Using EMS Web App

FIU CENTRALIZED RESERVATION OFFICE
EMS SOFTWARE
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GETTING STARTED WITH THE EMS WEBAPP

LOGGING IN AND OUT

You can access EMS Web App through any standard Internet browser.

1. Open an Internet browser session and navigate to reservations.fiu.edu. The EMS Web App home page opens, prompting you to Sign In.

2. In the Email Address field, enter your FIU email address and FIU password. Click for help with your password or contact your Administrator if you do not have one.

3. Then click Sign In. The window changes to show your MY HOME and offer more options for creating reservations and browsing events, locations, and people.

TO LOG OUT

Under your name in the upper right corner, click the dropdown arrow and then click Sign Out.
Once you have signed in to EMS, you will see a menu on the left and your home page on the right. To begin making a reservation, click **CREATE A RESERVATION**. To explore events, locations, and people, use the options under **BROWSE**.

### MAIN MENU

The menu on the left enables you to:

- **CREATE A RESERVATION**
- **MY EVENTS** (shows your events in a calendar grid by **Day**, **Month**, or **Date**)
- **BROWSE**
  - **EVENTS** in a calendar grid
  - **LOCATIONS** (Buildings, Facilities, Regions, and Rooms)
  - **PEOPLE**
- **LINKS** (your favorite shortcuts)
Once you click on MY HOME the page shows three regions:

- **My Reservation Templates** (different types of reservations you can make)
- **My Bookings** (your reservations)
- **My Infographics** (a summary of your activity)

**Tip:** Anywhere you see "..." on a room name, you can click to expand and see the full room name.
Clicking the **SITE HOME** tab will show your organization's customized EMS home page.

This is FIU's online application to request meeting, study, and event spaces as well as support services and recreational equipment. We are here to assist you with finding the best space for your event and the most efficient way to reserve it.

Selected spaces are currently available to browse and reserve. These include:

<table>
<thead>
<tr>
<th>BBC Wellness and Recreation Center</th>
<th>UARC Pavilion</th>
<th>shoplounge</th>
</tr>
</thead>
<tbody>
<tr>
<td>College of Business</td>
<td>Miami Beach Urban Studios</td>
<td>Wolfe University Center</td>
</tr>
<tr>
<td>FIU @ I-75</td>
<td>Other UMRI Athletic spaces</td>
<td>Ricardo Silva Stadium</td>
</tr>
<tr>
<td>FIU in DC</td>
<td>Ocean Bank Convocation Center</td>
<td>School of Music</td>
</tr>
<tr>
<td>Graham University Center</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Access to additional spaces will be available for Phase 2. You may contact the respective Facility Manager for spaces not listed above.

Recreational equipment is limited to BBC Wellness and Recreation and only for department and student organizations events only. Students wishing to request recreational equipment may contact BBC REC directly.

If you are hosting a personal event, please log out and use the “request a room” tab under “Welcome, Guest” to submit your request.

### READY TO PLACE A REQUEST?

1. Click on “Create A Request” and choose from one of the Reservation Templates.
2. Once you have identified a template that applies to you, click on “book now” and proceed with your reservation request.
3. Your request should be as detailed as possible but you may book a space even if you do not know all of the specific service needs or have all of the required documentation at the time of submitting the reservation request.
4. Please ensure the name under “first contact” is the person who can make decisions and answer questions regarding the event.
5. You will receive a “Request Summary” via email once you submit your request. However, this is not a guarantee of availability nor approval use of requested space. Your Event Coordinator will contact you within two business days for any further questions regarding this reservation. You may also check the status of your request by visiting reservations.fiu.edu and clicking the “My Events” tab.

For a complete overview on how to navigate this site, check out this Quick Guide. You can download this manual onto your computer for easy access.

**Questions?**

Contact the Central Reservations Office (CRO) at (305) 348-1100 or visit AskCRO.fiu.edu.

