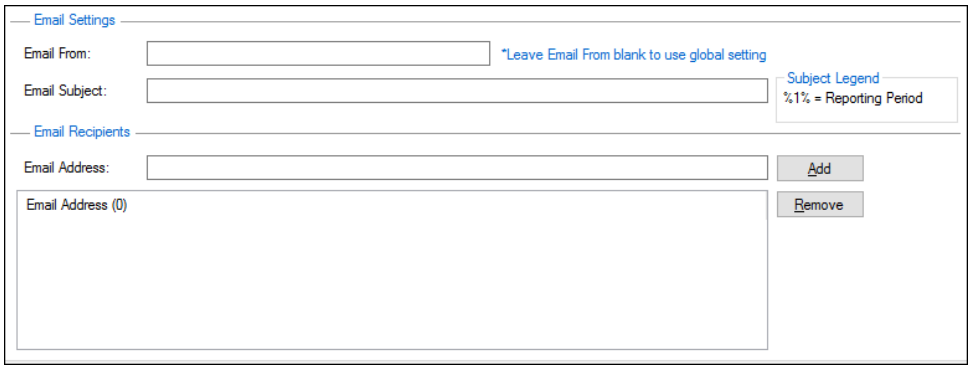
- **Report Section:** Set to (all) by default, but can be modified to either Daily or Statistics to limit the Report Types that will be shown.
- **Report Type:** Set to (all) by default, but can be modified to a specific Daily or Statistical report to filter the saved reports.
- **Saved Report:** Displays the Saved Reports that are available to be automated.

5. Specify the Frequency using the options described in the following list:



- **Daily/Weekly/Monthly:** Determines the frequency that the report will send.
  - **Daily:** will send every day at the specified time.
  - **Weekly:** Can be set to a single day every week or multiple days every week.
  - **Monthly:** Can specify a specific day each month (1-28) or the last day of the month.
- **Send Report At:** Determines the time each day that the Automated Report will send.
- **Time Zone:** Determines the time zone for the time selected for the report to send. Time and Time Zone correlate to the database server and the server on which the Automated Report Service is installed.
- **Reporting Period:** Determines the dates which the report will be automated for. Choose from multiple options in the drop-down list to customize the reports.

6. Specify Email Settings and Email Recipients using the options described in the following list:



- **Email From:** Enter the Email From address for the Automated Report.
    - If you leave the Email From field blank, then the Email From address entered in the EMS Automated Report Service is used.
- **Email Subject:** Enter the title for the email that will contain the Automated Report.
    - If the Subject line is left blank, the Automated Report description will be used as the email subject.
    - A variable can be used to put information into the subject line as described in the Legend. %1% is the code for the Reporting Period, so "Event Schedule for %1%" results in "Event Schedule for Tomorrow" being displayed in the subject line.
    - You can look up Email Addresses by clicking the **Add** button, which selects from the Global Address Book. In the Email Address field, for each user and/or group that is to receive the Automated Report, enter the appropriate email address, and then click **Add**.

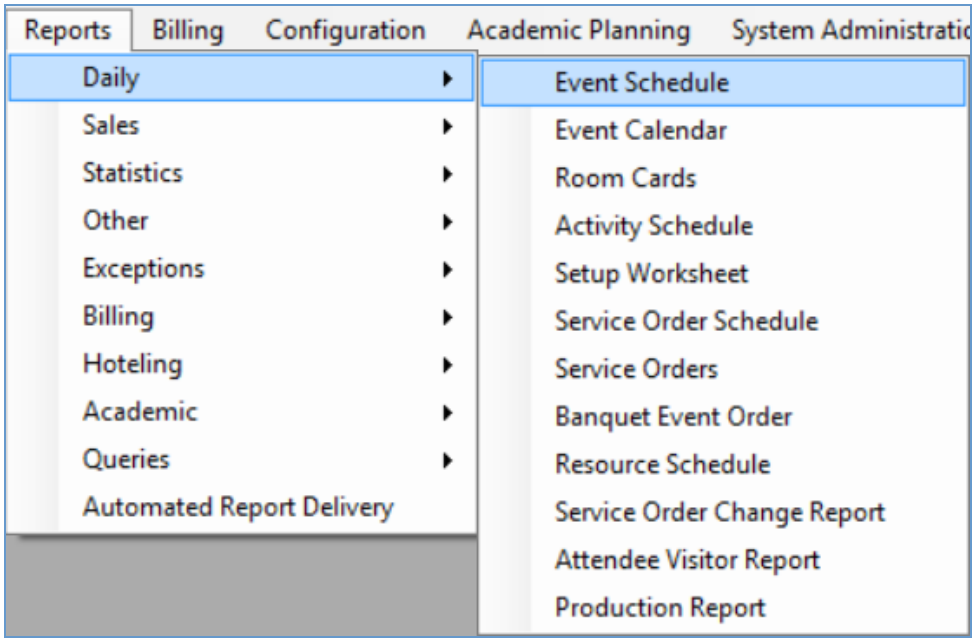
CHAPTER 272: Work with Saved Reports

A saved report is a report for which the filter settings have been saved so that you do not have to adjust the filter settings every time you run the report. You can create a saved report from a new saved report, or you can copy an existing saved report, and edit the filter settings as needed to create a new saved report. If you are the owner of a saved report, you can also edit the name of an existing saved report and you can delete a saved report. To learn more about creating Automated Reports from Saved Reports with EMS, see Create Automated Reports.

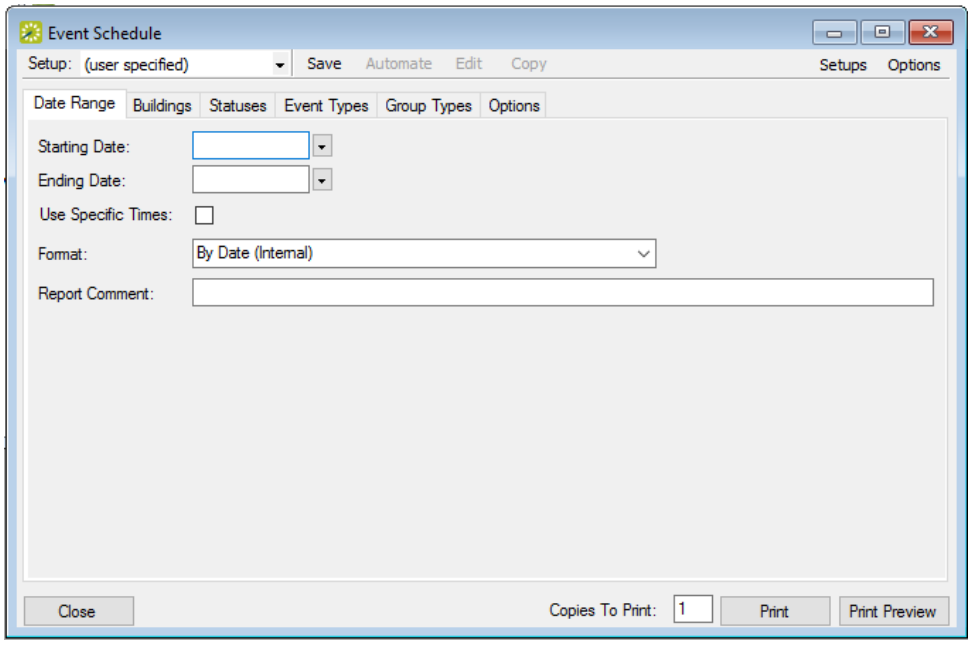
Note:
Although this topic is written from the perspective of reports, it is also applicable for working with saved confirmations and invoices.

To work with saved reports, follow these steps:

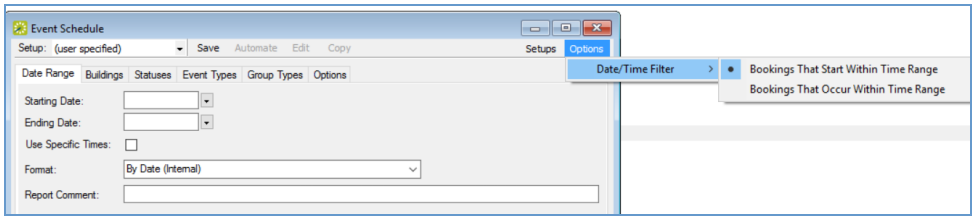
1. Open a report you want to save. From the EMS menu bar, click **Reports** to open the Reports menu, and then select the report type and the report name.



2. The Event Schedule window opens where you can set your report preferences.

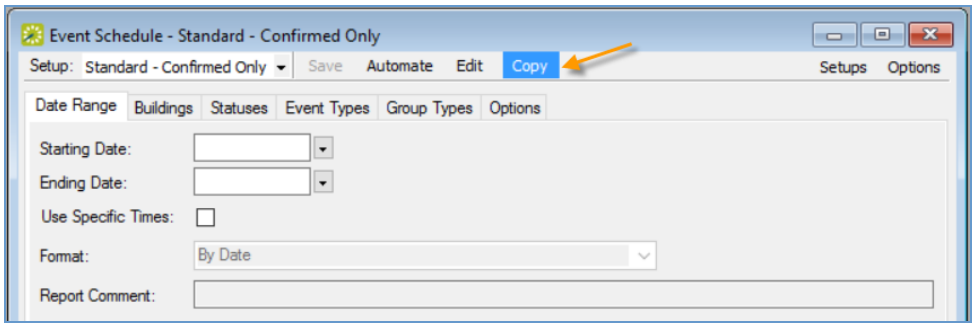


3. Click **Options** in the toolbar to set the Date/Time by which to generate the report.

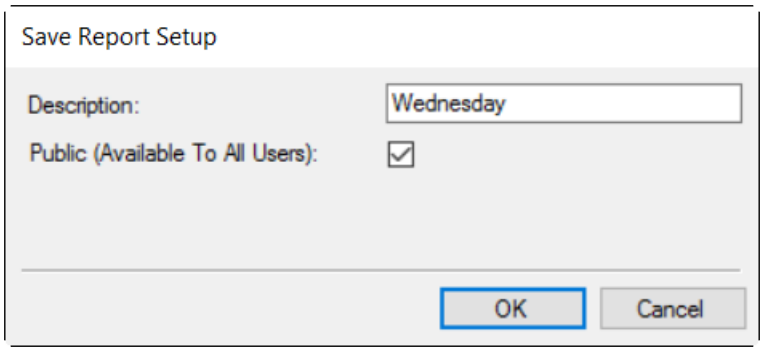


4. Specify your report preferences: parameters, options, and format.

5. If you want to copy or edit a saved report, select it from the Setup field. The options at the top of the window change so you can **Automate**, **Edit**, or **Copy** the saved report.



6. On the dialog box that presents, click **Save** or **Copy**. The Save Report Setup dialog box opens so you can name the new saved report.

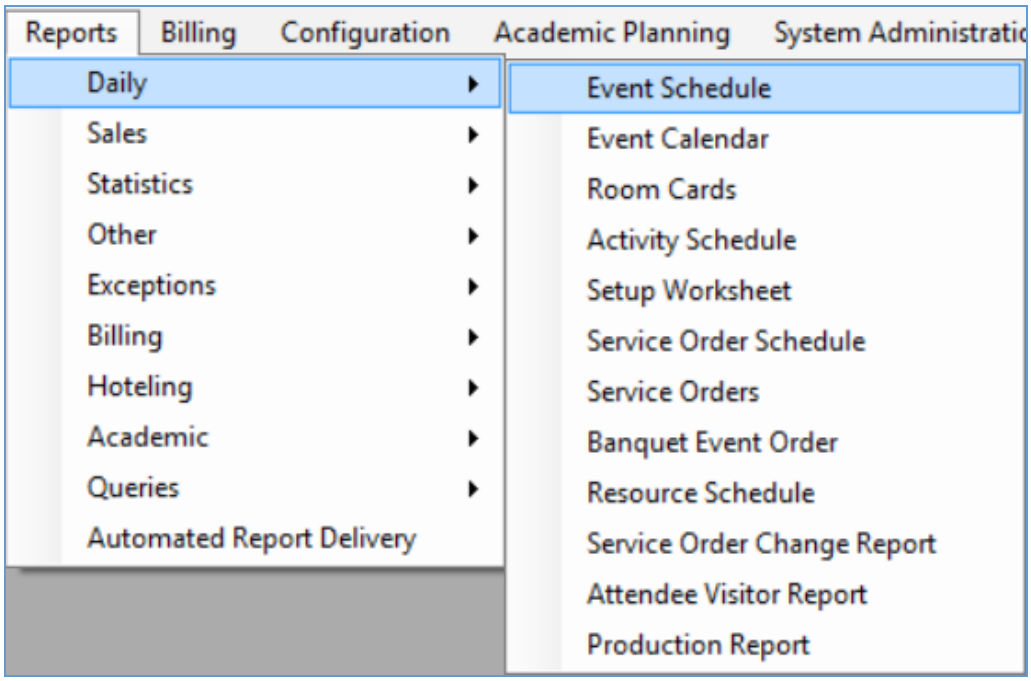


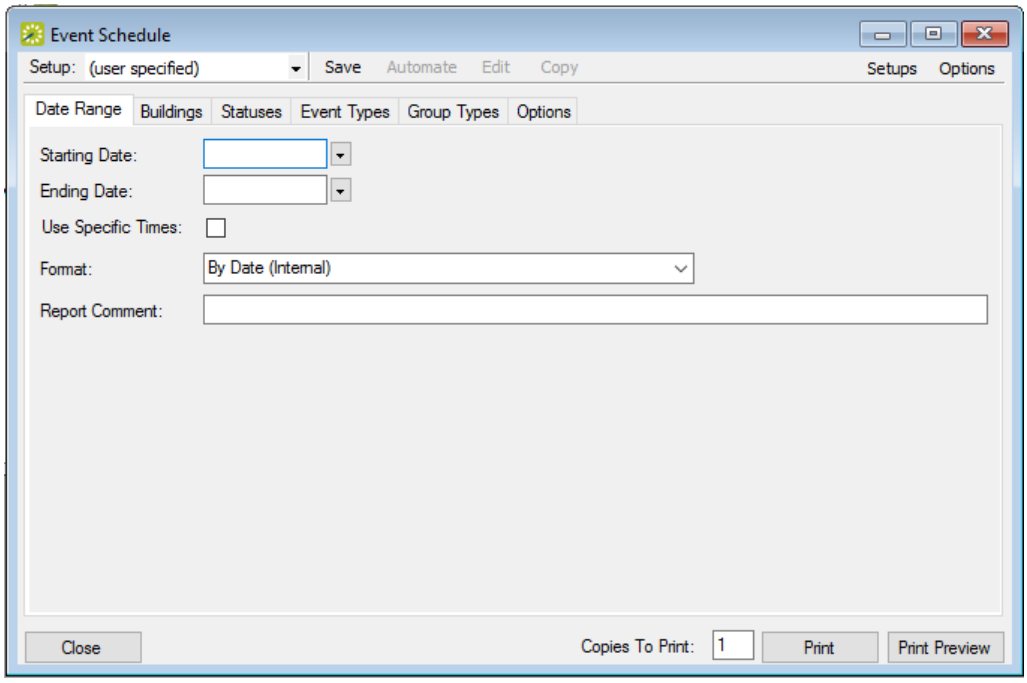
7. Enter a Description field (maximum of 50 characters). If you are an administrative user, and the report is to be available to all users, then select **Public (Available to All Users)**. If the report is to be available only to you (the owner), then leave this option unchecked. If you are not an administrative user, only your EMS administrator can make your saved reports available to all users. Contact your EMS administrator for assistance.

8. When you have set up your new or copied report, click **OK**. The Save Report Setup dialog box closes and you return to the Report dialog box. The saved report is now an option on the Setup drop-down list.

