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## Using EMS Web App

This page was not added to the PDF due to the following tag(s): article:topic-guide





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## Getting Started with the EMS Web App

EMS Web App is a web-based application that allows users to browse events in a calendar, view facility information, and if allowed, submit and manage room reservations and service requests.

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**Tip:** Upgrading Users may know this product as Virtual EMS, or VEMS.  
For details about the enhancements in this new release, see [What's New](#).

To get started, see:

### **EMS Web App Booking 101**

Guide to booking meetings in the EMS Web App.

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Pages: 13

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- **Making a Reservation in the EMS Web App**
  - **Ways to Make Reservations**
  - **Viewing Your Events**
  - **Checking In To Events**
  - **Searching for Available Rooms**
  - **Booking Recurring Meetings**
  - **Booking Multiple Rooms**
  - **Booking a Video Conference Room**
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  - **Sending Notifications**
  - **Adding Reservation Details**
  - **Working with Services**
  - **Canceling Your Reservations and Bookings**
- 





**Tip:** These quick video tutorials will help you get started:

- [Web App: Booking a Meeting](#)
- [Web App: Booking a Workspace](#)
- [Web App: Booking a Room With Catering and User Defined Fields](#)





## Logging In and Out

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

1. Open an Internet browser session and navigate to your EMS Web App URL. (Contact your EMS Administrator if you need assistance). The EMS Web App home page opens, prompting you to Sign In.



**Tip:** If your Administrator has enabled it, you can create a Guest Account using the green buttons to the right. This enables you to request rooms; room requests must be approved by designated users in your organization.

2. In the **Email Address** field, enter the email address and password for your EMS User Account. Click for help with your password or contact your Administrator if you don't 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.  
For an overview, see [Introduction to the Home Page](#).

## To log out

Under your name in the upper right corner, click the dropdown arrow and then click **Sign Out**.



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## Introduction to the Home Page

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**.

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**Note:** If not all options display or you are logged in as a Guest, you may need a User Account created by your Administrator.

## 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)

---

## MY HOME

Information on your home page varies depending on your Administrator's settings and User Preferences. For most users, 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)



The screenshot shows the EMS Home page. On the left is a sidebar with 'HOME', 'CREATE A RESERVATION', 'MY EVENTS', 'BROWSE', 'EVENTS', 'LOCATIONS', 'PEOPLE', and 'LINKS'. The main content area has 'SITE HOME' and 'MY HOME' tabs. Under 'MY HOME', there's 'My Reservation Templates' with links to 'Book A Meeting', 'Book A Workspace', 'Book A Video-Conference Room', and 'Book An Event'. Below that is 'My Bookings' for 'FEBRUARY 15, 2016', showing a table of bookings with 'check in', 'cancel', and 'end now' buttons. At the bottom are 'My Infographics' with three pie charts for 'Today', 'This Week', and 'This Month' showing booking status (Reserved, Requested, Cancelled, Past).



**Tip:** Anywhere you see "..." on a room name, you can click to expand and see the full room name.

## SITE HOME

Clicking the **SITE HOME** tab will show your organization's customized EMS home page.

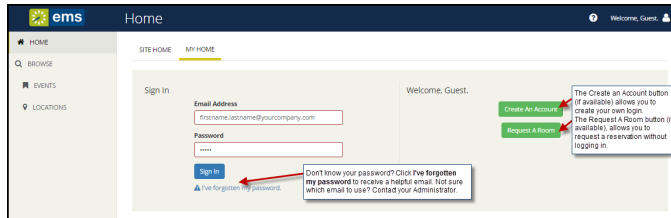






## Creating Your Login or Getting a New Password

1. From EMS Web App Log In screen, if your Administrator has enabled it, you can create a new Account using the **Create an Account** button to the right.



**Tip:** If enabled, you may instead Request a Room as a Guest. These requests must be approved by designated users in your organization.

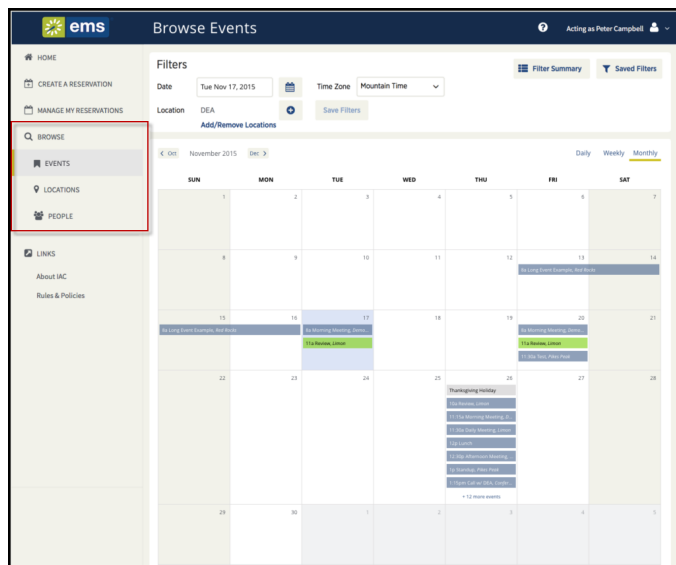
2. Once the Create an Account dialog appears, complete the required fields (red outlines).
  - You can opt out of receiving automatic emails from EMS Web App such as event reminders, confirmations and summaries. These may trigger when you make reservations and or view or modify miscellaneous notes for your account.
  - You will be prompted to enter an authentication code. The code is case-sensitive and must be entered exactly as it is displayed. If you cannot read it, click **Show another code**.
  - EMS Web App does not impose any rules on how to compose your account's password; however, you may have to adhere to your organization's standards for passwords.
3. Click the **Save** button to activate your new account or send it for approval to your Administrator, depending on your implementation.





## Browsing Events, Locations, and People

The **BROWSE** section of the main EMS Web App menu enables you to explore Events, Locations, and People.



Learn how to:

- [Browse Events](#)
- [Browse Locations](#)
- [Browse People](#)



**Note:** The previous version of this application, Virtual EMS (VEMS), had different menu options:

Menu in VEMS	Menu in EMS Web App	How Is This Better?
My Requests	Events	Expands the view to all events you requested
Browse for Space	Locations	Expands the view to Facilities (custom collections of spaces)



<b>Browse Groups</b>	<b>People</b>	Expands the view to Group custom user types.
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## Browsing Events

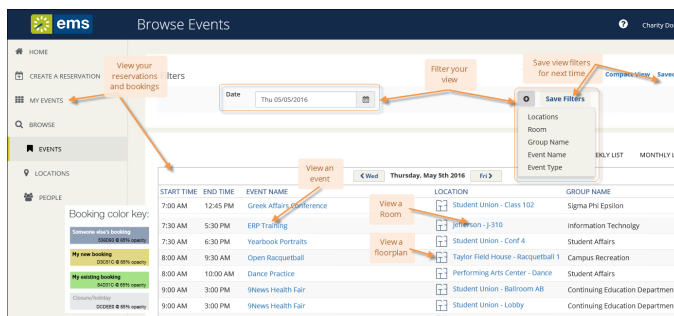
You may wish to browse and explore existing events before you make a reservation in order to build familiarity with facilities, related or adjacent events, and other users' reservations.