Be sure to log out once you are finished!
The **BROWSE** section of the main EMS Web App menu enables you to explore Events, Locations, and People.

In the next sections, you will learn how to: Browse Events, Browse Locations, and Browse People.
BROWSING EVENTS

You may wish to browse and explore existing events before you make a reservation in order to build familiarity with facilities, related or adjacent events, and other users’ reservations.

BROWSING EVENTS BEFORE MAKING A RESERVATION

1. Click Browse>Events in the menu bar.

2. The BROWSE EVENTS page displays events in a daily (default), weekly, or monthly view.

3. To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.
4. To see Room information, click the room name.

![Room Information](image)

**BROWSING EVENTS: USING FILTERS**

You can use filters along the top of the Browse Events window to narrow your results. These are explained below.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>Events scheduled for the current day’s date in a list view.</td>
</tr>
<tr>
<td>Weekly</td>
<td>Events scheduled for the current week (weeks always begin on a Sunday) in a list view.</td>
</tr>
<tr>
<td>Monthly</td>
<td>Events that are scheduled for the current month in a calendar view.</td>
</tr>
</tbody>
</table>

To filter basic information, use the filters along the top of the window.

<table>
<thead>
<tr>
<th>Basic Filters</th>
<th>How They Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date on which the view will focus.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>The Time zone on which to display the schedule.</td>
</tr>
</tbody>
</table>

To filter in more detail, click the dropdown option.

<table>
<thead>
<tr>
<th>Detailed Filters</th>
<th>How They Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locations</td>
<td>Browse only events for the location you select.</td>
</tr>
<tr>
<td>Room</td>
<td>Browse only events for the room you select.</td>
</tr>
<tr>
<td>Group</td>
<td>Browse only events for the group you select.</td>
</tr>
<tr>
<td>Event Name</td>
<td>Browse for a specific event by name.</td>
</tr>
<tr>
<td>Group Type</td>
<td>Browse for all events for a type of group you specify.</td>
</tr>
<tr>
<td>Room Types</td>
<td>Browse for events in a type of room you specify.</td>
</tr>
</tbody>
</table>
The EMS Web App LOCATIONS menu option helps you explore facilities and booked space, and is especially useful when you know which space you want and need to find time slots when the space is available. Once you have located an available time slot, you can click CREATE A RESERVATION from the main menu to book space.

1. From the left menu in EMS Web App, click **BROWSE > LOCATIONS**. The Browse Locations page shows available rooms in a calendar view.
Concept: Filters along the top of the Browse Locations page enable you to quickly focus the view on rooms in a specific timeframe, and by room features such as equipment, room type, and geographic location. This helps you find available space to quickly meet your requirements. To add and remove location filters, click the Add/Remove Locations option, which presents a Locations filter popup where you can select by building, area, and view.

2. To learn more about a location, click the location name. The Location Details window appears (if you have permissions), showing details about the location.

3. Click View All Building & Room Details to see details. Depending on how your Administrator has configured your EMS Web App application, the window can show varying information about the location, including the building details (name, description, and/or notes), photos and floorplans (images), description, room type, setup type, and other features.
**Tip:** The LINKED TEMPLATES tab may be available depending on your implementation. This option will allow you to make a reservation for this room. Once you locate a room you wish to book, use this shortcut to quickly begin the process.

Anywhere you see "..." on a room name, you can click to expand and see the full room name.
LOCATING PEOPLE

You can click BROWSE > PEOPLE from the main EMS Web App menu to find events by the person who reserved or is attending the event, or to simply find where a user or group will be located at a given time.

• To see all people and groups who have events scheduled for today, leave the Name field blank and click Search. To narrow the results to only the bookings for one person or group, click on the user or group name.

• To search for a specific person or group, enter at least the first three letters in the Name field (EMS Web App will suggest the closest match), and then click Search.