Rename or Delete a Saved Report

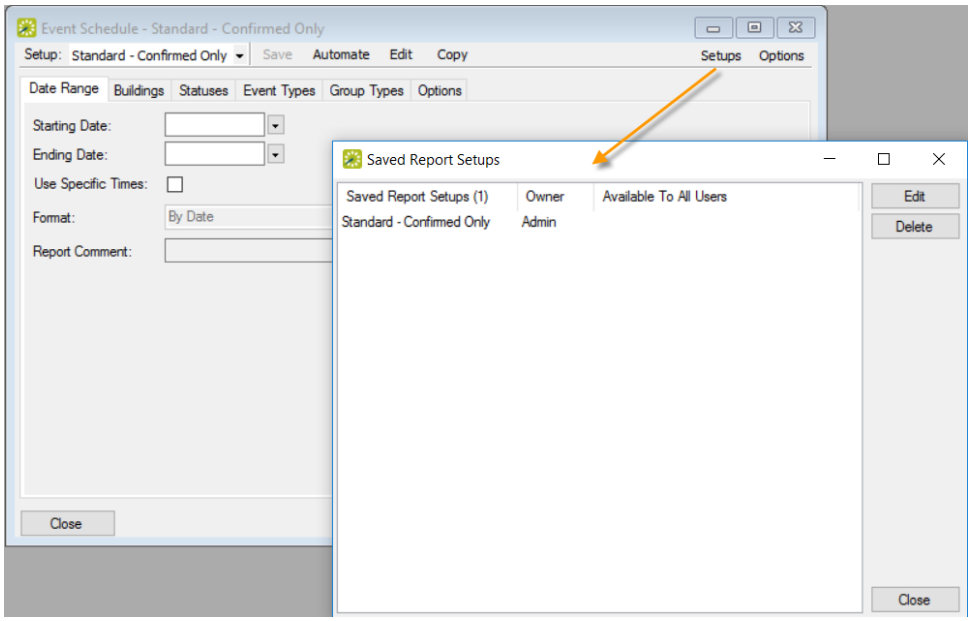
1. Open a report you want to edit or delete. From the EMS menu bar, click **Reports** to open the Reports menu, and then select the report type and the report name.





Example of an open report

2. On the report window, click **Setups**. The saved Report Setups dialog box opens. This dialog box lists all the saved report setups for which you are the owner, and therefore can edit the name and/or delete the report.



Note:

Administrative users can edit and delete all saved reports in the system, and can make reports available to all users. See Also: Manage Saved Reports.

3. Select a saved report setup, and then do one of the following:
   - To rename the report, click **Edit** to rename of the report in the Description field.
   - To delete the report, click **Delete**, and then click Yes to confirm.

CHAPTER 273: Work with a Query

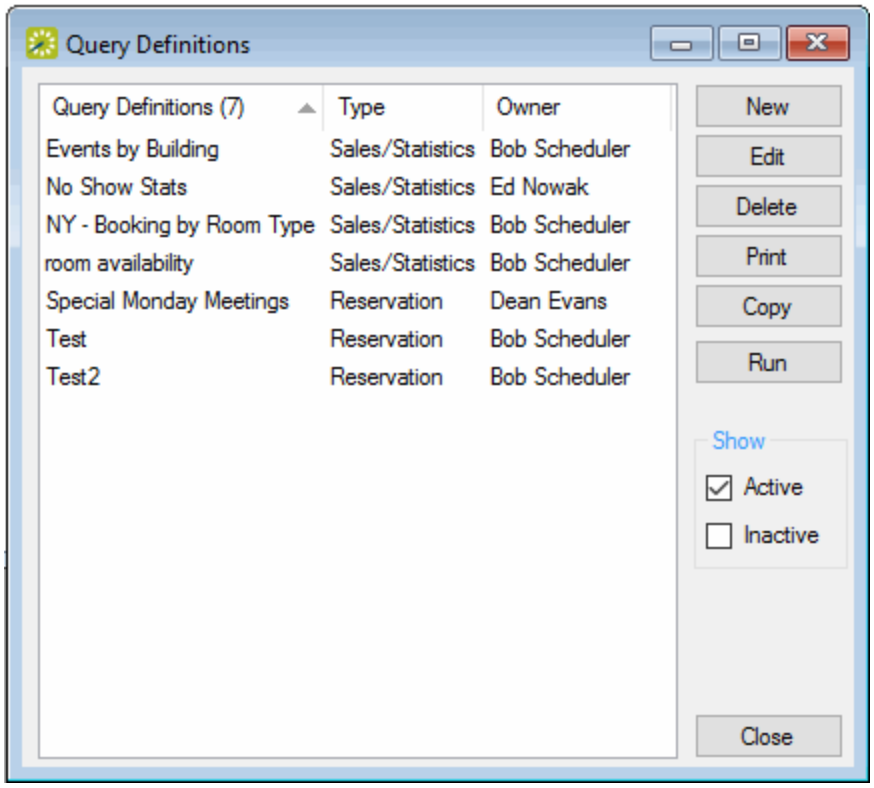
A query is the primary mechanism for retrieving information from a database. A query consists of questions that are presented to the database in a predefined format. A Query Builder function is available from the Reports menu. You can use this function to create queries for retrieving information from 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 a newly created query, 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's filters.

This topic provides information about the following:

- Create a Query
- Edit a Query
- Delete a Query
- View and Print a Query's Filter
- Run a Query

Create a Query

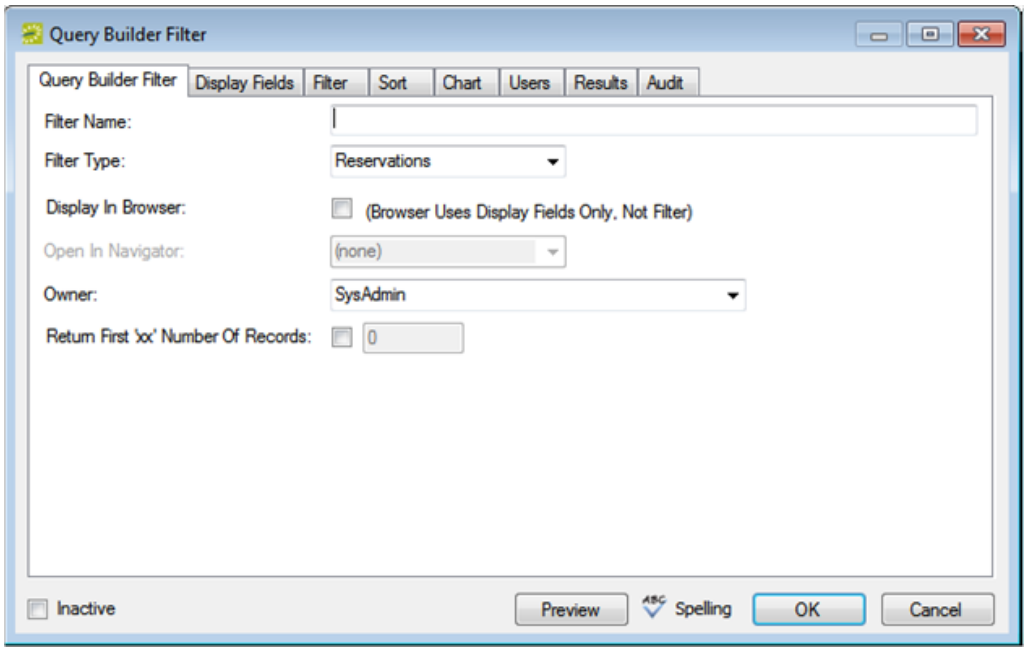
1. On the EMS menu bar, click **Reports** > **Queries** > **Query Builder**. The Query Definitions dialog box opens. The dialog box displays all the queries that have been previously defined in your EMS database and that have a status of Active.



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

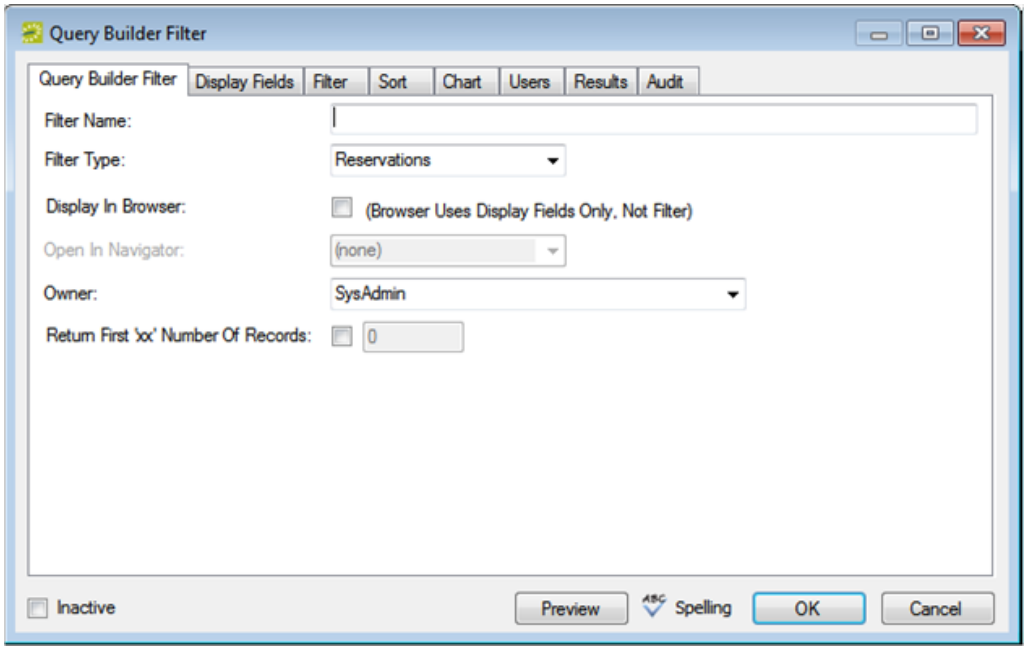
2. Do one of the following:
   - To create a query from scratch, click **New**.
   - To create a query by editing an existing query, select the query that is to be edited, and then click **Copy**.

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.



3. Enter or edit the needed information for the query. See:
   - Query Builder Filter tab
   - Display Fields tab
   - Filter tab
   - Sort tab
   - Chart tab
   - Users tab
4. 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



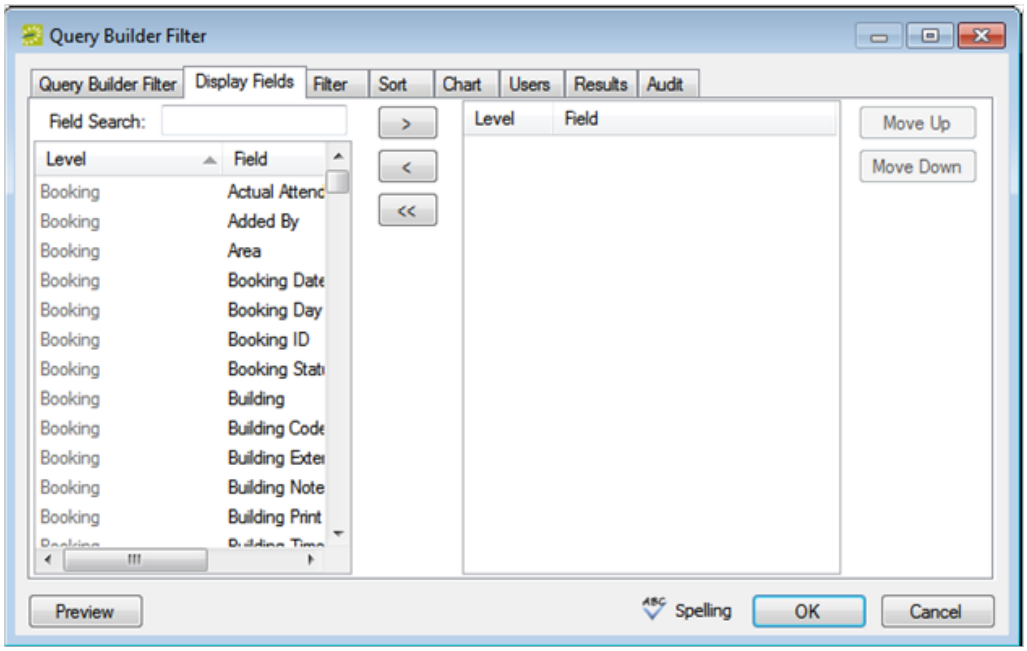
1. On the **Query Builder Filter** tab, name and define the query.

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.

Option	Description
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



Query Builder Filter dialog box, Display Fields tab

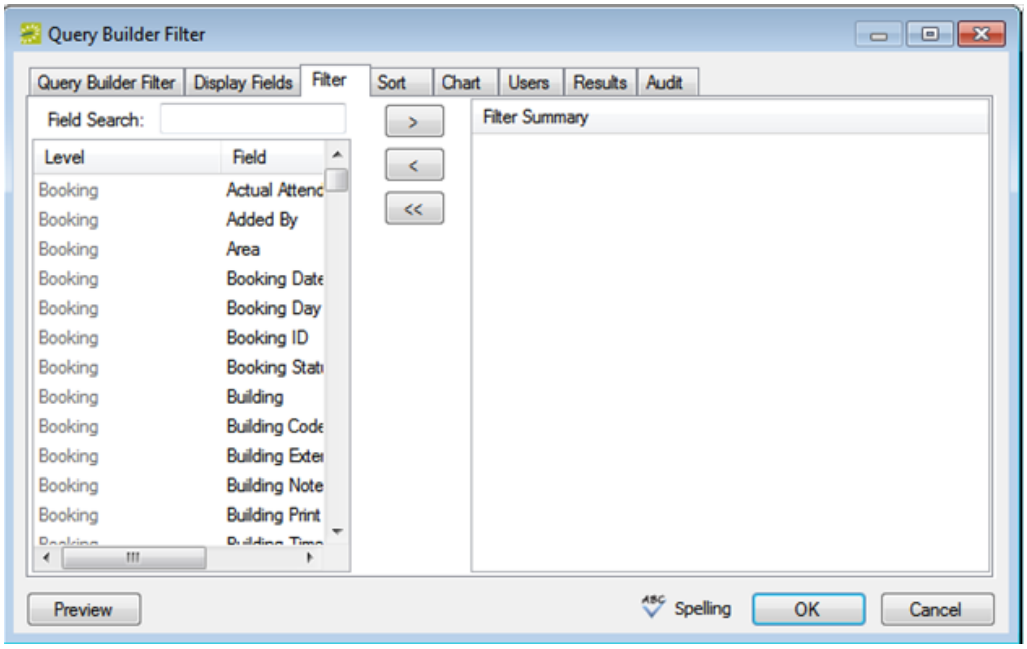
1. Open the **Display Fields** tab, and then do one of the following:
   - Select the field, or CTRL-click to select the multiple fields that are to be displayed in the query results, and then click the Move button (>) to move the selected fields to the Selected list.
   - In the Field Search field, 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.

Note:
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 Added By and Date Added. As you enter the search string, the Available Fields list is dynamically updated with a list of fields that meet the search criteria.

> **Note:**
> 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



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.

Note:

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 and1st Contact. As you enter the search string, the Available Fields list is dynamically updated with a list of fields that meet the search criteria.

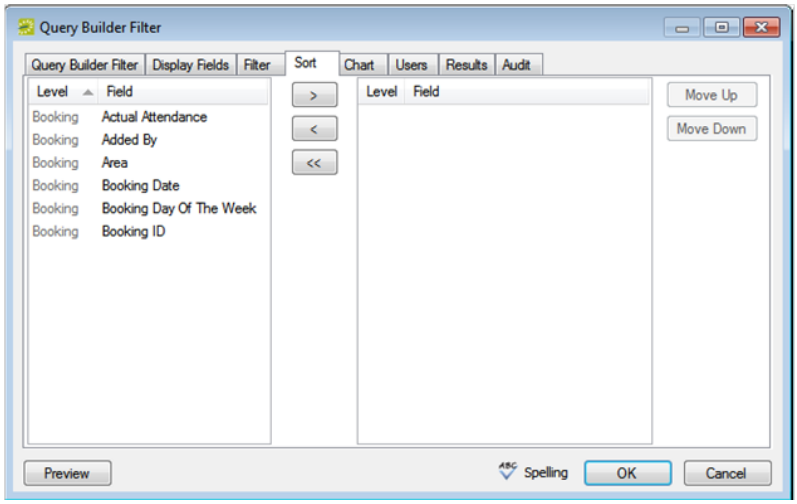
For each field that you select, a dialog box opens in which you must specify the allowed values for the field. After you specify the values and click **OK**, the dialog box closes, and the selected field is moved to the Filter Summary list.

Note:

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.