## 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.



**Tip:** To view and work with your own reservations and bookings, see [Viewing Your Events](#).



3. To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.



EVENT DETAILS

RELATED EVENTS

*Event Name	This is my event
Date	3/15/2016
*Event Time	7:00 AM - 8:30 AM MT
Reserved Time	7:00 AM - 8:30 AM MT
*Room	103
Group-X	24 Hour Fitness
1st Contact-X Name	Bob Anderson
1st Contact-X Phone	55
1st Contact-X Fax	555
1st Contact-X Email	<a href="mailto:24.com">

Add Event To Calendar

Close

Add to your Outlook calendar

- To see Room information, click the room name.

About Demo Room 05

ROOM DETAILS

SETUP DETAILS

FEATURES

IMAGE

Room Code	IAC HQ - ER
Description	Endeavour Room
Room Type	Conference Room
Floor	2nd Floor
Size	300 sq ft
Phone	212-314-7300 x295
Required Check-in?	No
Allow Check-in X Minutes Before Start of Booking	10

View All Building & Room Details

Close

## Browsing Events: Using Filters

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



**Tip:** Your Administrator may have set up special preset views and filters for you. If you save your filter settings, they are remembered the next time you open the Browse Events page.



View	Description
------	-------------

Daily	Events scheduled for the current day's date in a list view.
-------	---

Weekly	Events scheduled for the current week (weeks always begin on a Sunday) in a list view.
--------	--

Monthly	Events that are scheduled for the current month in a calendar view.
---------	---

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

Basic Filters	How They Work
---------------	---------------

Date	The date on which the view will focus.
------	--

Time Zone	The time zone in which to display the schedule.
-----------	---

To filter in more detail, click the dropdown option.

Detailed Filters	How They Work
------------------	---------------

Locations	Browse only events for the location you select.
-----------	---

Room	Browse only events for the room you select.
------	---

Group	Browse only events for the group you select.
-------	--

Event Name	Browse for a specific event by name.
------------	--------------------------------------

Group Type	Browse for all events for a type of group you specify.
------------	--

Room Types	Browse for events in a type of room you specify.
------------	--

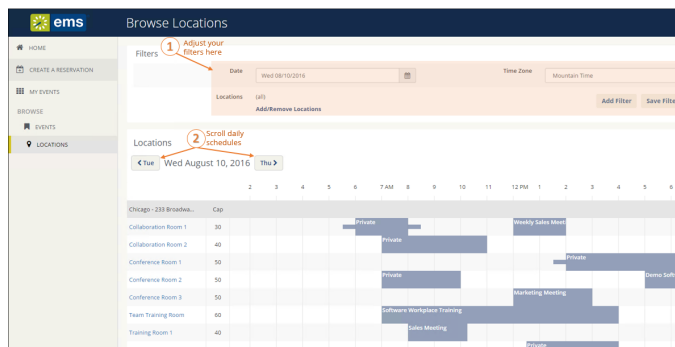




## Browsing Locations

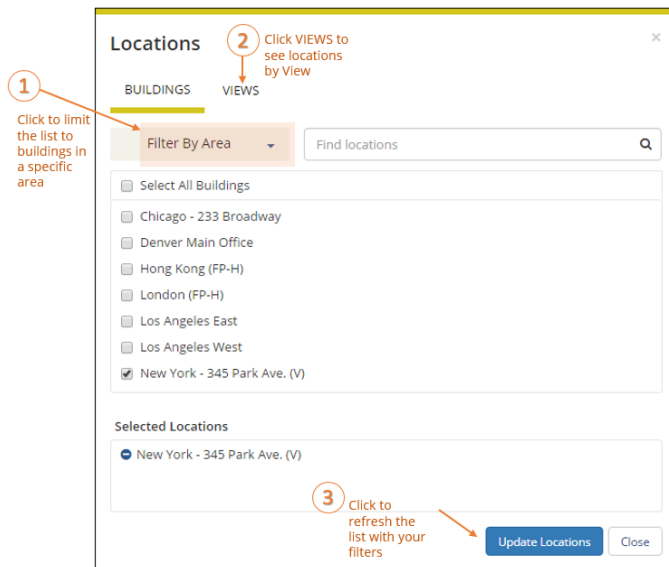
The EMS Web App LOCATIONS menu option helps you explore facilities and booked space, and is especially useful when you know which space you want and need to find time slots when the space is available. Once you have located an available time slot, you can click **CREATE A RESERVATION** from the main 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.

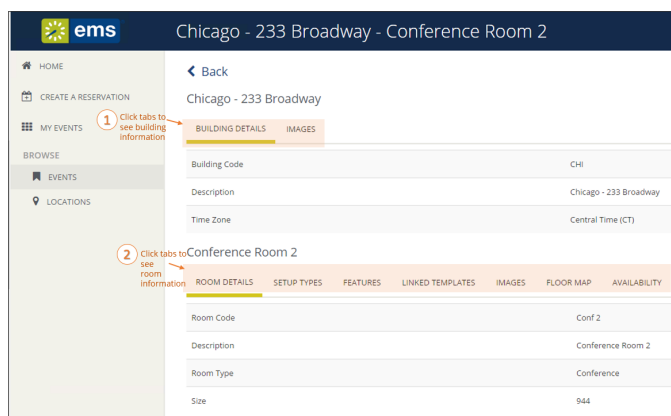


**Concept:** Filters along the top of the **Browse Locations** page enable you to quickly focus the view on rooms in a specific timeframe, and by room features such as equipment, room type, and geographic location. This helps you find available space to quickly meet your requirements. To add and remove 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. (For detailed booking instructions, see [Making Reservations](#)).



**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.







## Viewing Floor Plans

If your [administrator has associated floor plans with spaces](#) (which requires your organization to license and install the EMS Floor Plan Utility) when you browse for space by booking an event or viewing locations, you will see the floor plan icon next to the room. Click the floor plan to view visual details about the space.

ems

Room Request

New Booking for Thu Jun 30, 2016

Date & Time

Date

Thu 06/30/2016

Recurrence

Start Time

8:00 AM

End Time

10:00 AM

Create booking in this time zone

Eastern Time

Let Me Search For A Room

+

Locations

Add/Remove

New York - 345 Park Ave. (V)

Setup Types

Add/Remove

Classroom,Conference,U-Shape,Workspace

Room Types

Add/Remove

(all)

Features

Add/Remove

(none)

Number of People

1

Selected Rooms

Your selected Rooms will appear here.

Attendees

There was a problem accessing the Attendee services.

Room Search Results

LIST

SCHEDULE

FLOOR MAP

Favorite Rooms only.

Room

Location

Floor Plan

Rooms You Can Reserve

+

Collaboration Room 2

New York - 345 Park Ave. (V)


(none)

+

Collaboration Room 4


New York - 345 Park Ave. (V)

(none)

Collaboration Room 3


New York - 345 Park Ave. (V)

(none)

Collaboration Room 3

New York - 345 Park Ave. (V)

(none)

Conference Room 4


New York - 345 Park Ave. (V)

(none)

Rooms You Can Request

[https://success.emssoftware.com/EMS\\_V44.1/Using\\_EMS/Using\\_EMS\\_Web\\_App/020Browse\\_Menu/030\\_Browsing\\_Locations/](https://success.emssoftware.com/EMS_V44.1/Using_EMS/Using_EMS_Web_App/020Browse_Menu/030_Browsing_Locations/)

Updated: Thu, 16 Mar 2017 18:50:59 GMT

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## 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.

---



**Note:** Previous releases of EMS called this "Locate a group."

- **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.

---



**Tip:** If your Administrator has enabled it, a Floor Plan icon will appear for each event in this view. You can click this icon to open a floor plan for the selected building and view location details.