Tip: The Search field is not case-sensitive and you can search by first or last name.
The BROWSE EVENTS page displays events in a daily (default), weekly, or monthly view.

**Tip:** To view and work with your own reservations and bookings, click on MY EVENTS.
To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.
MAKING A RESERVATION IN THE EMS WEB APP

You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the button next to one of your reservation templates (on the right).

Next, the Create a Reservation screen appears, where EMS Web App will lead you through the reservation process. Enter information (including all required fields) using the Next Step button to advance through the process.
Specify When & Where

1. To specify When, select dates, times, recurrence (optional) and time zone for the reservation in the upper left panel.

2. To specify Where, in lower left panel, select

- Let Me Search for a Room

OR

- I Know What Room I Want

Tip: Filters in this lower left panel help you narrow your Room Search Results. When you click Search, results appear on the right. From these results, you can view expanded Room Details by clicking on the room name.

Locating space as part of the reservation process is different than browsing locations.

Tip: Once you have established favorites, EMS Web App uses these (plus the parameters of the booking template in use) to filter your search results when you use the Let Me Search for a Room option. To expand your search results beyond your favorites, de-select the Favorite rooms only checkbox or click Add/

Remove next to Locations.
3. Once you have located a room to reserve, click the Add icon to add the booking to your cart. You can delete or change the room before finalizing your Reservation.

4. Once you complete all required fields on this tab, click in the upper right corner.

Choose Services Step

Concept: This is an optional feature based on the booking template you use.

Services include room setup and teardown, equipment, and any other services you wish to associate with a room. Your Administrator sets which services can be associated with a room and with an event type.

7. Under the Services tab in the Create Reservation screen, specify any services you wish to associate with the reservation (if available, you can click Skip Services).
8. When complete, click in the upper right corner.
Add Reservation Details

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to all attendees. The example shown below may differ from your implementation.

9. Complete all required information and click

Save Reservation Details

, and then

Create Reservation

.

Tip: To add the reservation to your Outlook calendar, click the Add this reservation to my calendar option at the bottom of the window.
WAYS TO MAKE RESERVATIONS

The EMS Web App provides several ways for you to make a new room request or event reservation:

1. Request a Reservation
   If you logged in as a guest, you can submit a reservation request that will be approved by an authorized EMS Web App user.

2. Book Now Using Your Template
   Click the book now button next to the template you prefer from your home page, and then browse for available time slots and rooms.

3. Browse and Then Book
   Click BROWSE (main menu):
   - Browse EVENTS. Then request a reservation or, if authorized, click CREATE A RESERVATION from the main menu and select a template to streamline the booking process.
   
   OR
   
   - Browse LOCATIONS, find the room you want, and click on any blank slot in the room’s calendar. Then select a template to streamline the booking process.
Tip: First Browse and Then Book

To familiarize yourself with the locations, try Browsing Events, Locations, and People before requesting rooms or making reservations. Exploring the EMS Web App this way helps you explore available space, view the schedule at a high level, and understand how other users in your organization reserve rooms. You can also establish your own naming conventions for your events and narrow down your searches to specific room types, room features, event types, geographical areas, and so on.

Concepts: Booking Templates, Requests, and Reservations

Templates: Your My Account settings contain reservation Templates created by you or your Administrator to streamline the process of booking events. Rooms and workspaces are individually set to work with various types of booking templates by your Administrator.

Requests vs. Reservations: Depending on your permissions, you may Request a Room or Make a Reservation. Room requests require approval from a more supervisory user, and are visible to other users so they know the space has been tentatively booked. The EMS Web App behaves differently for each type of user, showing fewer options (and usually, less information) for those who can only request rooms.
What's the difference between a "reservation" and a "booking?" A Reservation consists of one or more Bookings. That's it.

Every booking belongs to a reservation. EMS lets you have multiple bookings under a single reservation. When you have multiple bookings in a reservation, each booking can be independent of the other, such as reserving a set of rooms for an event, or can be a series of bookings under a Recurring reservation.