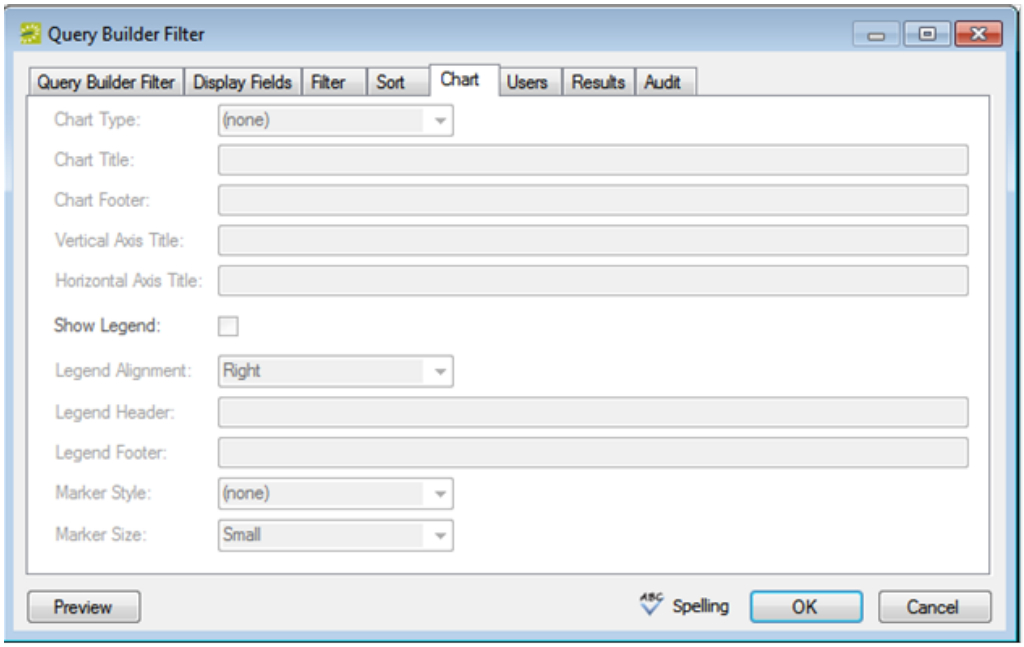
2. Continue with any other configuration for the query as needed, or do one of the following:
   - Click **OK** to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when 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



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.

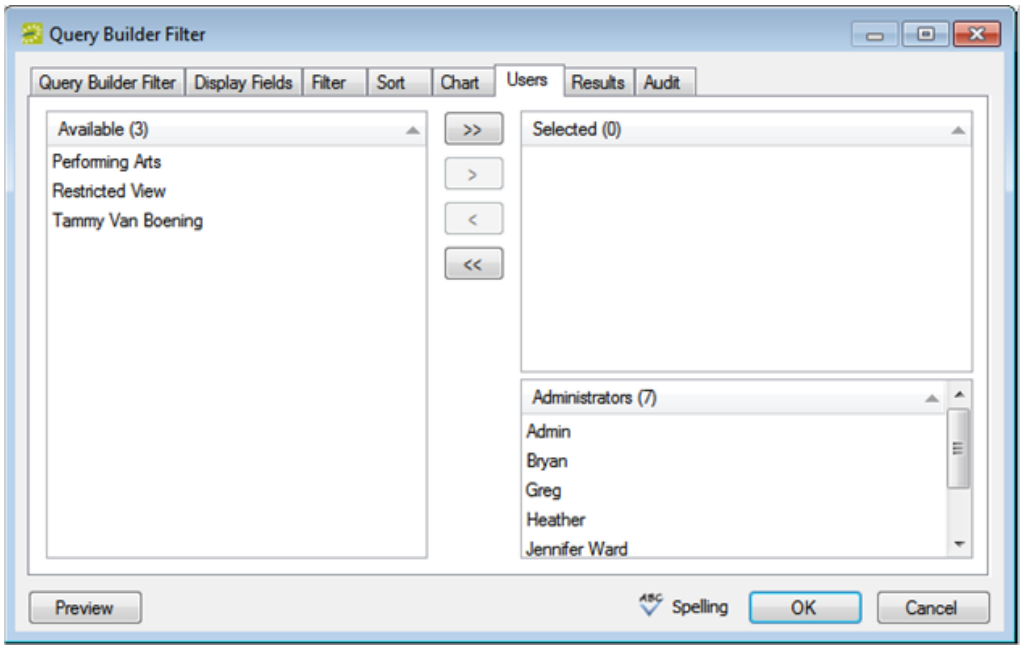
Chart Tab



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

> **Note:**
> The ability to assign specific queries to specific users is available only in EMS Enterprise. It is not available in EMS Professional.



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.

> **Note:**
> 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. Additionally, if a user is assigned to a User Template, this template controls which queries they have access to here.

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.

Edit a Query

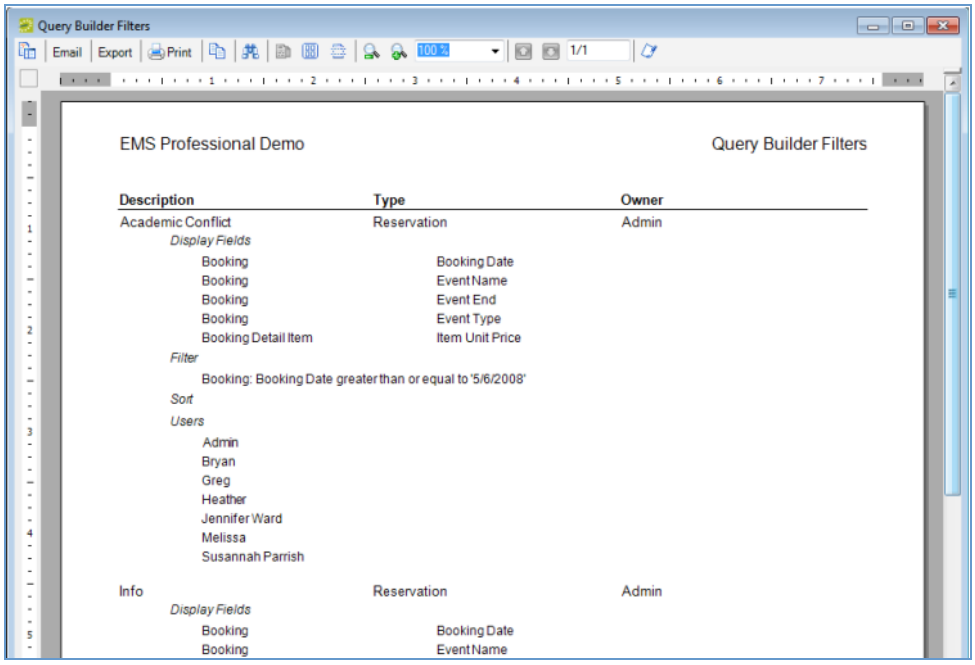
1. On the EMS menu bar, click **Reports**. The Reports menu opens.
2. On the Reports menu, click **Queries** > **Query Builder**. The Query Definitions dialog box opens. The dialog box displays, by name, any queries that have been previously defined in your EMS application.
3. Select the query that you 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.

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.
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.

View and Print a Query's Filters

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.
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.



Print Preview for a Query

4. Select the option or options that best fit your working needs.

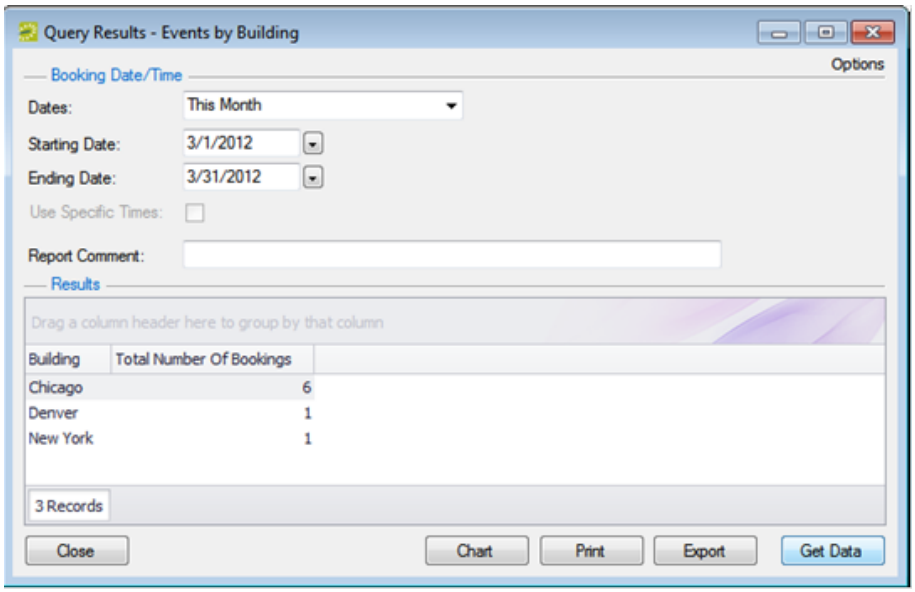
Run a Query

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.

> **Note:**
> The Results (lower) pane on the Query Results dialog box is an EMS browser window. See EMS Browser Window for all the features that are available for this pane.



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 Time**s, and then enter a starting time and ending time to query the data 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 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.

> **Note:**
> 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.

CHAPTER 274: 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.

The following topics provide more information about billing in EMS Desktop Client:

- Overview of Billing in EMS Desktop Client
- Search for Transactions
- Quick Reference Guide: Billing and Invoicing
- Work with Invoices
- Types of Transactions
- Work with Transactions
- EMS Billing Reports
- Apply a Reservation Discount
- Bill Multiple Reference and PO Numbers for a Reservation
- Price Categories and Room Charges

CHAPTER 275: Overview of Billing in EMS

Billing in EMS is a two-step process:

1. Generate Invoices
   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.

2. Process Received Payments
   You can use the Payment Entry function to enter deposits made against a reservation before invoicing or booking and to enter adjustments.

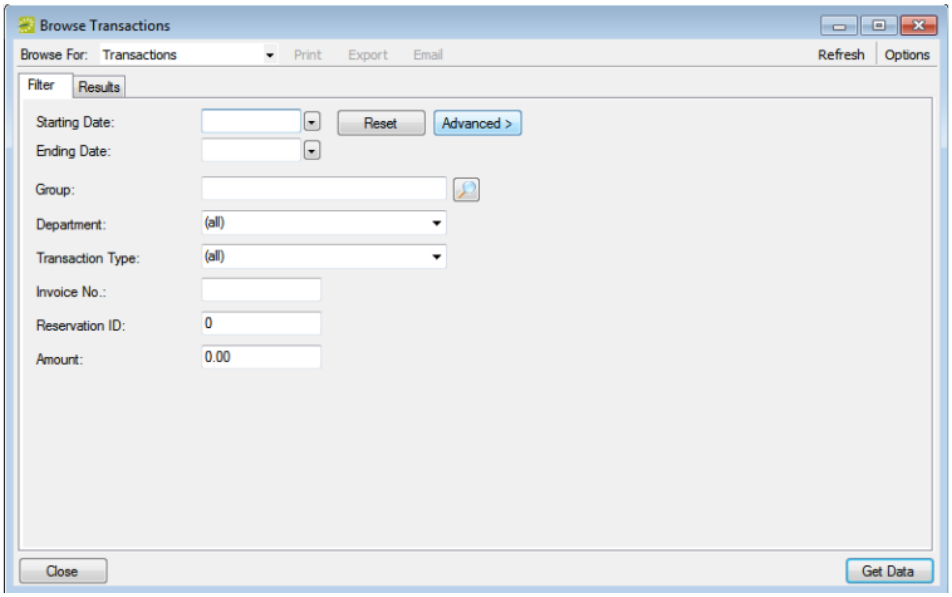
> **Note:**
> As part of this process, you can generate the Billing Worksheet report. (See Generating an EMS Billing Report.) You use this report to review the dollar amounts for the bookings for which you intend to create invoices. You can correct any discrepancies that you note in the report by editing the bookings or booking items in question.

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.

CHAPTER 276: Search for Transactions

You can find all transactions for a reservation on the Transactions tab in the Navigator. The Browse Transactions option, however, enables you to search for any transaction type with or without the reservation number, using a basic or advanced search; search results show in a list view. A basic search calls for 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 goes through more specific field values in reservations, transactions, or both. For example, in an advanced search, you search by the Bill-To Contact at the reservation level.

1. On the EMS menu bar, click Billing > Other > Browse Transactions. The Browse Transactions window opens. The first time the Browse Transaction window opens, the Filter tab uses a basic search; otherwise, it uses the search type (Basic or Advanced) that you last performed.



2. Click the Basic/Advanced toggle button to switch between the search types.

Basic Search

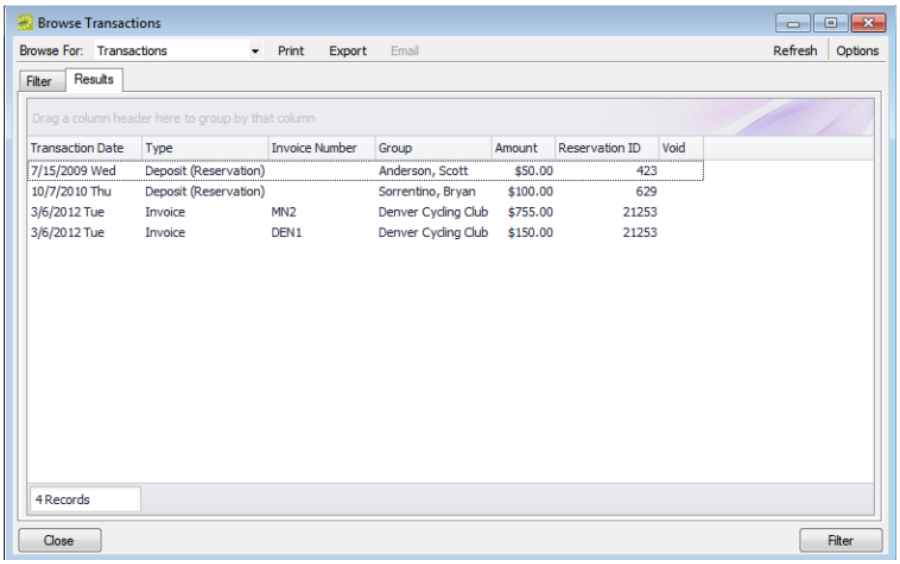
A basic search calls for basic information that you specify for a transaction when you first create it, such as the group to which the transaction applies, the department that generated the transaction, and so on.

1. Enter your search criteria using the table below.

Field	Description
• Starting Time • Ending Time	The date range during which the transactions were carried out. Both are optional.
Group	(Often re-labeled "Employee" or "Customer"). Search  for a person or group for which the transactions apply.
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 1000, 1017, 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

Field	Description
	transaction.

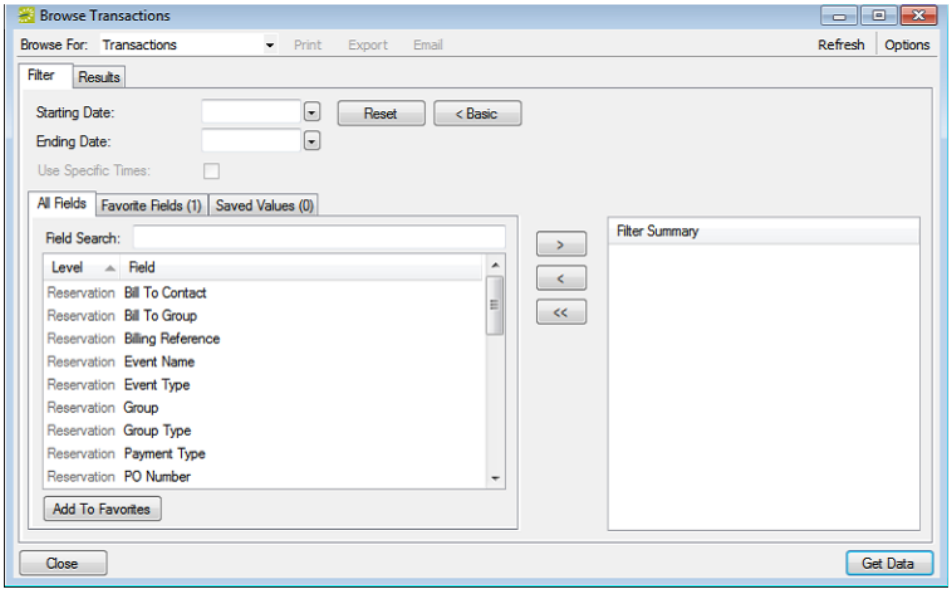
2. You can click Options and specify the Number of Records to Return.
3. Click Get Data or Refresh to see search results.



4. To work with the results, you can do one or more of the following:
   - Click Print to print the search results.
   - Click Export to export the search results to a Microsoft Excel spreadsheet.
   - Select 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 Also: Sending Email.
   - Click Filter to return to the Filter tab, make any necessary changes to the search criteria, and then repeat the search.
   - Click Refresh to re-query 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. You can also Reset the columns to their default values.