## Browse Events Page Overview

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, see [Viewing Your Events](#).

The screenshot shows the EMS 'Browse Events' interface. On the left is a navigation menu with options: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, LOCATIONS, and PEOPLE. The 'EVENTS' section is active. Below the menu is a 'Booking color key' with three categories: 'My new booking' (blue), 'My existing booking' (green), and 'Others' (grey). The main area displays a calendar for Thursday, May 5th, 2016. A table lists events with columns for START TIME, END TIME, EVENT NAME, LOCATION, and GROUP NAME. Annotations with arrows point to various features: 'View your reservations and bookings' points to the left menu; 'Filter your view' points to the date filter (Thu 05/05/2016); 'Save view filters for next time' points to the 'Save Filters' button; 'View an event' points to the event name 'Greek Affairs Conference'; 'View a Room' points to the location 'Student Union - Class 102'; and 'View a floorplan' points to the location 'Student Union - Conf 4'.

START TIME	END TIME	EVENT NAME	LOCATION	GROUP NAME
7:00 AM	12:45 PM	Greek Affairs Conference	Student Union - Class 102	Sigma Phi Epsilon
7:30 AM	5:30 PM	ERP Training	Johnson - J-310	Information Technology
7:30 AM	6:30 PM	Yearbook Portraits	Student Union - Conf 4	Student Affairs
8:00 AM	9:30 AM	Open Racquetball	Taylor Field House - Racquetball 1	Campus Recreation
8:00 AM	10:00 AM	Dance Practice	Performing Arts Center - Dance	Student Affairs
9:00 AM	3:00 PM	Shew's Health Fair	Student Union - Ballroom AB	Continuing Education Department
9:00 AM	3:00 PM	Shew's Health Fair	Student Union - Lobby	Continuing Education Department



## Event Details Page

To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.

EVENT DETAILS	
*Event Name	This is my event
Date	3/15/2016
*Event Time	7:00 AM - 8:30 AM MT
Reserved Time	7:00 AM - 8:30 AM MT
*Room	103
Group-X	24 Hour Fitness
1st Contact-X Name	Bob Anderson
1st Contact-X Phone	55
1st Contact-X Fax	555
1st Contact-X Email	<a href="mailto:24.com">

Add Event To Calendar

Add to your Outlook calendar

Close





## Making a Reservation in the EMS Web App



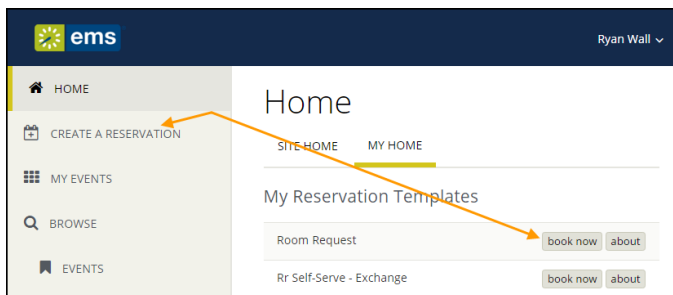
**Note:** For a conceptual overview, be sure to review:

- [Reservations, Bookings, and Booking Details](#)
- [Reservation & Bookings Structure](#)
- [Ways to Make Reservations](#)
- [Booking Templates](#)

You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the

book now

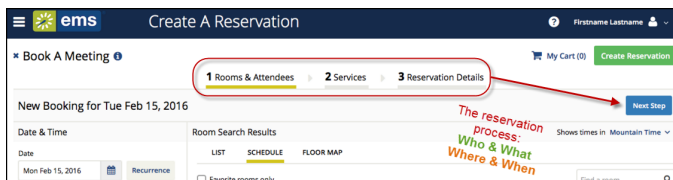
button next to one of your reservation templates (on the right).



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

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.

**See Also:** [Searching for Rooms](#)

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**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**.

Let Me Search For A Room	
Locations (all)	<a href="#">Add/Remove</a>
Floors (all)	<a href="#">Add/Remove</a>
Setup Types (no preference)	<a href="#">Add/Remove</a>
Room Types (all)	<a href="#">Add/Remove</a>
Features (none)	<a href="#">Add/Remove</a>

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.



Tip: See Also:

- [Booking Video Conferences](#)
- [Booking Multiple Rooms](#)

Then, skip to Step 7.

## Specify Who & What

4. In the Attendees area (near the center of the screen), specify headcount and attendees.

- *If your organization uses EMS for Outlook, you use the Attendees section to add or remove attendees and send them invitations or notifications. Attendees can be individuals, mailing lists or groups. To see who is in a mailing list or group, expand it. This feature lets you view attendees' availability and add or subtract them from the event.*
- *If your organization does not use EMS for Outlook, you see a list of EMS Web App users and groups but you do not see a calendar grid showing their availability.*



**Concept:** Adding attendees to an event is different than browsing people.

For detailed instructions on using the BROWSE PEOPLE option from the main menu.

**See Also:** [Searching for People](#).

**Tip:** If available, select a **Setup Type** (if available) for the reservation; this associates likely services and features with bookings.

6. Once you complete all required fields on this tab, click

**Next Step**

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. Your Administrator sets which services can be associated with a room and with an event type.

- 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**). The example below showing a workspace booking may differ from your administrator settings, such as catering options and billing.

**ems** Create A Reservation

Book A Workspace 1 Rooms & Attendees 2 **Services** 3 Reservation Details My Cart (1) Create Reservation

Services For Your Reservation [Next Step](#) [Skip Services](#)

**AV Denver (TEST)**

AV Items  
VTC  
Resource Technician

**Catering Denver (breakfast)**

Start Time: 3:00 PM End Time: 4:00 PM Service Type: Catering Delivery Estimated Count: 4

Do you have any special requests?

**Beverages**

Item	Price	Item	Price
Assorted Juices (serves 15)	\$20.00	Assorted Soda (serves 15)	\$20.00
Coffee Service (serves 15)	\$20.00	Juice - Single (serves 1)	\$1.25
Single Coffee Service (serves 1)	\$1.25	Water - Single (serves 1)	\$1.25

**Pastries**

**Catering Denver (Meals)**

Start Time: 3:00 PM End Time: 4:00 PM Service Type: Catering Delivery Estimated Count: 4

Do you have any special requests?

☐ I have read and agree to the EMS catering terms and conditions.

**Beverages/Snacks**  
**Lunch Items**  
**Equipment**

**Notes**

**Billing Information**

Billing Reference: PO Number:

- 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.

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.

---



**Concept:** EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS plugin icon in your Outlook application. You will also see additional features and functionality in EMS. Further, anywhere that you see people or groups in EMS, you will have access to everyone in your organization's email database (which is stored in Exchange Server). This means that you can see people's availability (Out of Office, Busy, In a Meeting, etc.), send them email invitations or notices, and add EMS events to your Outlook calendar.



ems

Create A Reservation

First Name Last Name

Book A Workspace

1 Rooms & Attendees

2 Services

3 Reservation Details

My Cart (1)

Create Reservation

Reservation Details

Event Details

Event Name \*

Ryan's workspace for Jan 12, 2016

Event Type \*

Hotelling

Comment

Calendar Details

Subject

Ryan's workspace for Jan 12, 2016

Show Time As

Free

Reminder

None

Message

☐ Private

Requestor Details

Group/Employee \*

First Name Last Name

First Contact \*

First Name Last Name

Second Contact

First Contact Phone

111-222-3333

First Contact Mobile

First Contact Email Address \*

email@domain.com

Attendee Attachment

Participant Instructions.docx - 100%

Attach A File

Only one attachment can be sent to attendees per reservation.