Each booking can contain multiple Booking Details, which are the resources and services required to support the booking (such as catering and room setup).

RESERVATIONS: WHO AND WHAT

A reservation is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).

BOOKINGS: WHERE AND WHEN

A booking is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.
A booking can have one or more booking details associated with it. Booking details are the resources (items for the meeting) or services (people and their activities) 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 the Academic Planning Board’s staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker's podium, and so on.

Service Orders

System Administrators configure "buckets" of these details as "Categories," which streamlines the process of adding details to bookings.

Concept: Services, Categories, and Resources: What's the Difference? (click to expand)

In EMS, you may hear these terms used interchangeably sometimes, 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 types:

- 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 here 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” and then see flipchart and whiteboard as options to add to the event.

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 EMS Desktop Client.
VIEWING YOUR EVENTS

You can quickly view your events, reservations, and requests on both your MY HOME page as well as your MY EVENTS page.

1. Click MY EVENTS to see your reservations and bookings. Your view defaults to your current reservations. To view or edit a reservations, click the name of the reservation.

Tip: EMS only returns search results that contain the exact order of the characters in your search string, but EMS does not care about if your search string is uppercase or lowercase. In addition, EMS will return search results that contain your search string regardless of where those characters appear. For example, a search string of ed returns the College of Education Seminar, Ed Smith fundraiser, Health Center Education Training, and so on.

Concept: The BROWSE > EVENTS menu option shows all of your reservations as well as all reservations that you are authorized to view. The MY EVENTS menu option shows only your reservations and bookings. Before making your own reservations, especially if you are a newer EMS Web App user, we recommend that you BROWSE > EVENTS first to build familiarity with your organization's booking practices, schedule, facilities, and users.

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2. To view Reservation and booking details, click on an event name. Event details display; bookings within the reservation show in the lower half of the screen.
SEARCHING FOR AVAILABLE ROOMS

During the booking process, you can search for available rooms in two ways:

1. From the Create a Reservation screen, in the Bookings area, select
   • Let Me Search For A Room
   OR
   • I Know What Room I Want

Tip: Filters in the left panel help you narrow your Room Search Results. When you click Search, results appear on you can view expanded Room Details by clicking on the room name.

Locating space as part of the reservation process is different than simply browsing locations.

2. Once you have located a room to reserve, click the Add icon to add it to your reservation; this adds the booking to your cart. You can change your mind and delete or change the room for the booking before you finalize your Reservation.
BOOKING MULTIPLE ROOMS

During the reservation process, you can select more than one room (if the template you’re using permits it).

1. Once you have found available rooms, click Add
to move each room into the Selected Rooms area. You can repeat this for each room you want to add to your reservation.

As you book each room, EMS will prompt you to enter attendees and setup type.

2. Click
Next Step
to continue with the booking process.
You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the button next to one of your reservation templates (on the right).

Next, the Create a Reservation screen launches, where EMS Web App will lead you through the reservation process. Enter your information (including all required fields) and click to advance through the process.

**SPECIFY WHEN & WHERE**

1. To specify **When**, select dates and times.
2. Click the **Recurrence** button.
a. Follow the prompts to select the frequency, date range, day of the week, start and end times, and time zone for the recurrence.

![Recurrence Screen](image)

b. Click **Apply Recurrence**

   ![Apply Recurrence Button](image)

   to validate your entries and return to the New Booking screen.

   **Tip:** Once booked, each meeting will show as a single Booking in your My Bookings area on MY HOME. Also, note that the **Create Booking In** field specifies the time zone in which to book the meeting, which may differ from your system time zone.

3. To specify **Where**, in lower left panel, select
   - **Let Me Search For A Room**
     - OR
   - **I Know What Room I Want**

   **Tip:** Filters in this lower left panel help you narrow your Room Search Results. When you click **Search**, results appear on the right. From these results, you can view expanded Room Details by clicking on the room name.