Advanced Search

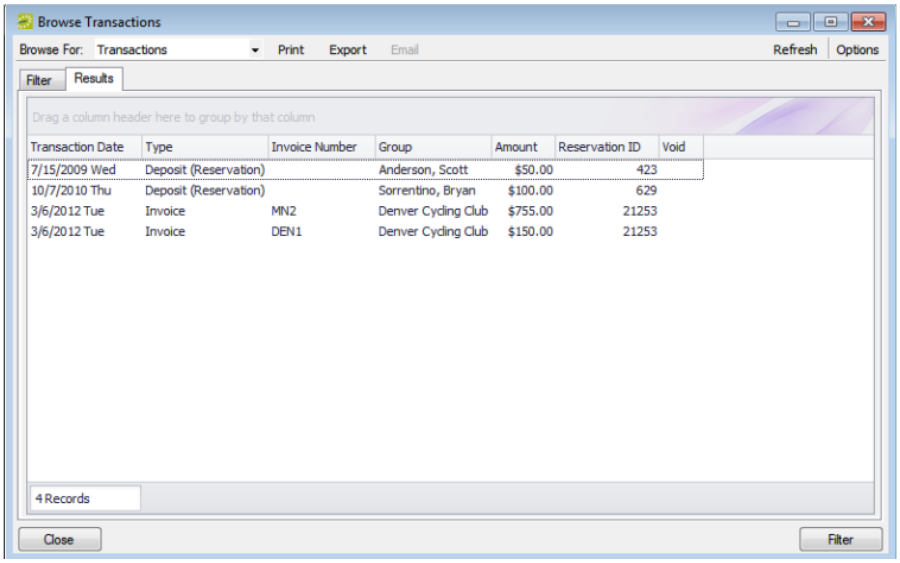
An advanced search goes through more specific field values in reservations, transactions, or both. For example, in an advanced search, you search by the Bill-To Contact at the reservation level. Toggling to an Advanced search refreshes the Browse Transactions window with additional options.



1. You can enter a Starting Date, an Ending Date, or both, to set a date range for the search. If these dates are the same, you can select Use Specific Times and enter specific time periods to search.
2. Select fields you want to specifically search and use the arrow button to move each to the right pane.

> **Note:**
> You can use the Field Search field to filter the list of available fields by keyword.
>
> If you want to use specific fields and/or values often in this kind of search, use Add To Favorites. 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 perform a search, you can open the Favorite Fields tab or the Saved Values tab to re-use these favorite fields and pre-set values.
>
> To see details about a field, you can mouseover the field in the Filter Summary list.

3. When prompted, enter a value or define the limits for the field, and then click OK.
4. You can, click Options and set values for additional search options: Date/Time Filter, Number of Records to Return, and Specific Room Filters.
5. Click Get Data or Refresh to see search results.



6. You can work with the search results just as you would for the Basic Search (above).
7. Click Close.

CHAPTER 277: Quick Reference Guide: Billing and Invoicing

This quick reference gets you going with billing and invoicing in EMS Desktop Client:

- Run the Billing Worksheet to Review Charges
- Edit Charges on Reservations
- Invoice Reservations in Batch
- Run the General Ledger Distribution Report by Invoice
- Apply Payments in Batch
- Void Payments and Invoices
- Additional Billing Reports

Run the Billing Worksheet to Review Charges

- Once a billing cycle is complete, run the Billing Worksheet to review reservations with charges assigned that have not been invoiced yet.
- Go to Billing > Invoices > Billing Worksheet > Select the Previous Billing Cycle > Print Preview

Edit Charges on Reservations

- If a reservation on the billing worksheet needs to be modified, use the Reservation ID from the billing worksheet to open the reservation.
- Add or edit billable items like resources as needed.
- In the navigator screen, you will see the prices in the booking details pane. Edit the booking detail to manually change the price as needed.
- To change the prices to another pricing plan, go to the Reservation level > click Update Pricing
  Then choose a New Pricing Plan, select the appropriate category, then click Next. Select all Applicable Bookings, then click Finish.

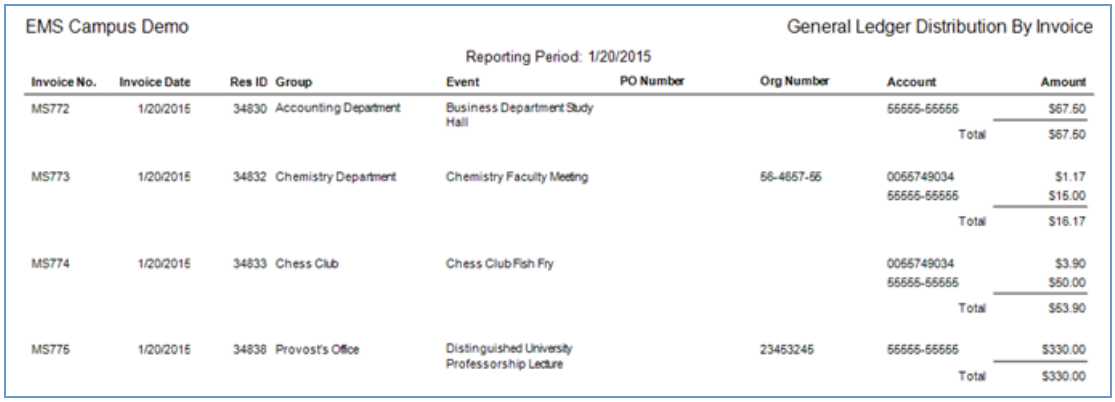
Invoice Reservations in Batch

- Once charges on reservations are corrected, invoice in batch.
- Go to Billing > Invoices > Invoicing
- Select the same Dates and other filter criteria used on the Billing Worksheet.
- Click Generate
- Highlight the transactions you want to invoice (all or some), click Preview to review, then click Final – click Yes to warning about posting and printing x number of invoices

- The invoices display. Close the preview.

Run the General Ledger Distribution Report by Invoice

- Next run the general ledger distribution report by invoice to see all of the journal entries that need to be made for the billing period. The report includes the Billing Reference Number to charge, the accounts to credit, and the amount due.
- Go to Billing > Reports > General Ledger Distribution
- The first time you run this report, make the following selections and then click Memorize to save the report for future use.
  - Date Range Tab:
    - Department - will default to the department you work in and are assigned to.
    - First Transaction Date and Last Transaction Date – select the date the batch invoices were created
    - Group – (all)
    - Format – By Invoice
  - Group Types Tab:
    - Move all group types that you invoice from the Available to the Selected column
  - Options Tab:
    - Currency: US Dollars
    - Invoices with Payments Only: unchecked
    - Show Applied Deposits/Pre-payments: unchecked
- After the report has been saved, click Print Preview.
- Optionally, use this report to make journal entries in your financial system. The Billing Reference Numbers represents the account to be debited, the Account represents the revenue account to be credited.



EMS Campus Demo — General Ledger Distribution By Invoice

Reporting Period: 1/20/2015

Invoice No.	Invoice Date	Res ID	Group	Event	PO Number	Org Number	Account	Amount
MS772	1/20/2015	34830	Accounting Department	Business Department Study Hall			55555-55555	$67.50
							Total	$67.50
MS773	1/20/2015	34832	Chemistry Department	Chemistry Faculty Meeting		56-4657-56	0056749034	$1.17
							55555-55555	$15.00
							Total	$16.17
MS774	1/20/2015	34833	Chess Club	Chess Club Fish Fry			0056749034	$3.90
							55555-55555	$60.00
							Total	$63.90
MS775	1/20/2015	34838	Provost's Office	Distinguished University Professorship Lecture		23453245	55555-55555	$330.00
							Total	$330.00

Apply Payments in Batch

- Optionally, apply payments in EMS to represent that the journal entry was made to pay for the charges. Go to Billing > Payments > Payment Entry.
- The Payment Entries window will open. Click New.
- The Payment Entry window will open. Make the following selections:
  - Transaction Type – Payment
  - Payment Type – Internal Transfer
  - Check No. – optionally enter the journal entry transaction number
  - Amount – enter the total amount paid for the invoice
  - Invoice No. – type the invoice number found on the General Ledger Report
  - Notes – Optionally, enter other information you would like to track about this payment. Click OK to save.

Void Payments and Invoices

- If a correction to an invoice is needed, you must void the most recent transaction(s) on an invoice before you can void the Invoice itself. For example, payments applied to an invoice must be voided first.
- On the Transactions Tab, select payment > Void > enter Void Reason > OK (this action does not delete the payment, it voids it and displays void date & comment)
- To void an Invoice, select invoice > Void> enter Void Reason > OK
- Transactions become locked after a certain number of days. The number of days are configured on the Department are represent the number of days you are allowed to void an invoice. If it is 365, for example, you must void invoices within one year of creating that invoice. After one year, you would not be able to void the invoice.

Additional Billing Reports

Statements

- Allows you to create a customer facing statements (across all invoices) of the original amount due on an invoice and remaining balance.
  - Billing > Reports > Statements

Ageing Report

- Used to show who owes a payment and if they are current, 30 days, 60 days, or 90 days late.
    - Billing > Reports > Ageing Report

Billing Queries

- If you need a billing report that doesn't already exist in EMS, build a query. Use billing as a filter type. When billing is selected as the filter type, transaction fields become available as filters and display fields.
    - Reports > Queries > Query Builder

CHAPTER 278: Work with Invoices

You can generate an invoice in EMS Desktop Client 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.

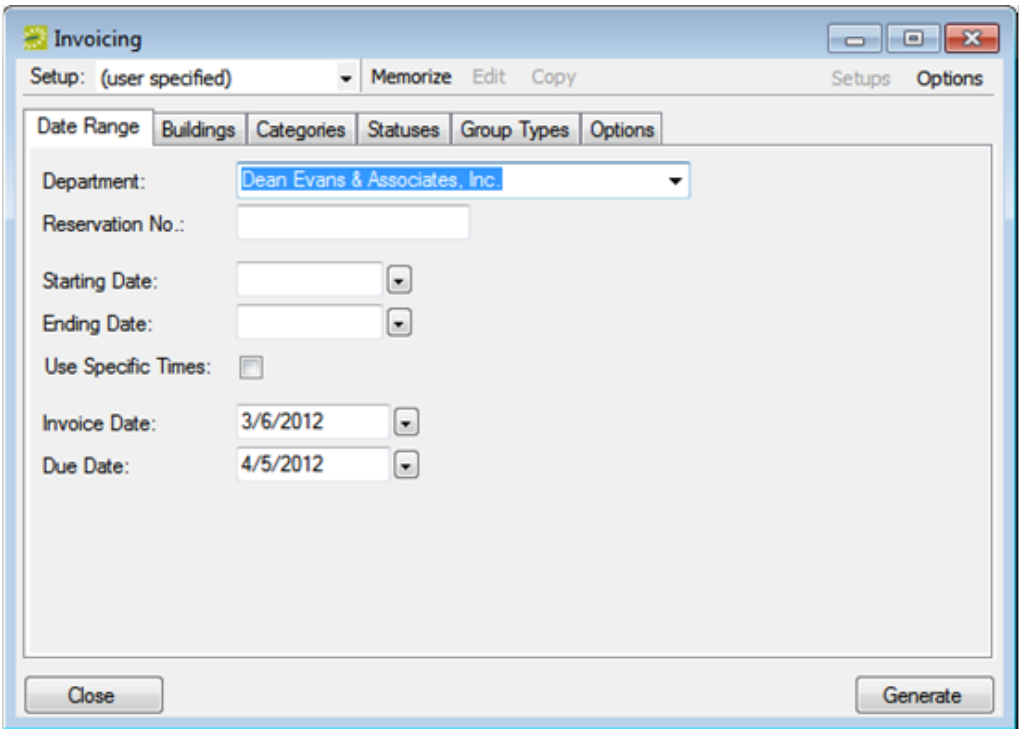
You can work with invoices for a single reservation, or you can batch process multiple invoices. If you want to work with invoices for a single reservation, you do so through the Transactions tab in the Navigator. If you want to work with a batch of invoices, you do so through the EMS Desktop Client Billing menu: **Billing** > **Invoices** > **Invoicing**.

Generate an Invoice

Note:

Before you generate an invoice, you should generate the Billing Worksheet report.
See Generate an EMS Billing Report.

1. Do one of the following:
   - Open the reservation in the Navigator and on the **Transactions** tab, click **New** > **Invoice**.
   - On the EMS Desktop Client menu bar, click **Billing** > **Invoices** > **Invoicing**. The Invoicing window opens.



Note:
On the Setup drop-down list, you can 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.

2. Review and make changes as needed, using the table below.

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.

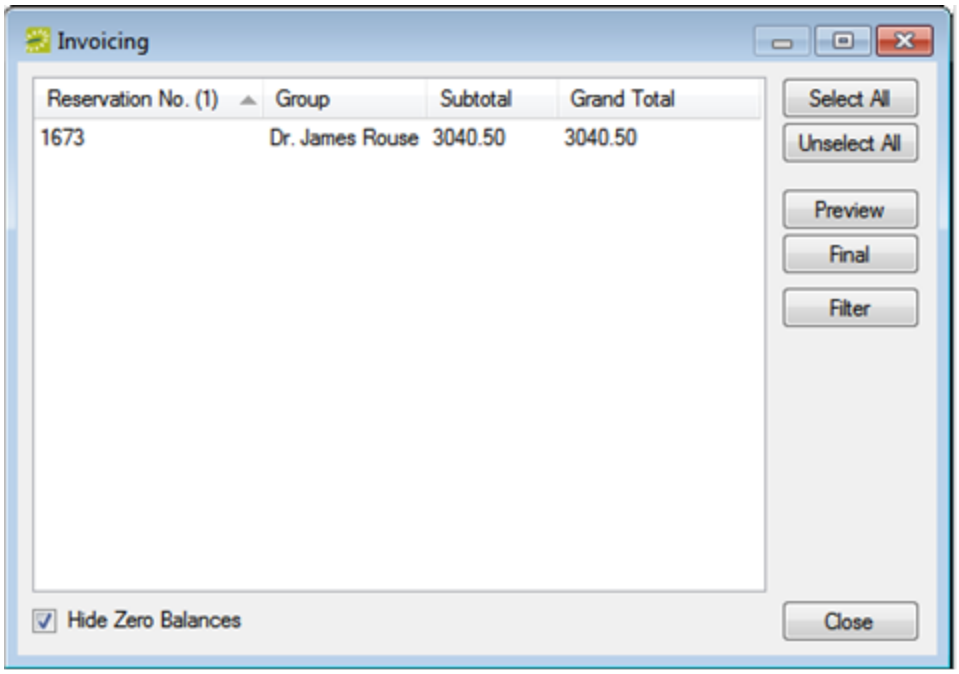
Field	Description
Reservation Number	Automatically populated if you are generating an invoice from the Transaction tab; otherwise, enter a reservation number.
Starting Date Ending Date	Automatically populated with the first (starting) booking date and the last (ending) booking date for the selected reservation 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), 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 default value is 30 days from the current day's date. (Your 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. 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.	
Note: You can click the **Show Inactive** option for both categories and statuses, to show inactive categories and statuses, so you can select these inactive items as part of your filtering criteria.	
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

Field	Description
	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.
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

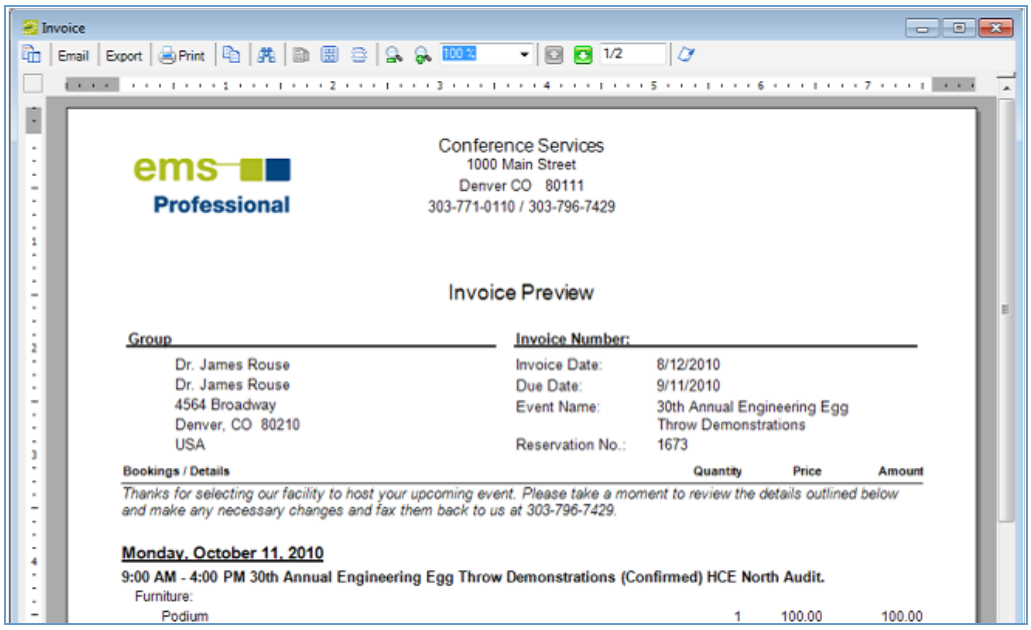
Field	Description
	option to display the HTML version of these messages in the printed invoice; otherwise, the message is displayed in plain text.