Reservation Attachments

User Testing In Progress Sign.pdf - 100%

Attach A File

Billing Information

Billing Reference

PO Number

☐ Add this reservation to my calendar.

☐ I have read and agree to the terms and conditions.

Save Reservation Details





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## Ways to Make Reservations

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

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### 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. Create a Reservation

Click **CREATE A RESERVATION** from the main menu. Then select a template to streamline the booking process and browse for available time slots and rooms.

---

### 3. 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.

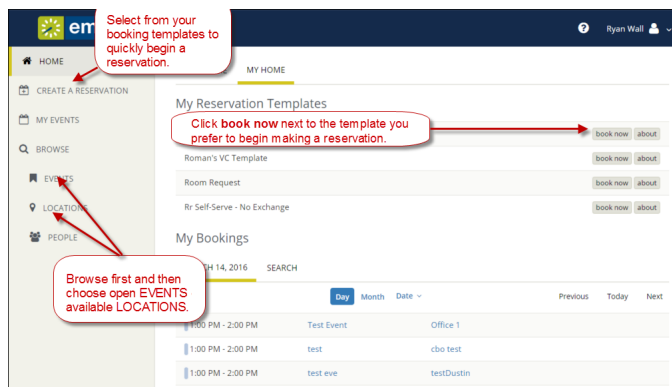
---

### 4. 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 in your organization, 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.

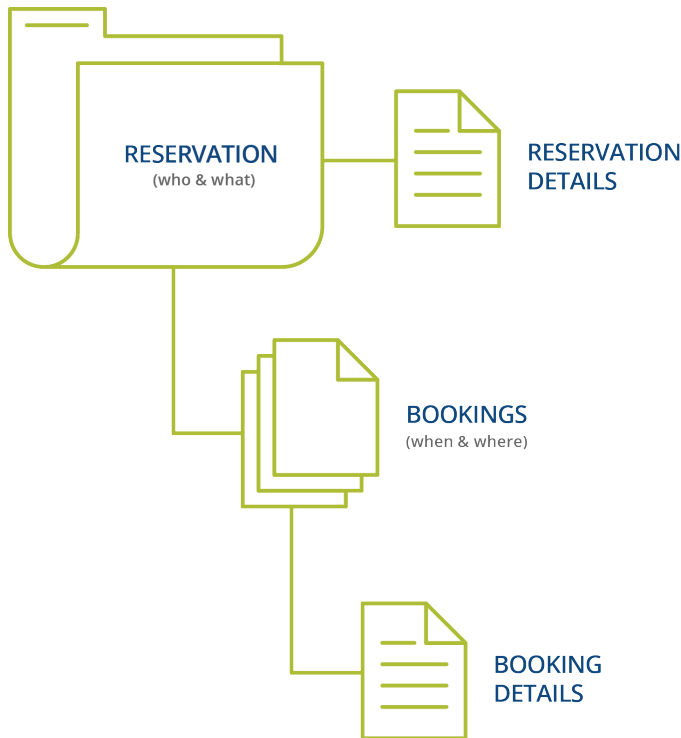
## The Reservation Process: Who & What, Where & When

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).



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## 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.

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**See Also:** [Adding Services](#)

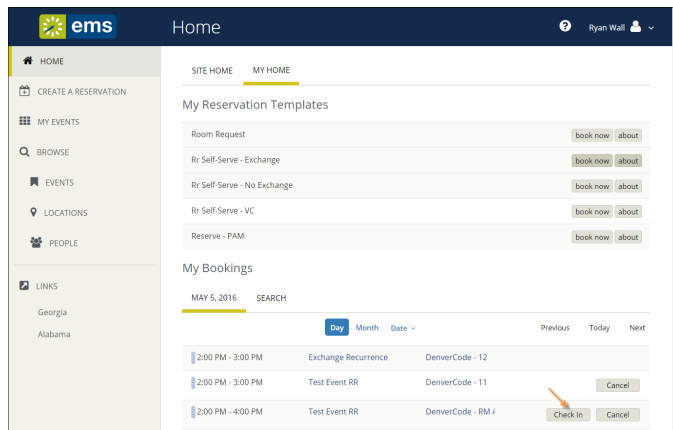




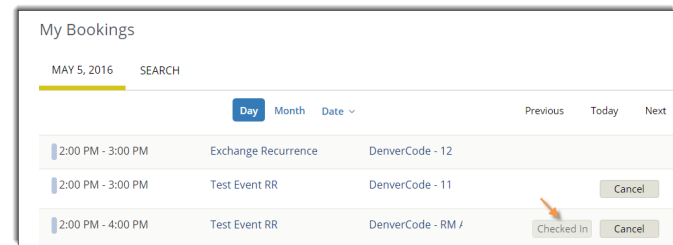
## Checking In To Events

You can check in to your events in the MY EVENTS area on the EMS Web App main menu.

1. Click the **Check In** button next to the event (when available). Your Administrator sets a time limit on how soon you can check in before an event.



2. Once you have checked in to confirm your attendance, the booking shows on your MY HOME tab as Checked In.



**Note:** The Booking Level Check-In Role must be enabled in EMS Web App by your Administrator by adding the Check In/Check Out Role to a Web Security Template.

**Note:** In Version 44.1, several functions that were available in previous releases are no longer available, including: Building level Check-in/Check-out, check in a group via the Locate Group web menu, and the Check In/Check Out web menu.



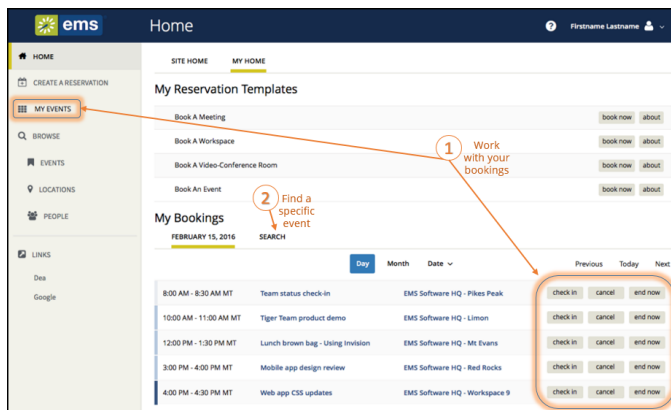


## Viewing Your Events

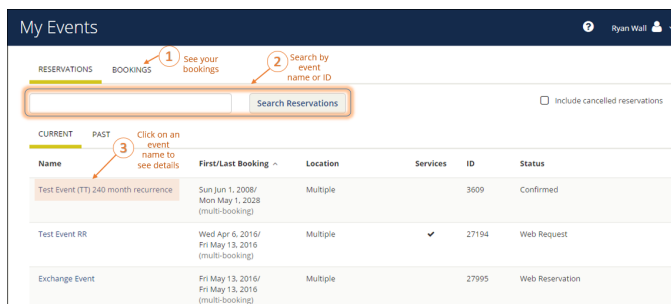


**Important:** The VIEW EVENTS option is different than the BROWSE EVENTS option in the main menu. To learn more, see [MY EVENTS vs. BROWSE EVENTS](#).

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. To learn more, see [Making Reservations](#).

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.

The screenshot displays the 'My Events' page in the EMS web application. The page is divided into two main sections: 'RESERVATION DETAILS' and 'Bookings'.