   Locating space as part of the reservation process is different than simply browsing locations.

4. Once you have located a room to reserve, click the Add

   ![Add Icon](image)

   icon to validate and add the booking to your cart. You can delete or change the room before you finalize your Reservation.

5. Once you have completed all required fields, click

   ![Next Step Button](image)

   in the upper right corner.
**CHOOSE SERVICES**

*Concept:* This is an optional feature based on the booking template you use. Services include room setup and teardown, equipment, and any other services you wish to associate with a room.

1. Under the **Services** tab in the Create Reservation screen, specify any services you wish to associate with the reservation, or click **Skip Services**.
2. When complete, click **Next Step** in the upper right corner.

**ADD RESERVATION DETAILS**

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to all attendees. The example shown below may differ from your implementation.

Complete all required information and click **Save Reservation Details**, and then **Create Reservation**.

*Tip:* To add the reservation to your Outlook calendar, click the Add this reservation to my calendar option at the bottom of the window.
If you open an existing reservation or create a new one, the Reservation Summary page opens. This area enables you to modify bookings within a reservation, such as requesting services and adding attendees.

The Reservation Details option displays detailed summary information (the Reservation ID, the Event Name, the Event Type, and so on) for the selected reservation and all its bookings as well as attendees and any services that were requested for the bookings.

What's the difference between a "reservation" and a "booking?" A Reservation consists of one or more Bookings. That's it.

Every booking belongs to a reservation. EMS lets you have multiple bookings under a single reservation. When you have multiple bookings in a reservation, each booking can be independent of the other, such as reserving a set of rooms for an event, or can be a series of bookings under a Recurring reservation.

Each booking can contain multiple Booking Details, which are the resources and services required to support the booking (such as catering and room setup).
RESERVATIONS: WHO AND WHAT

A reservation is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).

BOOKINGS: WHERE AND WHEN

A booking is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.

BOOKING DETAILS

A booking can have one or more booking details associated with it. Booking details are the resources (items for the meeting) or services (people and their activities) 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 the Academic Planning Board’s staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker’s podium, and so on).
SERVICE ORDERS

System Administrators configure “buckets” of these details as “Categories,” which streamlines the process of adding details to bookings.

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

In EMS, you may hear these terms used interchangeably sometimes, 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 types: 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 here 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" and then see flipchart and whiteboard as options to add to the event.

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.

ATTACHMENTS

The Attachments tab is available if the reservation type required attachments; it provides the attachment description, file name, and notes about the attachment. You can:

• **Delete** an attachment from a reservation or request.

• **Attach** another file to the reservation or request, click Attach File. A dialog box opens where you can select the attachment. (Allowed formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.)
The lower portion of the Reservation Summary page shows bookings for this reservation and (if you have permissions) enables you to add another booking, edit or delete existing bookings, and take other actions on those bookings.

<table>
<thead>
<tr>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>✖️ Cancel Booking</td>
<td>Cancel selected bookings for the reservation.</td>
</tr>
<tr>
<td>Attendance</td>
<td>Booking headcount.</td>
</tr>
<tr>
<td>Setup Type</td>
<td>Setup Types are defined by your Administrator, and define which services, resources, and room types can be used for the booking.</td>
</tr>
<tr>
<td>Status</td>
<td>Stage in the booking process for the booking, such as Requested, Reserved, Pending.</td>
</tr>
</tbody>
</table>
1. To add services to an existing event, click on My Events and open the reservation you wish to edit.
2. Click Add Services to add these details to the meeting.

**Tip:** Once you have added services and reserved space, you can work with services by clicking Manage Services.
3. The first screen shows any existing services for the meeting and click on services you wish to add from the list of available options.

4. When you click a service to add, a popup screen may prompt you to specify a quantity for the item and add notes, special instructions, and so on. Click OK to save your changes.