Note:
If needed, you can always save these settings. See Work with Saved Reports.

3. Click **Generate**. The generated invoices are displayed in the Invoicing dialog box. By default, invoices with a zero balance are not shown.

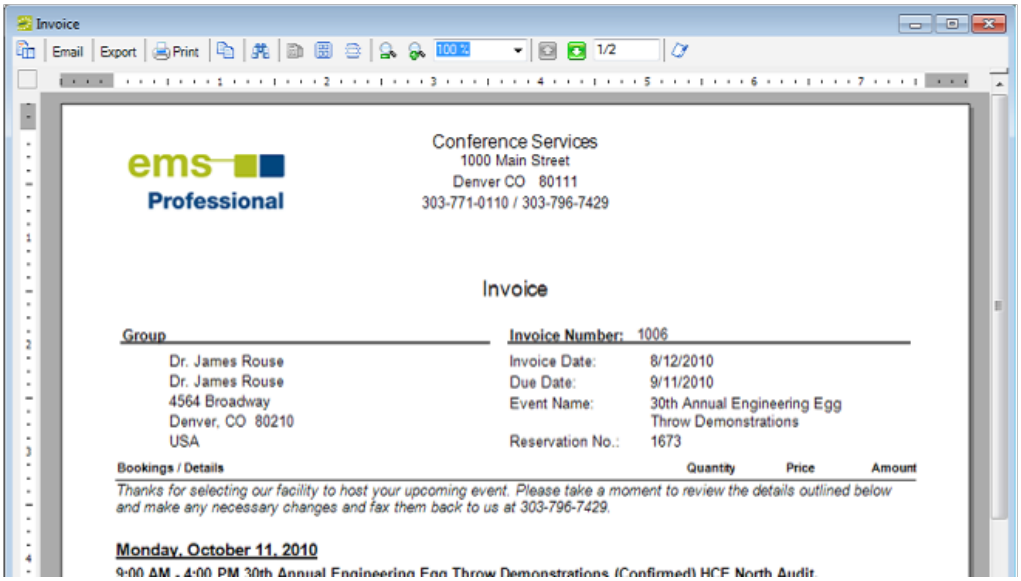


4. Optionally, you can do one or more of the following to work with the invoices that are displayed; otherwise, if you are satisfied with the invoices, you can go to the next step to post the invoice.
   - To show zero balance invoices in the window, clear the Hide Zero Balances option.
   - To preview an invoice, select the invoice (CTRL-click to select multiple invoices), and then click Preview. An onscreen preview of the selected invoices opens, titled “Invoice Preview” (to distinguish the invoices from those 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 Send Email from EMS), 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.



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 Send Email from EMS), and so on. Select the option or options that best fit your working needs.



Onscreen preview of a posted invoice

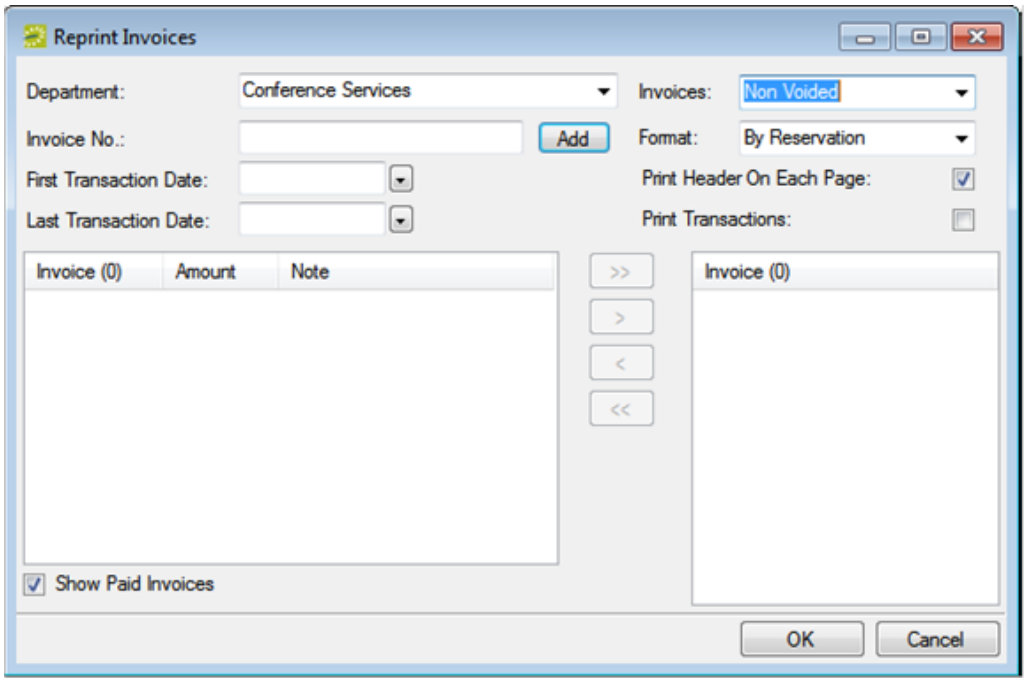
After you generate and post an invoice, the message “Items have been invoiced” is displayed in red text on the Reservation Summary tab, the Booking Summary tab, and the <Booking Detail> Summary tab in the Navigator. The booking detail folder in which the invoiced items reside now has a green background 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.)

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.

1. On the EMS Desktop Client menu bar, click Billing > Other > Reprint Invoices. The Reprint Invoices dialog box opens.



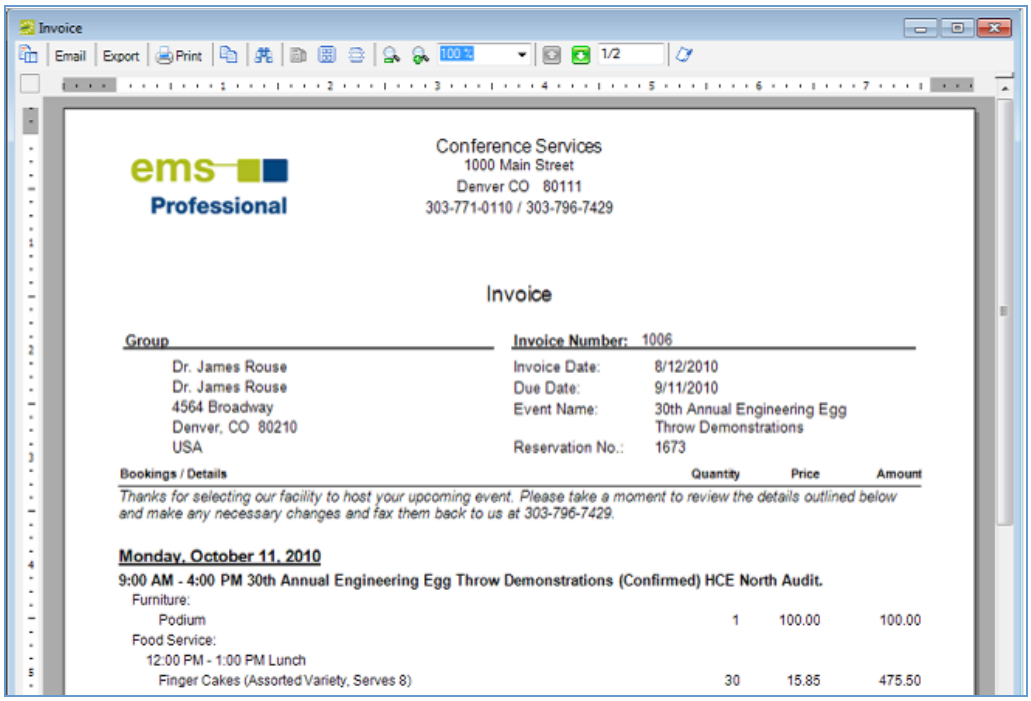
Reprint Invoices dialog box

2. 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 want to reprint, 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 want to reprint.
5. Leave the reprinting criteria set to their default values, or change them as needed using the table below.

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.

Option	Description
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 Send Email from EMS) and so on. Select the option or options that best fits your working needs.

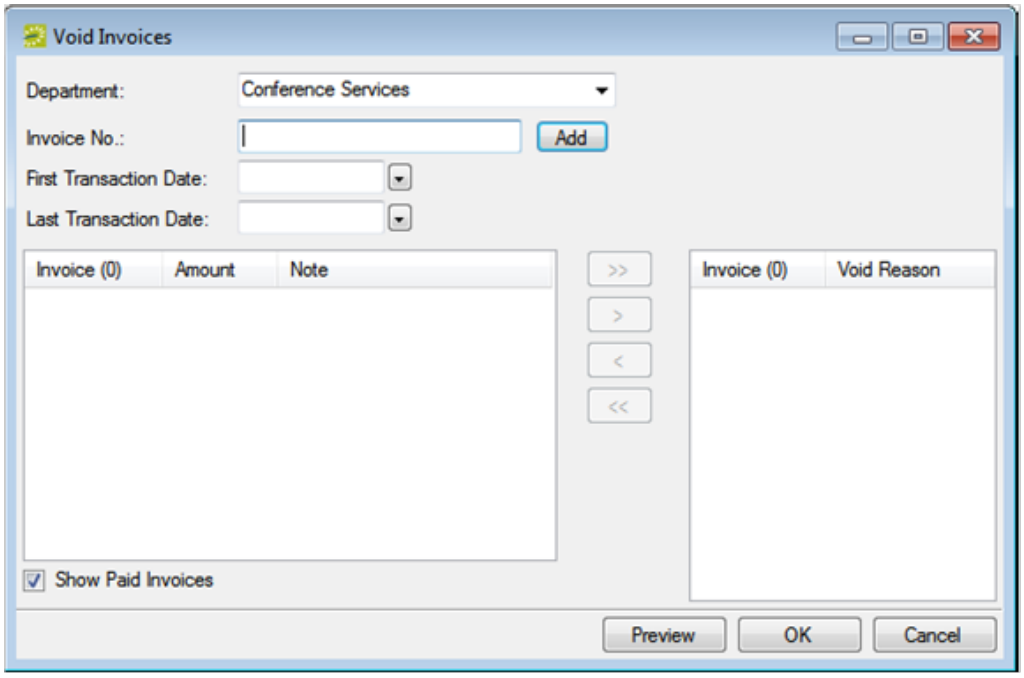


Void an Invoice

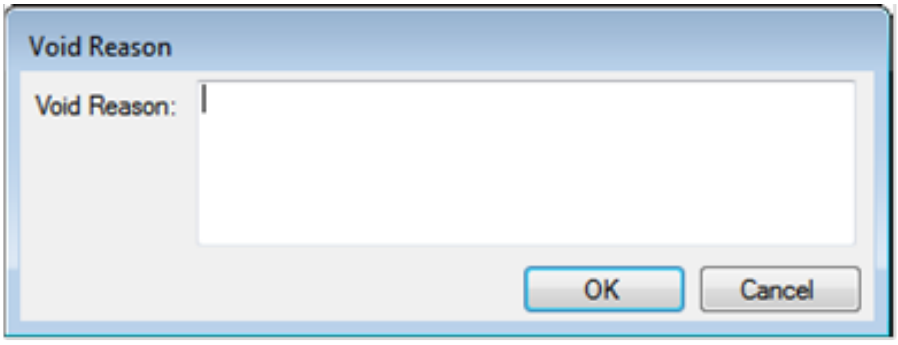
You can void an invoice only if the invoice has not been paid. If payments have been made against an invoice, you must first void the payments. You can void invoices for only one department at a time. When you void an invoice, the invoice is removed from the Ageing report and its associated bookings are unlocked. You can specify invoices to void, or you can search for invoices that meet specific criteria, and then select specific invoices to void from the list of search results.

> **Note:**
> You can also void an invoice from the **Transactions** tab when a reservation is selected in the Navigator.

1. On the EMS menu bar, click **Billing** > **Other** > **Void Invoices**. The Void Invoices dialog box opens.

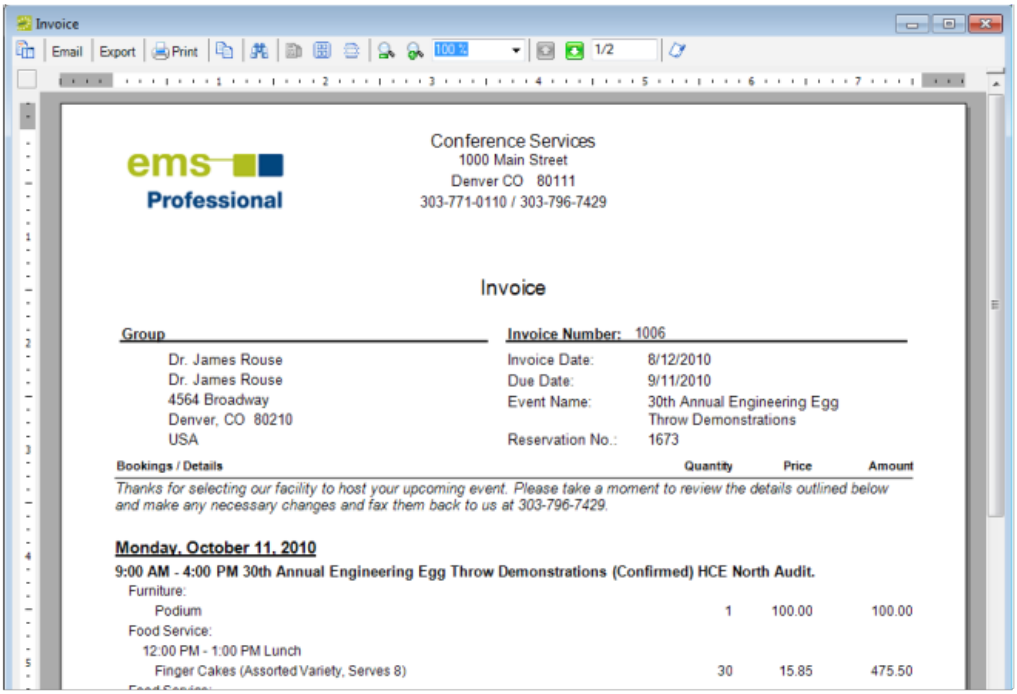


2. In the Department field, select the department that generated the invoices.
3. In the Invoice No. field, enter the number of the invoice that you are voiding, and then click **Add**. Two results are possible:
   - If payments have not been applied to the invoice, then a Void Reason dialog box opens. Continue to Step 4.



- 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 Void a transaction.

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. 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.



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.

Concept: Calculations are additional charges that can be applied to billable items based on an associated group or individual, a category or service, 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. If a event has associated calculations (which are assigned to groups or individuals, categories and services, and rooms), you will see these in the invoicing process.

CHAPTER 279: Types of Transactions

A transaction in EMS can be any of the following types:

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.