**RESERVATION DETAILS:**

- Event Name:** Workout
- Event Type:** Recreation
- Group:** Charity Dominic
- 1st Contact Name:** (none)

**Bookings:**

- Current Booking:** Thu May 12, 2016, 12:00 PM - 1:00 PM, MT, Taylor Field House - Gymnasium - All, 16, As Is/Standard, Web Request.
- Past Bookings:** Thu May 19, 2016, 12:00 PM - 1:00 PM, MT, Taylor Field House - Gymnasium - All, 16, As Is/Standard, Web Request; Thu May 26, 2016, 12:00 PM - 1:00 PM, MT, Taylor Field House - Gymnasium - All, 16, As Is/Standard, Web Request; Thu Jun 2, 2016, 12:00 PM - 1:00 PM, MT, Taylor Field House - Gymnasium - All, 16, As Is/Standard, Web Request.

**Annotations:**

- 1:** Edit Reservation Details (link)
- 2:** Work with the reservation (link)
- 3:** See room details (link)
- 4:** Add another booking to this reservation (link)





## 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 the right. You can view expanded Room Details by clicking on the room name, and you can view any available floorplans by clicking on the room name to it.

Locating space as part of the reservation process is different than simply browsing locations. For detailed instructions on the LOCATION options in the main menu, see [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.

The screenshot shows the EMS booking interface. At the top, there are tabs for '1 Rooms & Attendees', '2 Services', and '3 Reservation Details'. A 'My Cart (4)' button and a 'Create Reservation' button are visible. Below the tabs, there is a 'Selected Rooms' section with a list of rooms: 'Conference Room 1', 'Collaboration Room 2', 'Innovation Lab 2', and 'Conference Room 3'. A 'Next Step' button is next to this list. Below the 'Selected Rooms' section, there is an 'Attendees' section with a message: 'There was a problem accessing the Attendee services.' Below the 'Attendees' section, there is a 'Room Search Results' section with tabs for 'LIST', 'SCHEDULE', and 'FLOOR MAP'. A 'Find A Room' search bar and a 'Search' button are present. Below the search bar, there is a table titled 'Rooms You Can Reserve' with columns: Room, Location, Floor, TZ, Cap, and Match. The table contains four rows of room information. A red box highlights the 'Add' button (a plus icon) in the first row of the table. A red arrow points from the 'Add' button to the 'My Cart (4)' button, with a label '2 Rooms show here and in your cart'. Another red arrow points from the 'Add' button to the 'Add multiple rooms' text, with a label '1 Add multiple rooms'.

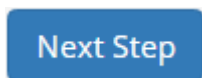
Room	Location	Floor	TZ	Cap	Match
Conference Room 1224	Hong Kong (FP-H)	(none)	HKT	10	
Collaboration Room 2	New York - 345 Park Ave. (V)	(none)	ET	60	
Collaboration Room 4	New York - 345 Park Ave. (V)	(none)	ET	30	
Conference Room 1	Los Angeles West	7th Floor	PT	15	

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

The screenshot shows the 'Attendance & Setup Type' dialog box. It contains the following fields and buttons:

- No. of Attendees:** A text input field with the value '1'. A red arrow points to it with the label '1 Enter headcount'.
- Setup Type:** A dropdown menu with 'Conference' selected. A red arrow points to it with the label '2 Pick a setup type'.
- Buttons:** 'Add Room' and 'Cancel' buttons. A red arrow points to the 'Add Room' button with the label '3 Book the room'.

2. Click



to continue with the booking process.



## Booking Recurring Meetings



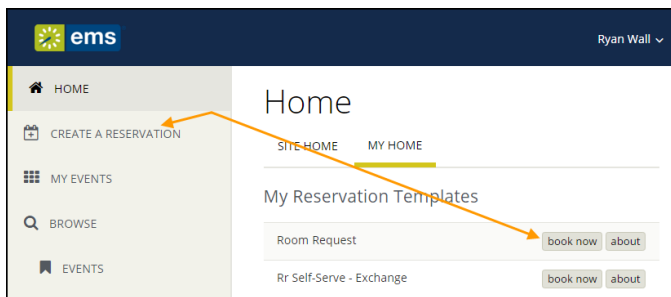
**Note:** For a conceptual overview, be sure to review:

- [Ways to Make Reservations](#)
- [Reservation & Bookings Structure](#)

You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the

book now

button next to one of your reservation templates (on the right).

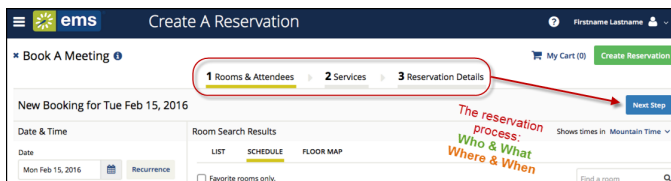


Next, the Create a Reservation screen launches, where EMS Web App will lead you through the reservation process.

Enter your information (including all required fields) and click

Next Step

to advance through the process.







## Specify When & Where


1. To specify **When**, select dates and times.
2. Click the **Recurrence** button.




New Booking for Thu May 5, 2016

Date & Time	Selected Rooms
<p>Date Thu 05/05/2016  <b>Recurrence</b></p> <p>Start Time 12:00 AM </p> <p>End Time 1:00 AM </p> <p>Create booking in this time zone Mountain Time </p>	<p>Your selected Rooms will appear here.</p> <p>Room Search Results</p> <p>Rooms matching your search criteria will appear here.</p>

- 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** 


Repeats Daily  Remove Recurrence

☒ Every 1 day(s)

☐ Weekdays Only



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Start Date Thu 05/05/2016 

☒ End Date Fri 05/06/2016  (2 occurrences)

☐ End after 1 occurrence(s)

---

Start Time 12:00 AM  End Time 1:00 AM 

Create Booking In Mountain Time 

Apply Recurrence Close

- b. Click **Apply Recurrence**

**Apply Recurrence**

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. For detailed instructions on using the BROWSE LOCATIONS options in the main menu, see [Searching for Rooms](#).

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



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

- 

## Specify Who & What

- In the Attendance area (near the center of the screen), select a **Setup Type** (if available) for the reservation from the dropdown.

- 
- 
- Specify headcount and attendees in the Attendance area.
  - If your organization has implemented EMS for Outlook*, you use the optional Attendees section to add or remove attendees and send them invitations or notifications. Attendees can be individuals or mailing lists or groups. To see who is in a mailing list or group, simply expand it. This optional feature enables you to view attendees' availability and add or subtract them from the event.
  - If your organization has not implemented EMS for Outlook*, you will see a list of EMS Web App users and groups but you will not see availability.



**Concept:** Adding attendees to an event is different than browsing people.

For detailed instructions on using the BROWSE PEOPLE option from the main menu.

See Also: [Searching for People](#).

- Once you have completed all required fields, click



Next Step

in the upper right corner.

---

## Choose Services

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**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.

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.

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## Add Reservation Details

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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.



**Concept:** EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS plugin icon in your Outlook application. You will also see additional features and functionality in EMS. Further, anywhere that you see people or groups in EMS, you will have access to everyone in your organization's email database (which is stored in Exchange Server). This means that you can see people's availability (Out of Office, Busy, In a Meeting, etc.), send them email invitations or notices, and add EMS events to your Outlook calendar.









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## Booking a Video Conference Room

Typically, video conference bookings involve at least two Rooms: the "host" Room where the meeting host user is located, and at least one more additional Room where other attendees gather to participate. If you begin a Reservation or Booking using a video conferencing process template, you will be prompted during the booking process to confirm which one of your Rooms is the Host. The first Room you select will be automatically selected as the Host, but you can change the Host to a different Room once that additional Room is selected. You can select only one Room per Building. You can also specify a different headcount for each Room.