5. The right panel of the Select Services window updates to show your latest additions. When you have added all services for the meeting, click the Next Step button.
6. The next screen lists all bookings within the reservation you selected from My Events. Select the booking to which you wish to add services (if the reservation includes multiple booking, they are all listed here for you to select), and click the **Add Services** button.

7. You return to the Reservation page and a confirmation appears briefly confirming your changes.
**Concept: What are Services, Categories, and Resources?**

In EMS, you may hear these terms used interchangeably sometimes, 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 types*: 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 here 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" and then see flipchart and whiteboard as options to add to the event.

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 EMS Desktop Client.

1. While creating a new reservation, navigate to the Services tab. The services your administrator has defined as available for the booking template and room(s) you selected are listed on the left panel.

   **Tip:** If you are editing an existing reservation, click the Add Services option in the Reservation Tasks menu on the right, or open the Reservation Details and select the Services tab.

2. Click the Services dropdowns to expand and pick a service. You can add resources with service orders, catering (food) services, resources without service orders, setup notes and/or a room charge. You can add multiple services to a reservation and to a booking.
Concept: Options available in the Services dropdowns depend on several factors leading up to this stage in the booking process: your booking template parameters, setup type, and other rules set by your System Administrator.

3. Enter the necessary information for the services you are adding to the reservation.

   Note: Required fields are marked with red. You may need to add information such as the start and end times, the estimated count, and so on. You may also have to answer service-specific questions, and/or have to agree to Terms and Conditions.

   Tip: You can add notes for each services you add to a reservation. These will only appear if you open the booking, and not in the Booking Summary.

4. At the bottom of the page, click Next Step.

   The Available Services tab closes. You advance to the Reservation Details tab.

   • If the reservation has only this single booking, a confirmation message displays. Click OK to close the message and return to the Booking Details tab. The newly added booking detail shows on the Existing Services tab.

   • If the reservation has multiple bookings, then choose whether to add services to just the one booking, or several:
     ◦ To add the services to only this booking, click Do Not Apply to Additional Bookings. You remain on the Booking Details tab. The newly added services show on the Existing Services tab.
     ◦ To add the services to one or more of the other bookings in the reservation, select them (you can select all using the checkbox in the Date column heading), and then click Save. A confirmation message displays. Click OK to close and return to the Booking Details tab. The newly added services now show on the Existing Services tab.
From an existing booking within one of your reservations, click the **Manage Services** option (if available) under the Bookings list. This enables you to change or cancel (delete) services for a booking, individually, per service item, or by service category.

On the Manage Services page that presents, you can subtract services from the Services Summary view (if enabled). Services are listed in the right panel by category.

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**Note:** The event type and the booking status (as well as your Administrator settings) affect whether the **Manage Services** option is available.
This section guides you to work with bookings in the Reservation Details page on EMS Web App, where you can view, add, change, or cancel services and attendees for a booking. For an overview, see Reservation Details. A reservation may contain multiple bookings, so the procedures below guide you in applying your changes to more than one booking within a reservation.

CANCELING RESERVATIONS

1. Navigate to the reservation with which you wish to work: click **MY EVENTS** on the main EMS Web App menu (or from the My Bookings area on **MY HOME**). Then click on a Reservation.

   ![Image](image_url)

   **Tip:** When you click to edit a Reservation or Booking, the page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.

2. From the Reservation Details page, click **Cancel Reservation**.

   ![Image](image_url)

   **Warning:** Canceling a reservation will also cancel all bookings under the reservation.
3. In the **Cancel Reservation?** popup that appears, select a **Cancel Reason** and add **Cancel Notes**, and then confirm that you want to cancel.

![Cancel Reservation popup](image)

3. Your MY EVENTS pages refreshes and the reservation is canceled.

**CANCELING BOOKINGS**

1. From the **ReservationDetails** page in the Booking area, to cancel a single booking, click the date of the booking or the **Remove** icon next to the booking. (These options are available if your administrator has given you permission).