CHAPTER 280: Work with Transaction

Working with transactions includes entering and voiding:

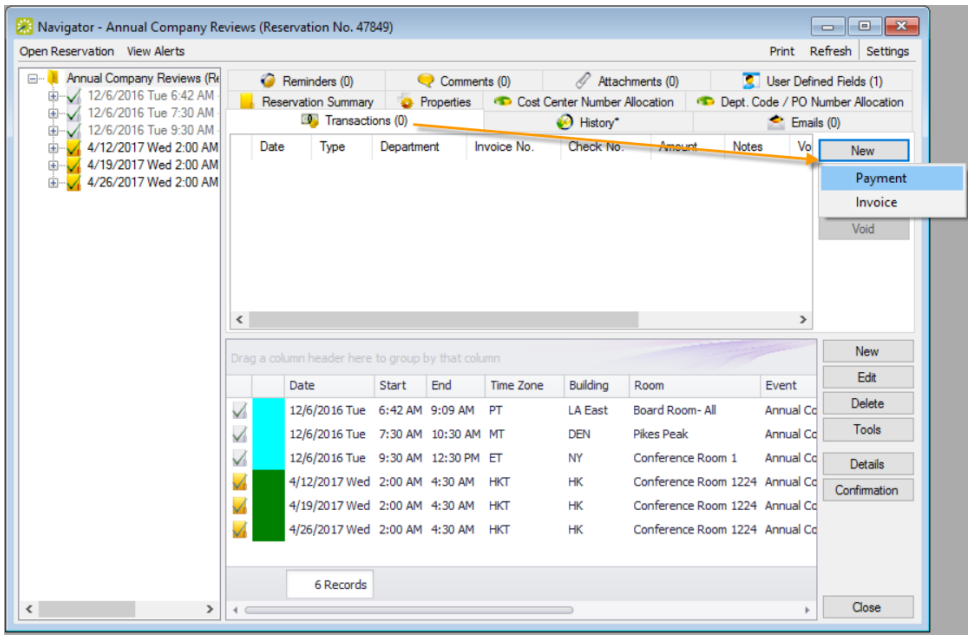
- Adjustments.
- Deposits (Damage, Booking, Reservation).
- Payments
- Pre-Payments.
- Refunds.

Each type of transaction involves unique steps for entering them, but the task of voiding all these types of transactions are the same.

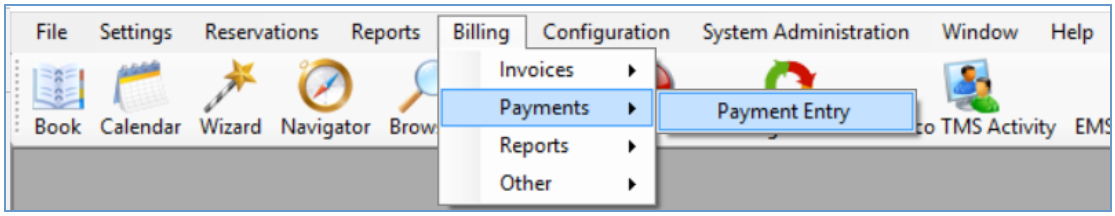
> **Note:**
> You might need to first search for an existing transaction to determine if it has already been entered or voided.

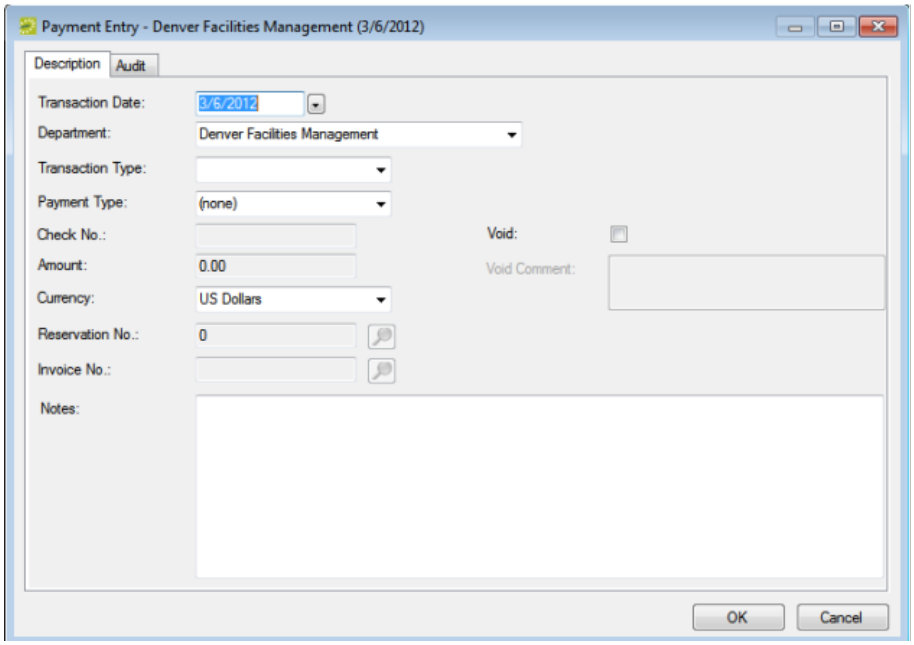
Enter a Transaction: Adjustments, Deposits, Payments, Pre-Payments, Refunds

1. Do one of the following:
   - Open the reservation in the Navigator and on the Transactions tab, click New > Payment. (This method pre-populates many fields with information for the reservation).



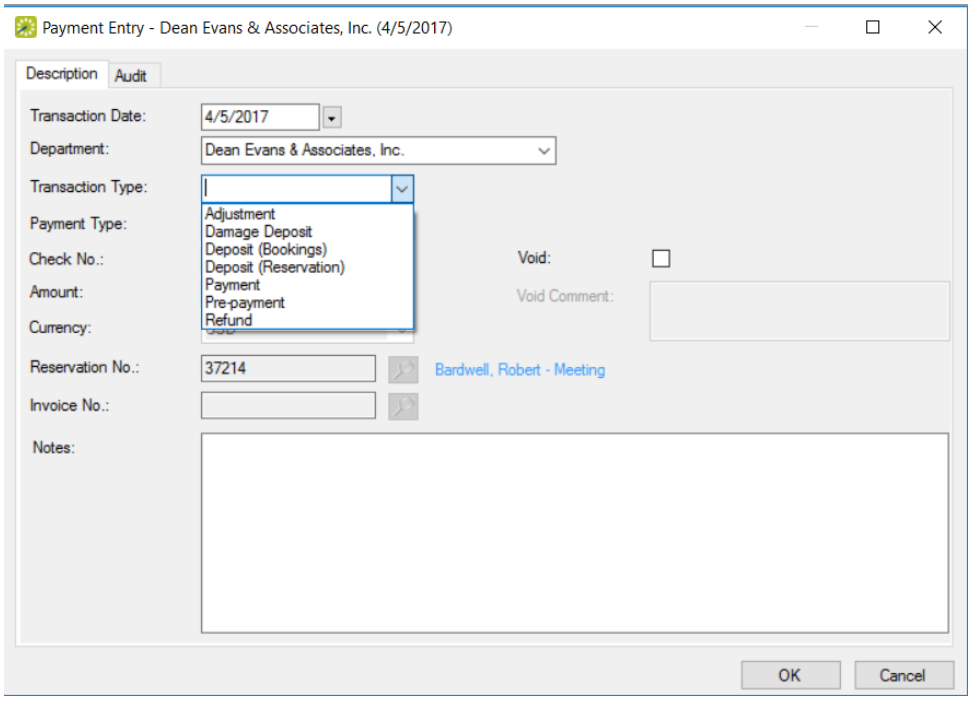
- On the EMS Desktop Client menu bar, click Billing > Payments > Payment Entry, and then on the Payment Entries window, click New. (This method launches a blank Payment Entry form you must complete "from scratch").





Payment Entry Window

2. Select a Transaction Type: Adjustment, Damage Deposit, Deposit (Bookings), Deposit (Reservation), Payment, Pre-payment, Refund. Your selection in this field affects your entries in other fields in this form.



Transaction Type Field, Payment Entry Window

Types of Transactions (select type in Transaction Type field of Payment Entry Window)

Transaction Type	Description
Adjustment	A price adjustment for the event, such as a discount or late charge.
Damage Deposit	A refundable amount to cover possible damages during the event.
Deposit (Reservation)	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.
Deposit (Bookings)	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.

Transaction Type	Description
Payment or Pre-payment	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.
Refund	Funds reimbursed to the payee.

Note:
You can also void an existing transaction from this window by clicking the Void option. For detailed instructions, see Void Transactions (below).

3. Enter additional information using the table below.

Field Descriptions for Payment Entry Window

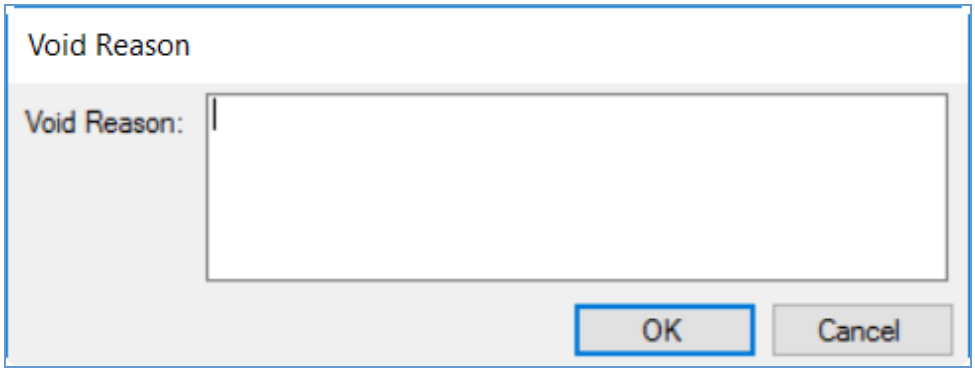
Field	Description
Transaction Date	The default value is the current day's date. You can edit this value if needed.
Department	Select the department.
Payment Type	Select the payment type.
Check No.	Enter a check number if you selected "Check" as the payment Type.
Amount	Enter the amount of the transaction. To decrease the invoice by this amount, enter a minus sign (-) before or after the amount.
Currency	Select the currency for the transaction.
Reservation No.	Automatically populated if you opened this window from the Transaction tab in the Navigator; otherwise, enter a reservation number or Search for a reservation. Adjustments, Payments, Refunds: This field is not available for these transaction types since they are applied to invoices, not reservations.
Invoice No.	When required, Search for an invoice (with a specific date and Employee or Customer name from the Department you specified) to associate with this

Field	Description
	transaction . Deposits, Pre-payments: This field is not required for deposits and pre-payments since they 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. See Also: Work with Invoices.
Notes	Optional. Enter any other comments or statements that explain or clarify the transaction.

4. Click **OK**. The Payment Entry dialog box closes. The transaction information is displayed on the Transactions tab for the reservation.

Void a Transaction

1. Open the reservation in the Navigator and on the Transactions tab, select the transaction you want to void (CTRL-click to select multiple transactions), and then click **Void**. A Void Reason dialog box opens.



Void Reason Dialog Box

Note:
You can also void a transaction by opening it in Edit mode from the Transactions tab or by locating the transaction by date under the **Billing** > **Payments** > **Payment Entry** option in the EMS Desktop Client menu bar. On the Payment Entry window that displays, select the **Void** option.

2. Enter the reason for voiding the transactions, and then click **OK**.
3. The Void Reason dialog box closes and a message confirms that the transaction has been voided. Click **OK** to return to the Navigator. The Void column is set to **Yes** for each of the voided transactions in the Navigator.

CHAPTER 281: Generate 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 saved settings. (For detailed information about a saved report, see Work with Saved Reports.) 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.

> **Note:**
> 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. Contact your EMS administrator if you need assistance in generating any of these report.

Generate a Billing Report

To generate an EMS billing report, follow these steps:

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**.

> **Note:**
> All Billing reports other than the Billing Worksheet report are also available from **Reports** > **Billing**.

2. On the Setup drop-down 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, select the saved report, and then go to Step 4.

> **Note:**
> For detailed information about saved reports, see Work with Saved Reports.

3. Specify the report parameters, options, and format. See:
   - Invoice Reports
   - General Reports
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 save the report. See Work with Saved Reports.

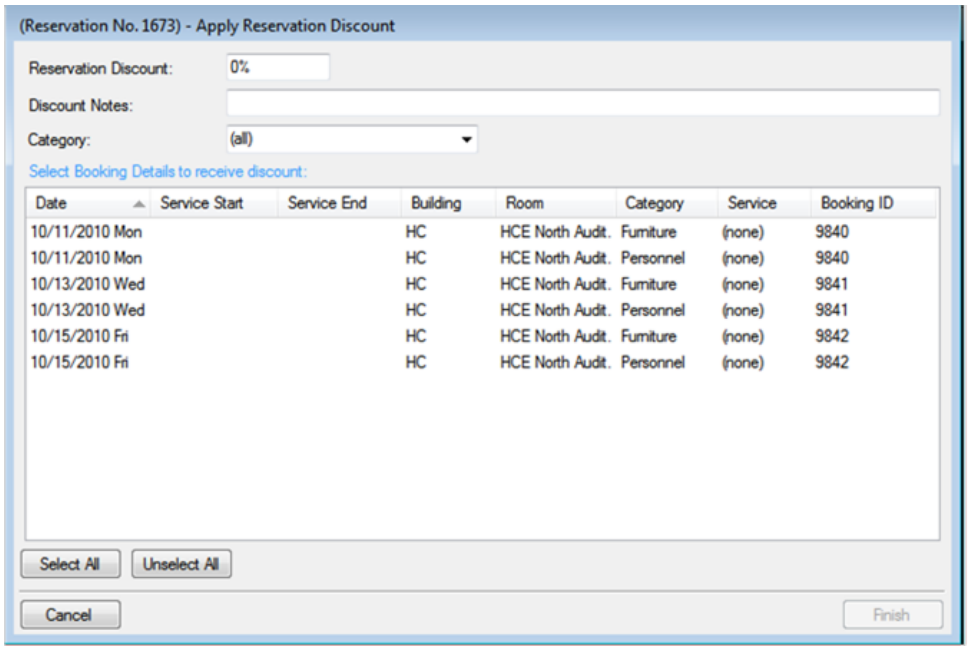
CHAPTER 282: Apply a Reservation Discount

You use the 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.

Note:

To apply a discount to invoiced items, you must first void the invoice. See Void an invoice.

1. Open the reservation in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
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.



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 drop-down list, select a category. The Apply Reservation Discount window is updated with the bookings that have the selected category.

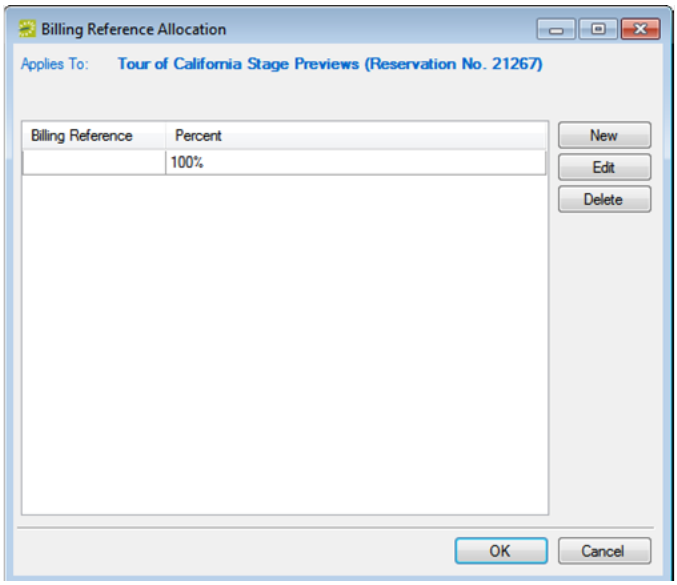
5. Enter the discount percentage.
6. Optionally, enter any notes that are relevant about the discount.
7. Select the booking, or CTRL-click to select the multiple bookings to which you are applying the discount, or click **Select All** to select all the displayed bookings in a single step, and then click **Finish**. A message appears 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 Edit a Reservation in the Navigator.

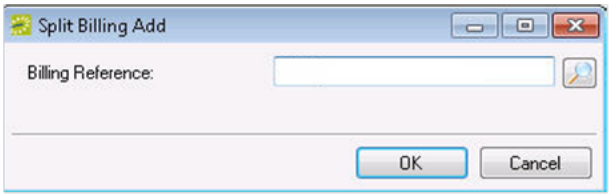
CHAPTER 283: Bill Multiple Reference and PO Numbers for a Reservation

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.



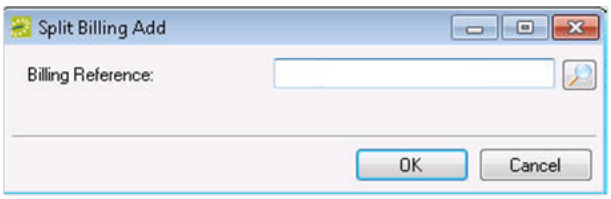
2. Select the billing reference number placeholder, and then click Edit. The Split Billing Add dialog box opens.



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%.

- Search for a billing reference: click the Search icon and select a billing reference number from the list, or, enter a search string in the Find field to choose from a list of close matches. 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. You return to the Billing Reference Allocation dialog box with the selected billing reference number allocated at 100%.