---



**Tip:** You may need to add multiple meeting Rooms, including the Host, to the Reservation.

If all participants including the host gather in the same Room, however, you will only need one Room; simply designate this sole Room as the Host.





## Adding Reservation Details

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.

The screenshot shows the EMS My Events page. The top navigation bar includes the EMS logo and the text 'My Events'. Below this, the page is divided into two main sections: 'RESERVATION DETAILS' and 'ATTACHMENTS'. The 'RESERVATION DETAILS' section contains a table with the following information:

Event Name	Workout
Event Type	Recreation
Group	Charity Dominic
1st Contact Name	(none)

Below the reservation details, there is a 'Bookings' section. It includes a 'CURRENT' tab and a 'PAST' tab. The 'CURRENT' tab is active, showing a table of bookings. The table has columns for Date, Start Time, End Time, Time Zone, Location, Attendance, Setup Type, and Status. The first booking is for Thursday, May 12, 2016, from 12:00 PM to 1:00 PM, at Taylor Field House - Gymnasium - All, with an attendance of 16, setup type of As Is/Standard, and status of Web Request. There are three more bookings listed below it, all for the same date and time, location, attendance, setup type, and status.

Annotations on the screenshot include:

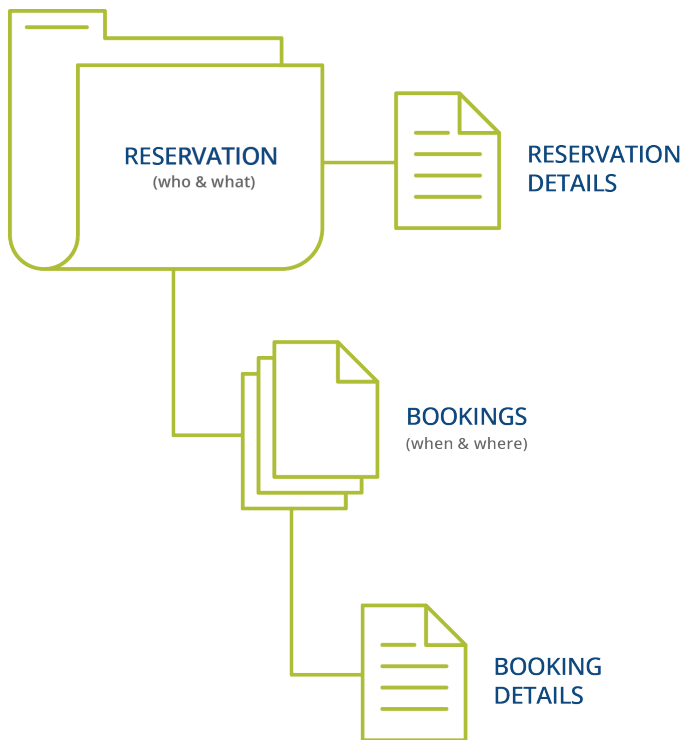
- 1. A red box around the 'Edit Reservation Details' link in the 'RESERVATION DETAILS' section.
- 2. A red box around the 'Work with the reservation' link in the 'ATTACHMENTS' section.
- 3. A red box around the 'See room details' link in the 'Bookings' section.
- 4. A red box around the 'Add another booking to this reservation' link in the 'Bookings' section.

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).





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## 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.

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**See Also:** [Adding Services](#)



**Tip:** You may be able to see floorplans for rooms. **See Also:** [Viewing Floorplans](#)

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## Reservation Tasks

Use the **Reservation Tasks** area to take available actions on this event:

Reservation Task	What You Can Do
Booking Tools	
Cancel Reservation	Cancel the reservation.



Reservation Task	What You Can Do
<b>View Service Availability</b>	Opens a Service Availability window where you can choose from allowable booking templates to add services.
<b>Send Invitation</b>	Sends invitations to recipients you specify.
<b>Add to my Calendar</b>	Adds the reservation and all its bookings to your personal (Outlook) calendar.


## 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).

## Bookings for the Reservation

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.

Action	Result
 <b>Cancel Booking</b>	Cancel selected bookings for the reservation.
<b>Attendance</b>	Booking headcount.
<b>Setup Type</b>	Setup Types are defined by your Administrator, and define which services, resources, and room types can be used for the booking.
<b>Status</b>	Stage in the booking process for the booking, such as Requested, Reserved, Pending.





## Adding Services to a Meeting

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 (this option is only available if your Administrator allows it for this type of meeting and for your user profile).

The screenshot shows the 'My Events' page for a reservation titled 'Meeting about music' (ID: 2824823). The 'RESERVATION DETAILS' tab is active, showing fields for Event Name, Event Type, Group, and 1st Contact Name. A 'Reservation Tasks' menu is open on the right, with 'Add Services' highlighted. Below the details, there's a 'Bookings' section with a table showing a booking for 'Bentleyville - Beau Terre Office Park - 11 Training Room' on 'Fri Mar 17, 2017' from 1:30 PM to 8:00 PM. A warning message at the bottom states: 'Warning: Booking in conflict status or had a resource quantity reset View Services | Manage Services'.



**Tip:** Once you have added services and reserved space, you can [work with services](#) by clicking **Manage Services**.

The screenshot shows the 'Manage Services' page for the same reservation. The 'Attendees' section is on the left, and the 'Services Summary' is on the right. The 'Services Summary' lists several services added to the meeting, including 'CAN - Calgary - Request Portable Projector' and 'CAN - Calgary - Request Portable Projector - Unit 1'. A 'Notes' section at the bottom contains the text 'Plug in the projector so it has time to warm up.' and a 'Save Changes' button.

3. The first screen shows attendees and any existing services for the meeting and click on services you wish to add from the list of available options.



- 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.

- 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.

- 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.

	Date	Booking Time	Time Zone	Location	Event Name	Event Type	Result
<input checked="" type="checkbox"/>	Fri Mar 17, 2017	1:30 PM - 8:00 PM	Central Time	BT - 111 Training	Meeting about music	Community	

- You return to the Reservation page and a confirmation appears briefly confirming your changes.









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## Working with Services

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### [Adding Services to a New Reservation](#)

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#### **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.

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**Note:** If you are using the EMS Web App on a mobile device, you will not have access to this feature.

**See Also:** [Categories, Resources, and Services: What's the Difference?](#)

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.

## Changing or Canceling Services for an Existing Reservation

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.

The screenshot shows the 'My Events' page for an event titled 'Meeting about music beginning Mar 17, 2017 (2824823)'. It includes tabs for 'RESERVATION DETAILS' and 'ATTACHMENTS'. Under 'RESERVATION DETAILS', there's a section for 'Edit Reservation Details' with fields for Event Name, Event Type, Group, and 1st Contact Name. To the right, 'Reservation Tasks' includes links like 'Add Services', 'Cancel Services', 'Booking Tools', 'Cancel Reservation', 'View Reservation Summary', 'View Service Availability', 'Send Invitation', and 'Add to My Calendar'. Below this is a 'Bookings' section with 'CURRENT' and 'PAST' tabs. A table lists bookings with columns for Date, Start Time, End Time, Time Zone, Location, and Status. One booking is listed for 'Fri Mar 17, 2017' from '1:30 PM' to '8:00 PM' at 'Bentonville - Beau Terre Office Park - 11 Training Room 20 person' with a status of 'Confirmed'. A warning message at the bottom states: 'Warning: Booking in conflict status or had a resource quantity reset. View Services | Manage Services'. An arrow points to the 'Manage Services' link.