![ReservationDetails page](image)

**Tip:** To cancel multiple bookings, click **Cancel Bookings** in the upper corner of your My Events list.

2. In the **Cancel Booking?** Popup that appears, select a **Cancel Reason** and add **Cancel Notes**, and then confirm that you want to cancel.
Your MY EVENTS page refreshes and the booking is canceled.
This section guides you in working with bookings in the Reservation Details page on EMS Web App, where you can view, add, change, or cancel services and attendees for a booking. For an overview, see ReservationDetails. A reservation may contain multiple bookings, so the procedures below guide you in applying your changes to more than one booking within a reservation.

1. Navigate to the reservation with which you wish to work: click **MY EVENTS** on the main EMS Web App menu (or from the My Bookings area on your homepage). Then click on the name of the Reservation.

   **Concept**: Your Administrator defines room Setup Types and Event Types for you to choose from; this controls which services (if any) that you can add to the event.

   **Tip**: When you click to edit a Reservation or Booking, the page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.

2. From the Reservation Details page, use the highlighted areas to work with the reservation.
Important: When you finish editing a Reservation, be sure to confirm and save.

CHANGING BOOKINGS

1. From the Reservation Details page in the Booking area, click **Edit** next to the booking. (These options are available if you have permissions).

2. The Edit booking window appears, where you can make changes to the booking.

   **Tip:** If the booking is one of a series, you can click the event name to navigate to the Reservation Summary page, and the **Edit** icon to see navigate directly to the Booking Details page.

   **Important:** When you finish editing a Booking, be sure to confirm and save.
PERSONALIZING YOUR ACCOUNT

The My Account menu enables you to customize your user profile:

• Create your own, timesaving booking templates, which set default values (Start Time, End Time, and so on) for your most frequent types of reservations and room requests. These templates appear on your personal Home Page after you save them.
• Set a list of favorite rooms to streamline your search for available space.

The My Account menu is available in the upper right corner of EMS Web App next to your name once you log in.
You can personalize booking templates to streamline your process for requesting rooms and making reservations (depending on your permissions). These templates appear on your personal EMS Web App home page after you save them.

1. In the upper right corner of EMS Web App, click on the dropdown next to your name and select My Account.

2. From the My Account page, click Personalization and then click the Templates button.

3. You can change the default values for a template only if your administrator has set your permissions accordingly: select the template you wish to change. The lower section changes to show options for the selected template.

**Concept:** Essentially, your settings here automatically populate field values and filter search results when you make room requests, so for instance, setting a Start Time here will set a start time for any room request you make using this template; setting a Setup Type will filter search results to only show rooms with that setup type.
Tip: If you select the **Override location and time zone settings when I search for available space** option under Locations, this means that whenever you book using this template, you can change the default location for this template during the booking process. For example, if your template Location was Denver and during booking, you added Kansas, the template would be updated to Kansas going forward.

4. When you have finished making changes, click **Save Changes**.
FAVORITING ROOMS

Under My Account, you can create a list of favorite rooms. This streamlines the process of searching for available space when you request or reserve rooms.

1. Under the dropdown arrow next to your name in the upper right corner of EMS Web App, click My Account.

The User Options page opens, showing tabs along the top where you can customize your user profile.

2. Click the FAVORITE ROOMS tab to work with a list of your favorite rooms. Any rooms you have already saved as favorites are listed under Your Saved Favorite Rooms.

3. In the Search field, you can search for room you wish to favorite (your search string is not case-sensitive but characters must be in the correct order). Enter the search string and click Search results will display below.

4. To add a favorite to the list, select it from the search results. The room is added to Your Saved Favorite Rooms. When you book a room in EMS Web App, you can now choose more quickly from your Favorites list.
Tip: Once you have established favorites, EMS Web App uses these to filter your search results when you search for available space during the reservation process.