4. 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, click New. The Split Billing Add dialog box opens.



5. Do one of the following:
6. Enter a Billing Reference number, and then click OK.
7. Search for a number by selecting from the list or by keyword, and then click OK.

   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 these steps 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 on the Navigator. All the billing reference numbers and their percent allocations are displayed on the tab.

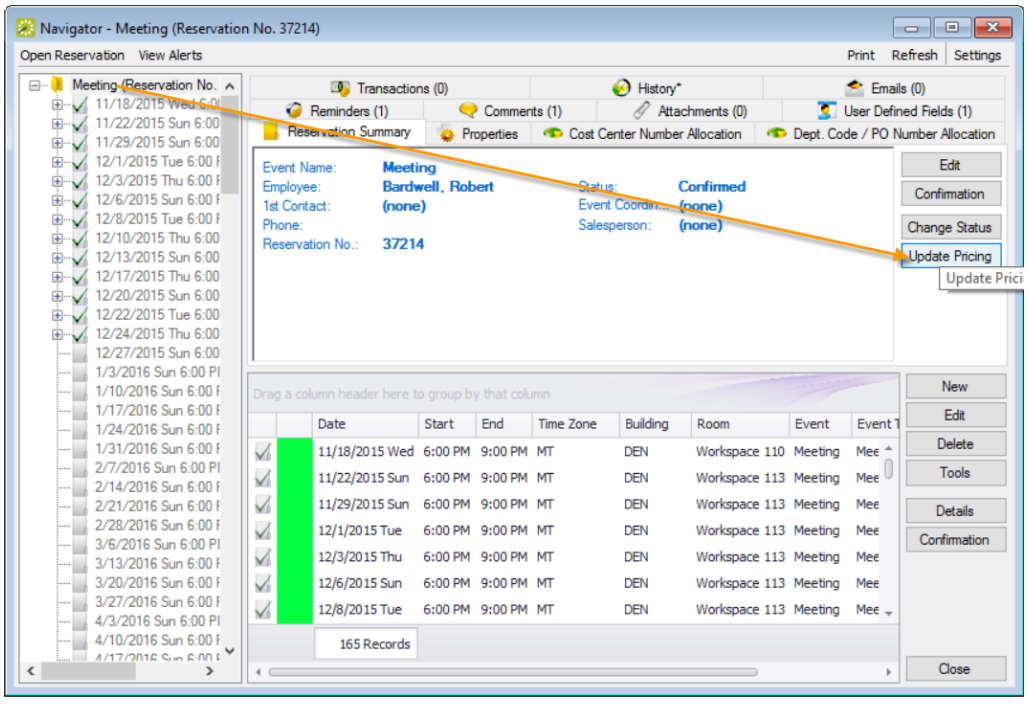
CHAPTER 284: Reprice Categories and Room Charges for a Reservation

When you edit a reservation, changes to the pricing plan are applied at the reservation-level only. Booking level service categories and room charges are not automatically repriced. To reprice services or room charges based on a new pricing plan, use the Update Pricing Plan Wizard shown here.

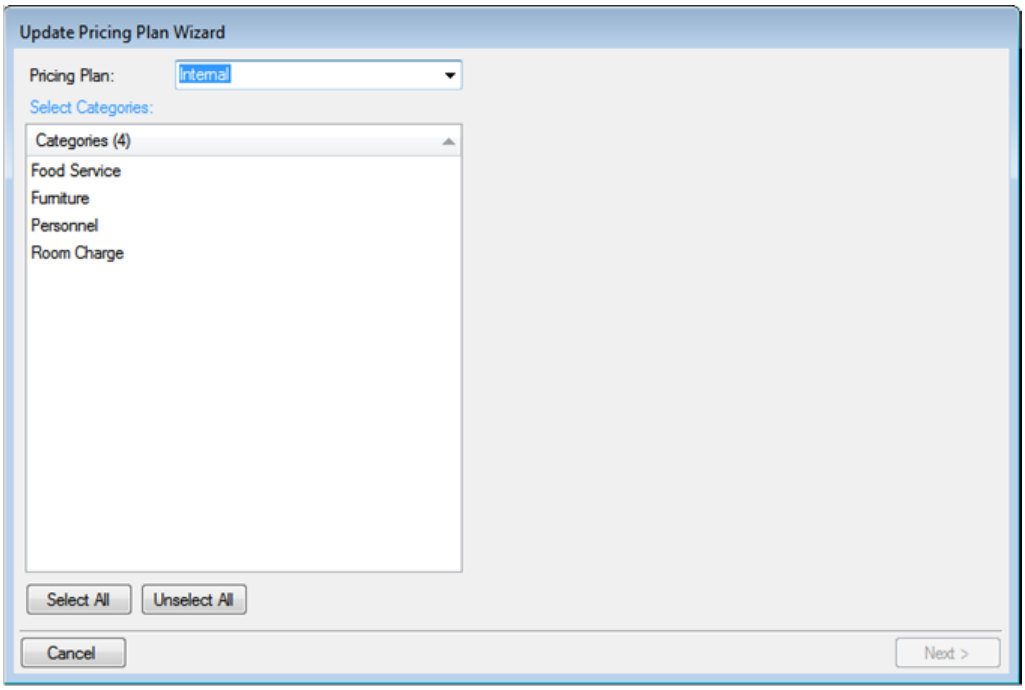
> **Note:**
> You can reprice a room charge for a booking only if the room charge has not been invoiced. To reprice a room charge that has been invoiced, you must first void the invoice.

Additionally, you can also Edit Charges for Multiple Billable Items.

1. Open the parent reservation in the Navigator.
2. In left pane the Navigator, select the reservation or booking with which you want to work, and then on the **Reservation Summary** tab, click **Update Pricing**.



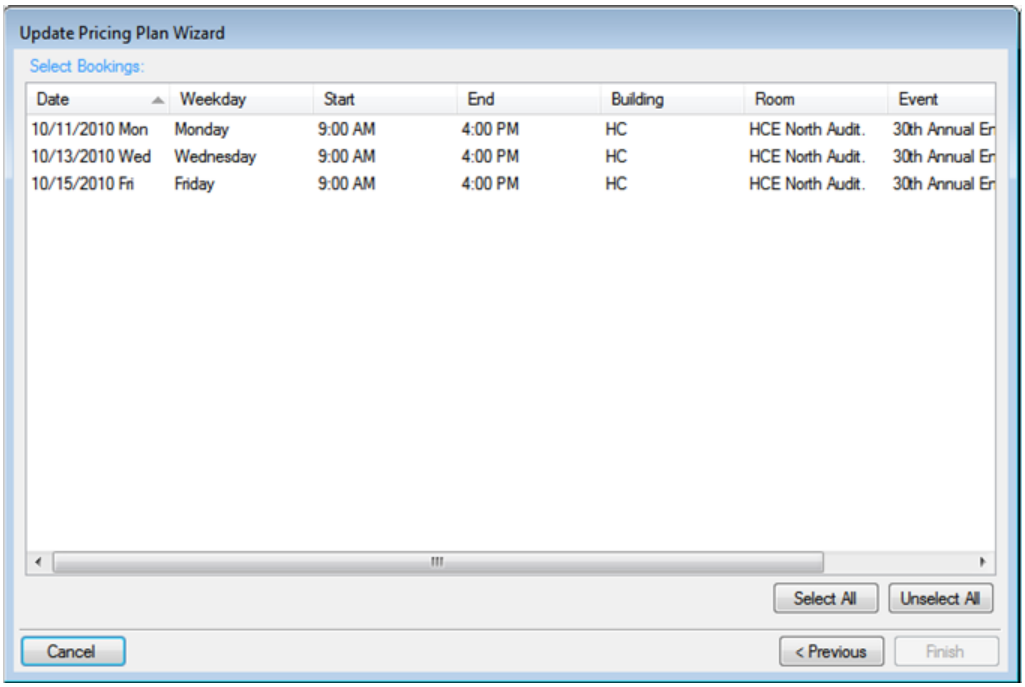
3. The Update Pricing Plan Wizard opens. The current pricing plan for the reservation is displayed in the Pricing Plan field. The window displays all the service categories and room charges that can be repriced in one or more of the reservation bookings.



Note:

If the reservation has other optional Pricing Plans, you can change the list using the drop-down field at the top.

4. Select a service category or room charge (CTRL-click to select multiple items) to reprice and click **Next**.
5. The next window lists all bookings under the reservation that have one or more of the selected service categories or room charges that you can reprice.



6. Select the booking(s) for which you want to apply the repricing (you can click **Select All** to select all the displayed bookings in a single step), and then click **Finish**. A message confirms your changes.
7. Click **OK** to close the message and return to the Navigator.

CHAPTER 285: Confirmations

In EMS, a confirmation is a way to communicate 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 to make sure 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.

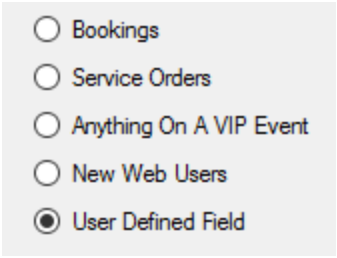
Confirmations are sent automatically to essential stakeholders; notifications trigger based on more granular "notification rules."

Confirmations

- These are either sent out automatically after a booking is made in EMS Web App, or manually from the EMS desktop client.
- They contain the date/time/resources for the booking that was created.
- These usually go to end users so they know when their event is and if they owe any money.

Notifications

- These are sent out automatically based on the filters on the notification rule:
- There are five types of notification rules:



- These are mostly sent out X days before a booking. They are triggered when a change occurs on a booking, service order, and so forth within that range of days.

Additional Information

The following topics provide information about specifying and generating confirmations in EMS Desktop Client:

- Specify Your Confirmation Settings
- Send Confirmations
- Generate a Single Confirmation at a Time
- Generate Printed Confirmations
- Generate Work Merge Documents for Custom Documentation
- Send Emails from EMS
- View History of Sent Emails

CHAPTER 286: Specify 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 you generate, or you can change the settings on as-needed basis and tailor them for each confirmation you generate.

1. Open a reservation in the Navigator. See:
   - Open a reservation directly in the Navigator
   - Open a reservation through the Reservation Book
   - Open a reservation through a group
2. In the upper right corner of the Navigator, click **Settings** > **Confirmation Settings**. The Confirmation Settings dialog box opens.
3. Specify the settings for your system's Confirmations.
4. You can now generate a confirmation (manually or automatically) based on the settings you specified. See Generate a Single Confirmation at a Time.

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.
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.

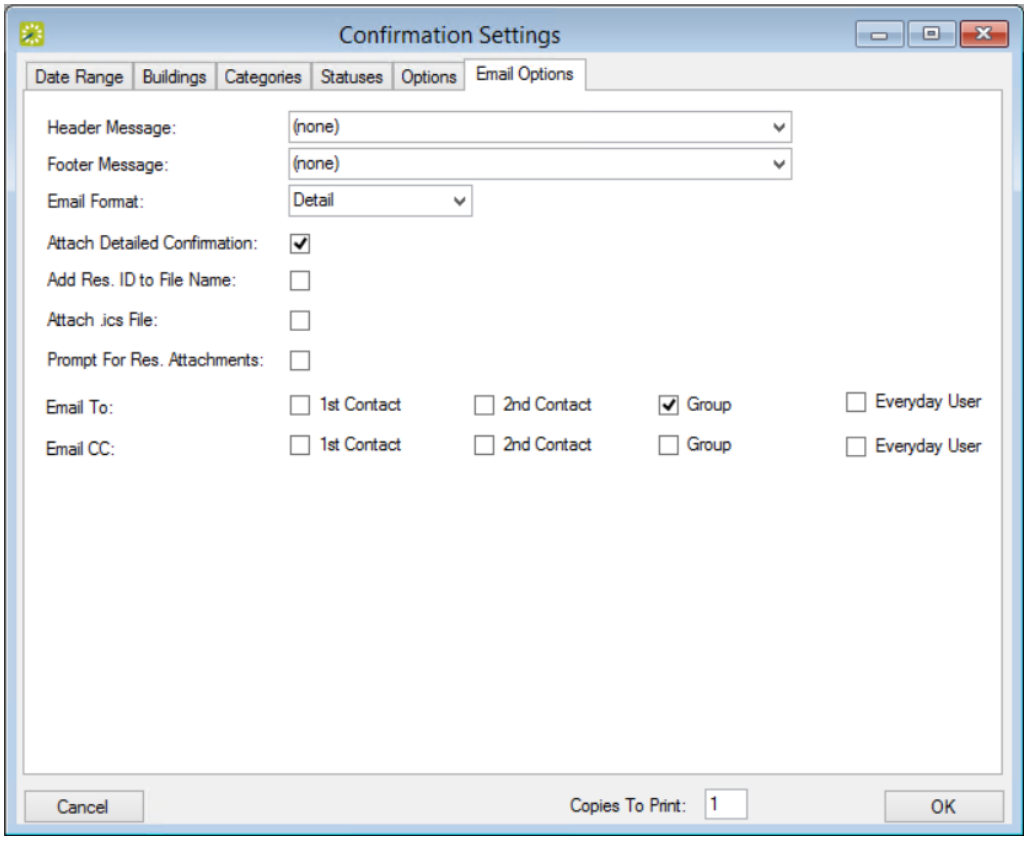
Field	DESCRIPTION
Print Comments	Include the comments for the reservation in the printed confirmation.
Print Reminders	Include the reminders for the reservation in the printed confirmation.
Print Cancel Reasons	Include the reasons for cancellation in the printed confirmation.
Print User Defined Fields	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.

Field	DESCRIPTION
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 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.
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.

Field	DESCRIPTION
	• 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.)

CHAPTER 287: Send Confirmations

1. Open a reservation in the Navigator.
2. In the upper right corner of the Navigator, click Settings > Confirmation Settings. The Confirmation Settings dialog box opens.



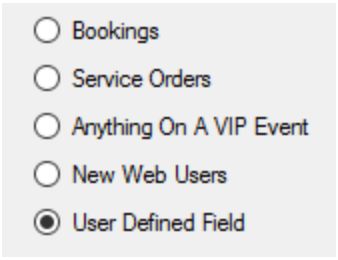
Concept: Confirmations vs. Notifications: What's the Difference?

Confirmations

- These are either sent out automatically after a booking is made in EMS Web App, or manually from the EMS desktop client.
- They contain the date/time/resources for the booking that was created.
- These usually go to end users so they know when their event is and if they owe any money.

Notifications

- These are sent out automatically based on the filters on the notification rule:
- There are five types of notification rules:



- These are mostly sent out X days before a booking. They are triggered when a change occurs on a booking, service order, and so forth within that range of days.

CHAPTER 288: Generate a Single Confirmation at a Time

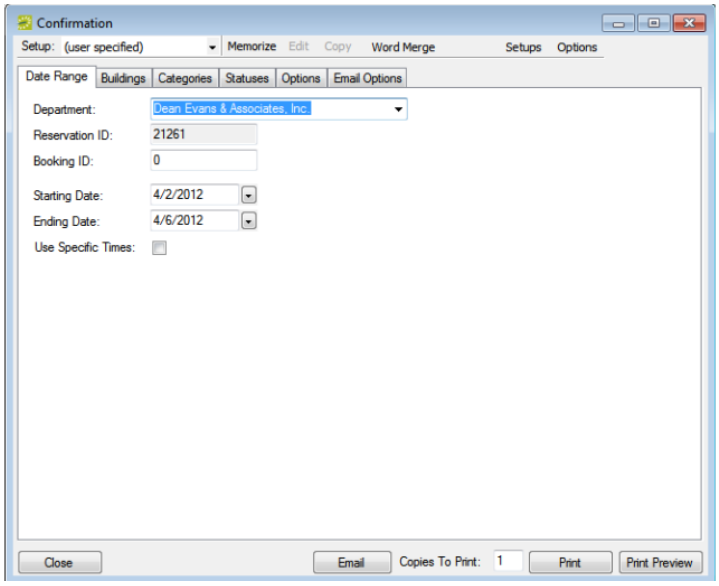
You can generate a confirmation for all the bookings in a reservation, or just for a selected booking in a reservation. In the as-delivered implementation of EMS, when you generate a confirmation for a reservation or a booking, the Confirmation dialog box opens. This dialog box has the same tabs as the Confirmation Settings dialog box. It also contains options for generating a print preview of the confirmation and for manually printing or emailing an EMS-generated confirmation.