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.

The screenshot shows the 'Manage Services' page for the same event. It includes a 'Manage Services' header and a 'Reservation Details' button. Below is a 'Services Summary' section. On the left, there are tabs for 'Attendees' and 'CAN-Calgary-AV/Resources'. The 'Attendees' tab shows a list of attendees with columns for Name, Company N., Email Address, Phone, and Visitor. The 'CAN-Calgary-AV/Resources' tab shows a list of resources with columns for Start Time, End Time, and Service Type. The 'Services Summary' panel on the right lists services with columns for Service Name, Quantity, and Price. An arrow points to the minus sign icon next to the first service item, 'CAN-Calgary-AV/Resources, 1:30 PM - 8:00 PM, CAN-AV'.



**Note:** The event type and the booking status (as well as your Administrator settings) affect whether the **Manage Services** option is available.





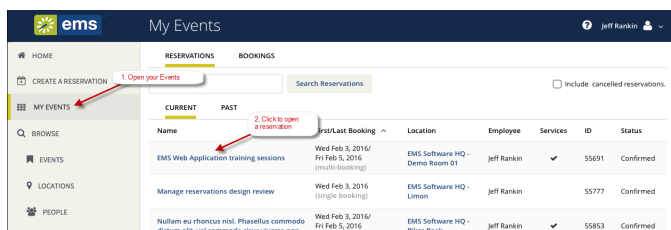


## Canceling Your Reservations and Bookings

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.

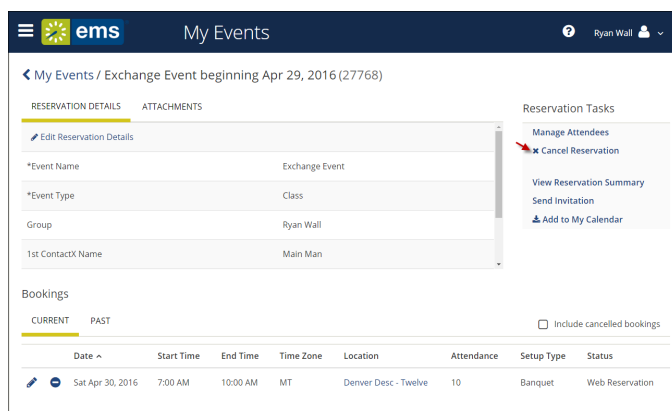
### Canceling Reservations

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.



**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.

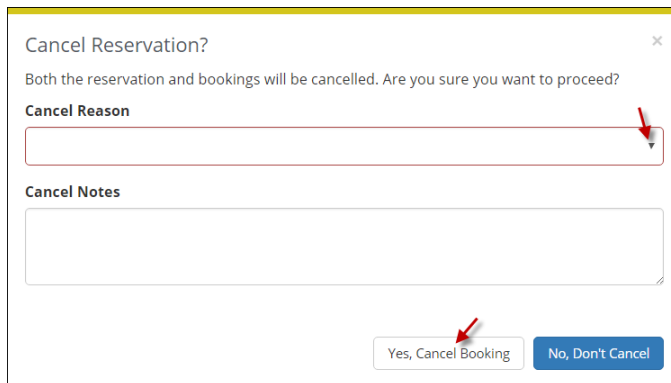
2. From the [Reservation Details](#) page, click **Cancel Reservation**.



**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.



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

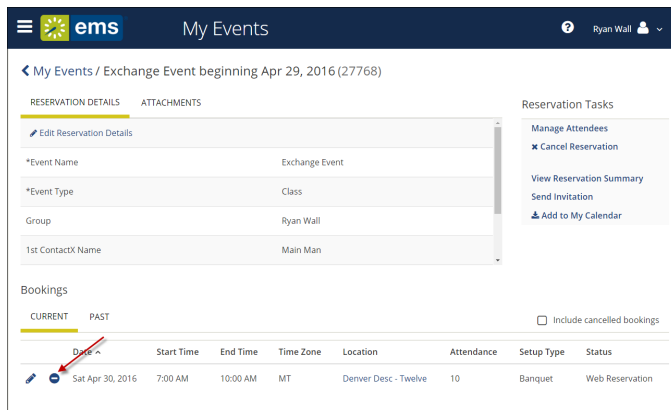
---

## Canceling Bookings

1. From the [Reservation Details](#) 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).



**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



Cancel Booking?

Saturday, April 30, 2016, from 8:00 AM to 9:00 AM

Exchange Event

Denver Desc - Twelve

Cancel Reason

Cancel Notes

Yes, Cancel Booking

No, Don't Cancel

Your MY EVENTS page refreshes and the booking is canceled.



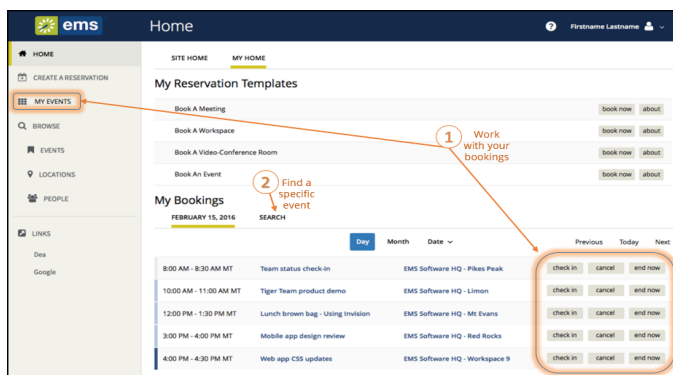


## Changing Reservations and Bookings

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 [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.

## Changing 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 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.





**My Events**

Charity Dominic

< My Events / Workout beginning May 11, 2016 (74984)

**RESERVATION DETAILS** ATTACHMENTS

[Edit Reservation Details](#)

Event Name: Workout  
Event Type: Recreation  
Group: Charity Dominic  
1st Contact Name: (none)

**Bookings**

CURRENT PAST

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

☐ Include cancelled bookings

**Reservation Tasks**

[Booking Tools](#)  
[Cancel Reservation](#)  
[View Service Availability](#)  
[Send Invitation](#)  
[Add to My Calendar](#)

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 12, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 19, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 26, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu Jun 2, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request

[New Booking](#)

**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).

**My Events**

Charity Dominic

< My Events / Workout beginning May 11, 2016 (74984)

**RESERVATION DETAILS** ATTACHMENTS

[Edit Reservation Details](#)

Event Name: Workout  
Event Type: Recreation  
Group: Charity Dominic  
1st Contact Name: (none)

**Bookings**

CURRENT PAST

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

☐ Include cancelled bookings

**Reservation Tasks**

[Booking Tools](#)  
[Cancel Reservation](#)  
[View Service Availability](#)  
[Send Invitation](#)  
[Add to My Calendar](#)

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 12, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 19, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 26, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu Jun 2, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request

[New Booking](#)

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.





## Inviting Attendees with Outlook®

If your organization has deployed EMS for Microsoft Outlook, you can check attendees' availability as shown in Outlook. EMS automatically sends meeting [invitations](#) to attendees when you make a reservation in EMS Web App.

### 1. Begin [creating a reservation](#).



**Note:** Because EMS Web App is highly configurable, options that we show in the following procedure may not be present in your organization's implementation of EMS. Also, your organization may have customized some labels; for example, “group” may be “client,” “employee,” or “department”; “event” may be “Meeting,” and so on. Required fields are marked with a red asterisk (\*).