To remove a favorite, click next to the room in Your Saved Favorite Rooms.
FAQS

• How do I search for available space? What if I only want to make a reservation if a specific room is available?
  Use the BROWSE options from the main menu.

• Why can’t I make a reservation?
  Several settings control your capabilities as a user.

• Why are some options not available to me?
  This is probably because of settings controlled by your Administrator.

• Can I let someone else make reservations on my behalf?
  If enabled by your Administrator, you can "delegate" to other users. They will then opt to "act as" you from their My Account menu.

• How do I check if a room I want is available? How do I check a person's availability when making a reservation?
  Start at the My Home page and Browse Events, Locations, People.

• How do I add Services to a booking?
  You can add them during the initial booking process or by editing it later. Services, Resources, and Categories interact as part of the booking details for an event.
Concepts: Booking Templates, Requests, and Reservations

Booking Templates

Your Administrator creates different Booking Templates for different purposes. For example, your Administrator could make one template for individual workspaces, another template for meeting rooms without services like catering, and yet another template for meetings with services.

For each template, your Administrator can enable some fields and disable others. For example, your Administrator could set up a "meeting room with services" template that requires you to enter a purchase order number to pay for the services.

You can set up default values of the templates that are available to you so that you can more quickly make your reservations. For example, if you book a workspace every day from 8:30am to 4:30pm, you can set up these times as default values so that you don't have to enter them every time. (You can override them anytime you need to.)

To set up default values for your templates, go to My Account and then to the Personalization tab.

Requests vs. Reservations

Depending on your permissions, you may Request a Room or Make a Reservation. Room requests require approval from a supervisor and are visible to other users so they know the space has been tentatively booked. The EMS Web App behaves differently for each type of user, showing fewer options (and usually, less information) for those who can only request rooms.
Important: If you logged in as a guest, you will only have permissions to request reservations, therefore the MY EVENTS option will not be available.

What is the Difference Between MY EVENTS and BROWSE EVENTS?

These two menu options on the left side of the EMS Web App enable you to accomplish different tasks:

**MY EVENTS = Reservation Management**

Clicking this area displays all reservations and bookings linked to your profile, and enables you to manage your reservations, change details, and create new bookings.

**BROWSE EVENTS = Explore the Schedule**

Clicking this area provides a view of events on the calendar for you and all users in your organization. This view helps you locate available time slots for space before requesting or making a reservation.
RESERVATIONS, BOOKINGS, AND BOOKING DETAILS

What's the difference between a "reservation" and a "booking?" A Reservation consists of one or more Bookings. That's it.

Every booking belongs to a reservation. EMS lets you have multiple bookings under a single reservation. When you have multiple bookings in a reservation, each booking can be independent of the other, such as reserving a set of rooms for an event, or can be a series of bookings under a Recurring reservation.

Each booking can contain multiple Booking Details, which are the resources and services required to support the booking (such as catering and room setup).

Reservations: Who and What

A reservation is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).
BOOKINGS: WHERE AND WHEN

A booking is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.

BOOKING DETAILS

A booking can have one or more booking details associated with it. Booking details are the resources (items for the meeting) or services (people and their activities) 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 the Academic Planning Board’s staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker’s podium, and so on).

Service Orders

System Administrators configure "buckets" of these details as "Categories," which streamlines the process of adding details to bookings.

Concept: Services, Categories, and Resources: What’s the Difference? (click to expand)

In EMS, you may hear these terms used interchangeably sometimes, 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 types: 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 here 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" and then see flipchart and whiteboard as options to add to the event.

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 EMS Desktop Client.
Why are some features in EMS unavailable to me? Why can't I book a room?

Your Administrator controls what you are able to do and view in EMS using "everyday user templates" based on your user profile. The options and information you can see in EMS depends on your security access, user type, and many other administrative controls.

Additionally, your capabilities are also controlled by your "booking templates" and permissions.