See Also:

- Your Confirmation Settings determine the information included in a confirmation. See Also: Specify Confirmation Settings.
- To generate multiple confirmations in a single step, see also: Generating Multiple Confirmations.
- You can Memorize your confirmation settings for the next time you generate the confirmation. See Also: Working with Saved Reports.

Manually Generating One Confirmation at a Time

1. Open a reservation.
2. In the left pane of the Navigator, select the reservation for which you are generating the confirmation.
    - You can also associate the confirmation with a specific booking within the reservation by selecting it in the Bookings (lower right) pane.
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. On the **Date Range** tab, you can limit the confirmation to specific bookings and/or specific booking times. When the dialog box first opens, the Confirmation Setup is set to (user-specified).

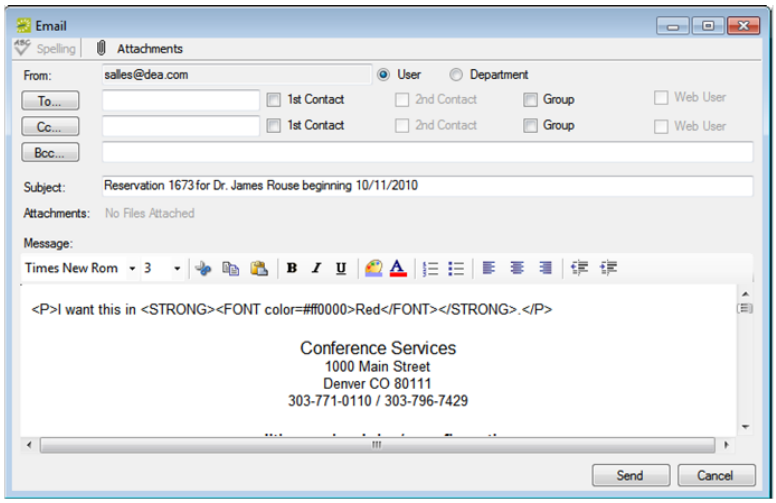


Confirmation Dialog Box, Date Range Tab

4. 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.
   - From the Setup drop-down list, you can select a 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. Generate a printed confirmation or email one:
   - For a printed confirmation, enter the number Copies to Print, and click **Print**. A Print dialog box opens in which you can specify information, such as the printer to use and the page range. Click **Print** in this dialog box to manually generate the printed confirmation.

> **Note:**
> Before you print the confirmation, you can view a Print Preview, from which you can email the confirmation, export the confirmation to .pdf, and print the confirmation.

   - For an emailed confirmation, click **Email**. See Sending Email from EMS. Below is an example of the SMTP email window.

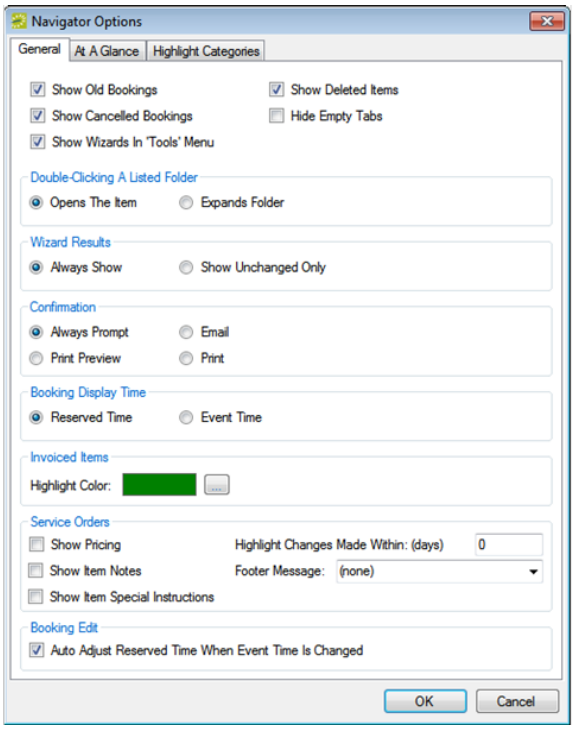


SMTP Email Window for a Confirmation

Automatically Generating 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 a reservation.
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.



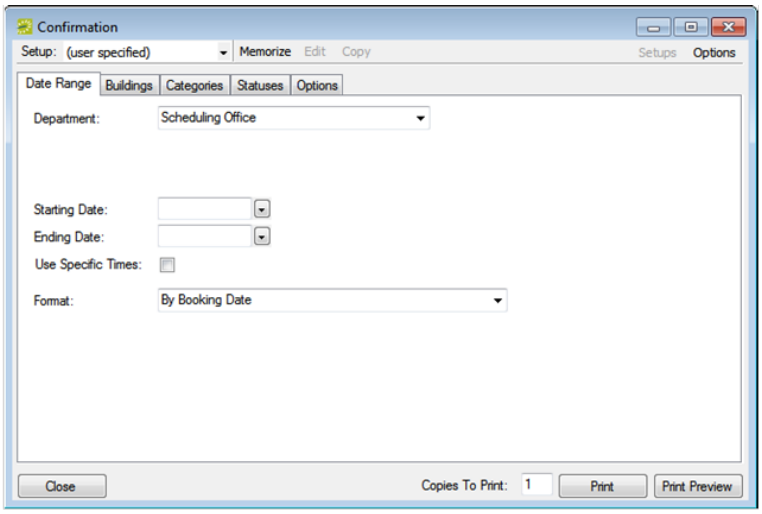
Navigator Options Dialog Box, General Tab

3. Under Confirmation, select one of the following:
   - **Email**—Always automatically generate an emailed confirmation based on your confirmation settings.
   - **Print**—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 initiate a Confirmation in the Navigator, EMS will Email or Print your confirmation based on your settings above.

CHAPTER 289: Generate Printed 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 Also: Confirmations.) 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.

1. On the EMS menu bar, click **Reservations** > **Other** > **Confirmations**. The window opens on the **Date Range** tab.



2. You can either draft a confirmation by completing the fields shown on this page (defined below), or on the Setup drop-down list at the, select a saved, or memorized, confirmation, which means that the only changes that you can make are to the dates and/or times on the **Date Range** tab.

Field	Description
Date Range Tab	

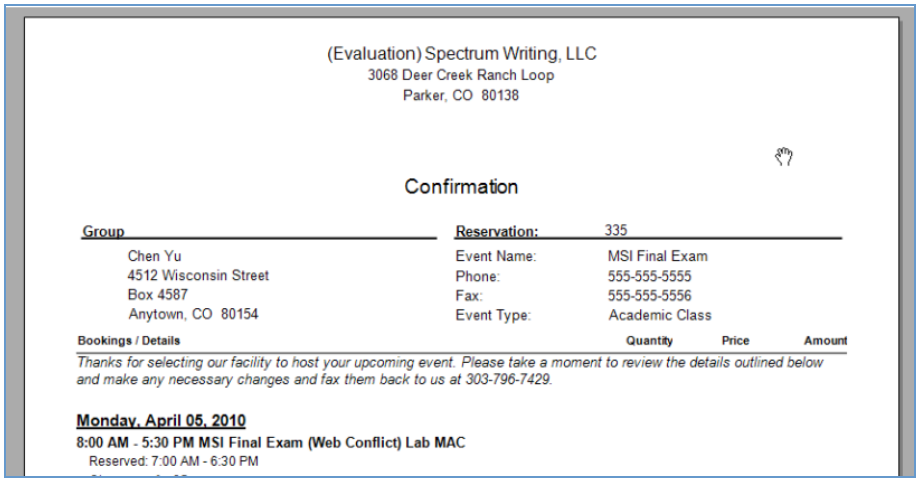
Field	Description
Department	The department name that appears at the top the printed confirmation.
Starting Date Ending Date	The range of dates for which you are generating the confirmations.
Use Specific Times	Available only if the Starting Date is the same as the Ending Date. If this option is selected, 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	Include the comments for the reservation in the printed confirmation.

Field	Description
Comments	
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 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.

Field	Description
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.

> **Note:**
> If needed, you can always save or memorize, these settings. See Also: Work with Saved Reports.

3. To print the confirmation, 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.


(Evaluation) Spectrum Writing, LLC
3068 Deer Creek Ranch Loop
Parker, CO 80138

Confirmation

Group
Chen Yu
4512 Wisconsin Street
Box 4587
Anytown, CO 80154

Reservation: 335
Event Name: MSI Final Exam
Phone: 555-555-5555
Fax: 555-555-5556
Event Type: Academic Class

Bookings / Details | Quantity | Price | Amount

Thanks for selecting our facility to host your upcoming event. Please take a moment to review the details outlined below and make any necessary changes and fax them back to us at 303-796-7429.

Monday, April 05, 2010
8:00 AM - 5:30 PM MSI Final Exam (Web Conflict) Lab MAC
Reserved: 7:00 AM - 6:30 PM

   - 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 and the page range. Click **Print** in this dialog box to manually print the confirmations.

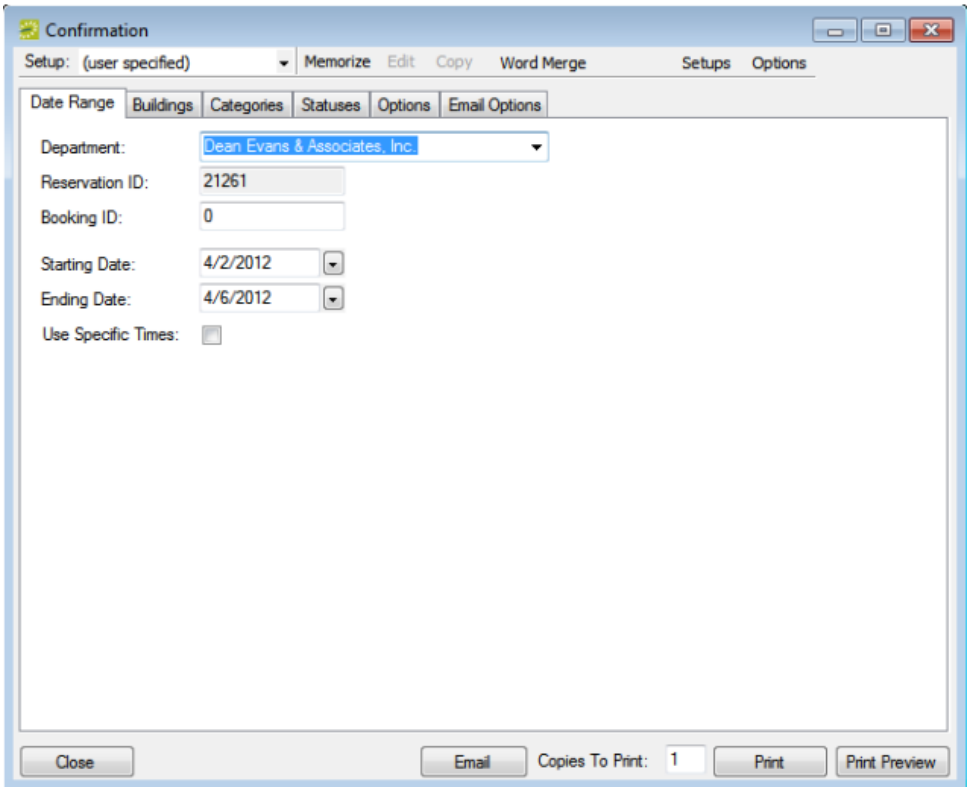
CHAPTER 290: Generate Word Merge Documents for Custom Documentation

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.

To generate Word Merge Documents, follow these steps:

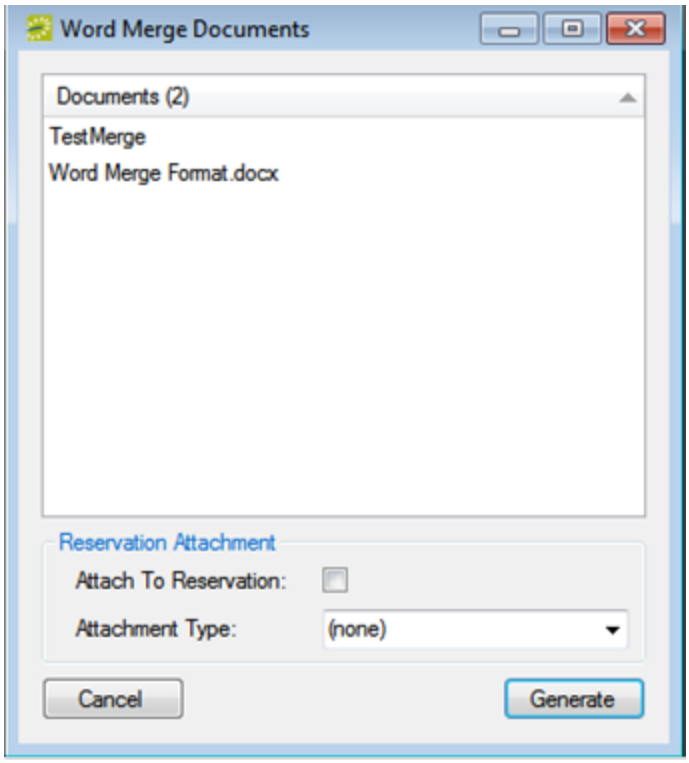
1. Open the reservation in the Navigator. See:
   - Opening a reservation directly in the Navigator
   - Opening a reservation through the Reservation Book
   - Opening a reservation through a group
   - Search Tools
2. In the left pane of the Navigator, do one of the following:
   - Select the reservation 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.



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.



Word Merge Documents Dialog Box

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.

Note:
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.

CHAPTER 291: Send Emails

Once your EMS Desktop Client Administrator has configured system email for EMS Desktop Client, you can set personal preferences on your installation of the application to email confirmations or invoices to groups or miscellaneous information to your EMS users or groups.

Your personal preferences on your installation of the EMS Desktop Client control how emails are sent:

- If your organization uses Microsoft® Outlook, you can set preferences to use your respective email system within EMS Desktop Client to send confirmations and invoices or any other individual emails to EMS users or groups.
- To send bulk emails to groups within EMS Desktop Client (basic/advanced, transactions, calendar, and so on), however, you must set preferences to use SMTP email.
- If your organization does not use Microsoft® Outlook, furthermore, SMTP email is also used to send all email from EMS Desktop Client, including emails to users or groups and confirmations and invoices.
- Generic emails (which are not "tied" to a confirmation, invoice, reminder, etc.) can go to any recipient.



Note:

For any of your personal email preferences to work, your user account must be configured with an email address. See your EMS administrator or internal IT staff for information on how to enable SMTP email.

Email Reservation Attendees from the EMS Desktop Client Application

1. Select a reservation, and then click **Email** to open a pre-addressed SMTP email to the group associated with the reservation.
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**.

Send a Meeting 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 Also: Setting User Preferences and Default Values.) 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 Also: Setting User Preferences and Default Values.) The To field is populated with the email address for the associated group, but you change this value if needed.

> **Note:**
> 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.

> **Note:**
> To include the entire confirmation as an attachment, or an .ics file in a confirmation, see Specify Your Confirmation Settings.

4. Click **Send**.

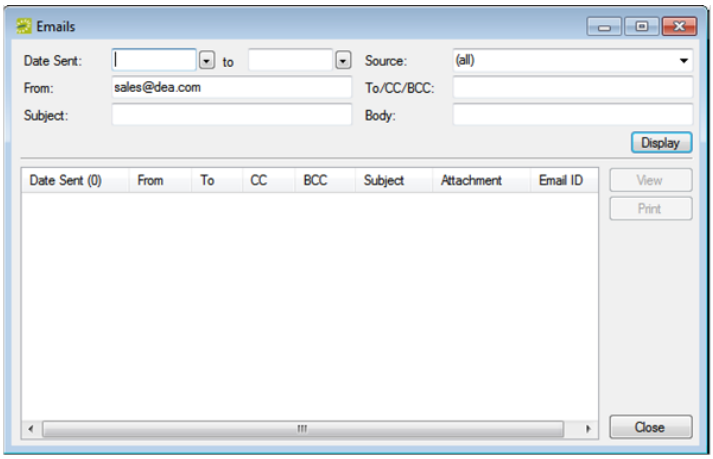
Send a Generic Email

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 Also: Setting User Preferences and Default Values.)
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**.

CHAPTER 292: View 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, guest requests, and group and contact information), and generic emails. You can also view the contents of sent emails and print 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.



2. Enter the search criteria for the emails, and then click Display.

   All of the emails that meet the search criteria are displayed in the bottom pane of the Emails window.

> **Note:**
> Under Source, the Report option collectively refers to confirmations, invoices, reminders, queries, group requests, and group and contact information.

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.

EMS Desktop Client - April 2019

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