### 2. When you select attendees, the Create a Reservation window will show their availability in a calendar grid.



**Concept:** Depending on how your Administrator has configured EMS Web App templates, you might see different fields displayed, or you might not see some of these fields displayed at all.

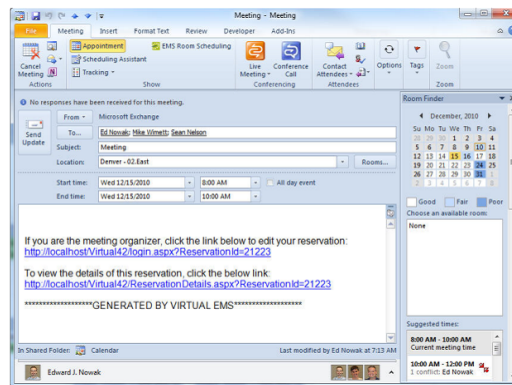
### 3. Once you have completed the reservation and clicked

**Create Reservation**

, attendees will receive invitations based on the booking template you used. Changes you may make to the event will also trigger email updates.

[Example of an automatically generated email:](#)







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## Sending Notifications

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### 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.

If your EMS Web App implementation uses the [Integration with Exchange](#), you can handle notifications using Outlook.

---



### 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.

Former releases of EMS software referred to this feature as Plan-a-Meeting (PAM).

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### Concept: Confirmations vs. Notifications, What's the Difference?

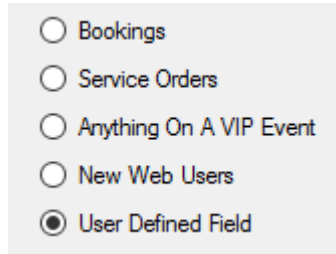
#### Confirmations

- 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:



☐ Bookings

☐ Service Orders

☐ Anything On A VIP Event

☐ New Web Users

☒ User Defined Field

- 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.



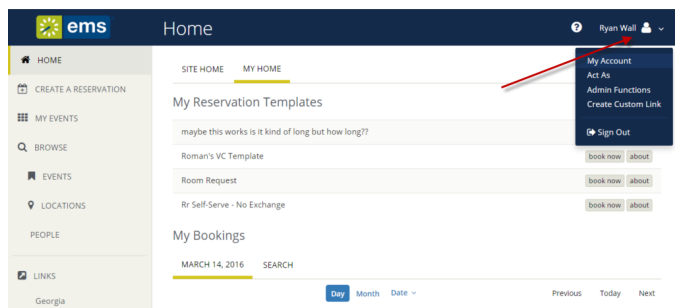


## Personalizing Your Account

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

- Specify *delegates*. Delegates are web users who can act as you in EMS Web App and carry out actions on your behalf.
- 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](#).



To get started customizing your account, see:

- [Creating a User Account](#)
- [Modifying your User Account](#)
- [Creating Delegate Accounts](#)
- [Setting Default Values for Room Requests and Reservations](#)
- [Creating a List of Favorite Rooms](#)

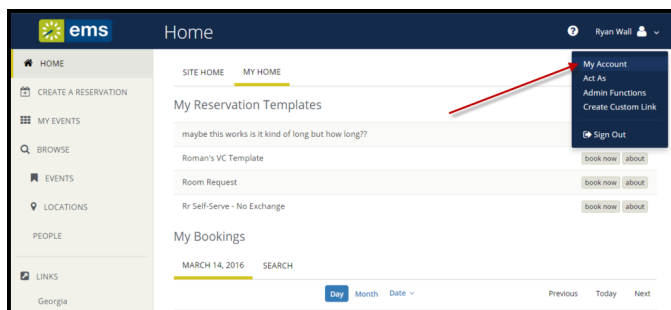




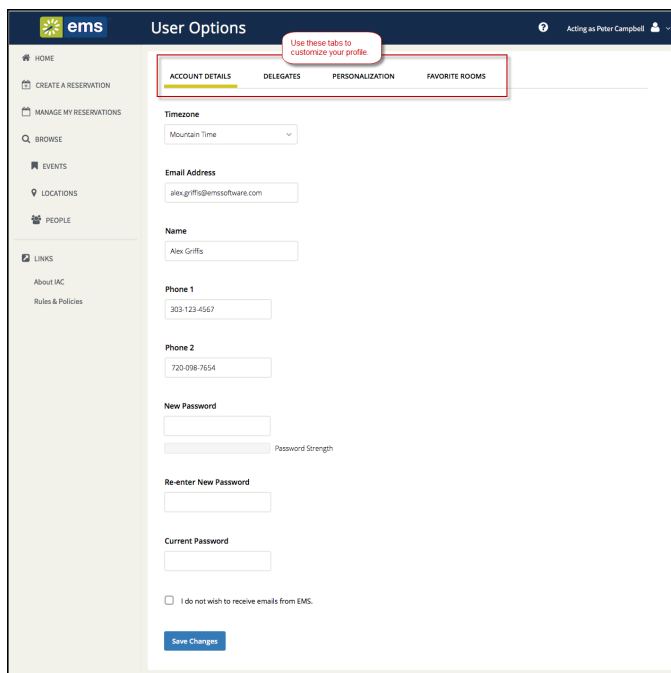
## Changing Account Information

Under My Account, you can change your email address, name, phone number, fax number, time zone, and password. You can also personalize your EMS experience by setting default values for your templates and choosing favorite rooms. These are described on other pages.

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. The Account Details tab contains basic account information.



2. To modify your basic user account information:

- Modify any account information as needed—your email address, name, phone number, and so on.
- 



**Note:** If you log into EMS Web App and then change your email address, keep in mind that this new email address the one you must now use for logging in.

- If you wish to change your password, enter a new password in the **New Password** field, and then enter the same password again in the **Re-Enter New Password** field. Lastly, enter your **Current Password**.
- You can click the **I do not wish to receive emails from EMS** option (if available) to opt out of automatic emails from EMS Web App, such as reminders, reservation summaries (which EMS sends when you submit your reservation), and notices (which EMS sends when you modify your account).

3. Click **Save Changes**.

4. To further customize your EMS Web App account, see:

- [Creating Delegate Accounts](#)
- [Setting Default Values for Room Requests and Reservations](#)
- [Creating a List of Favorite Rooms](#)







## Establishing Delegates

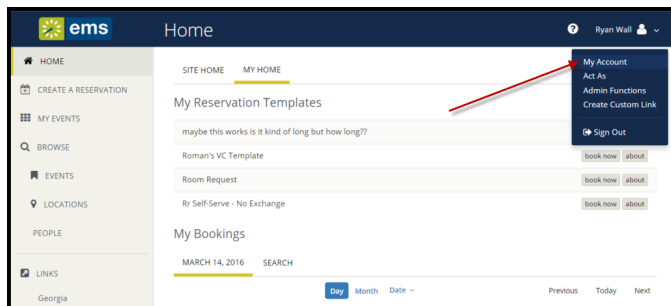
You may wish to designate another EMS Web App user to make reservations and room requests and so forth on your behalf. You may need to do this, for example, to get someone else to handle your EMS work during your absence.

You begin by adding one or more EMS users to act as your delegate. Then they can log in and request to "Act As" you. You can keep track of their actions on your behalf, and any event invitations, cancelations, changes, room requests, service requests, and so on that they create on your behalf will appear to other EMS users as yours.



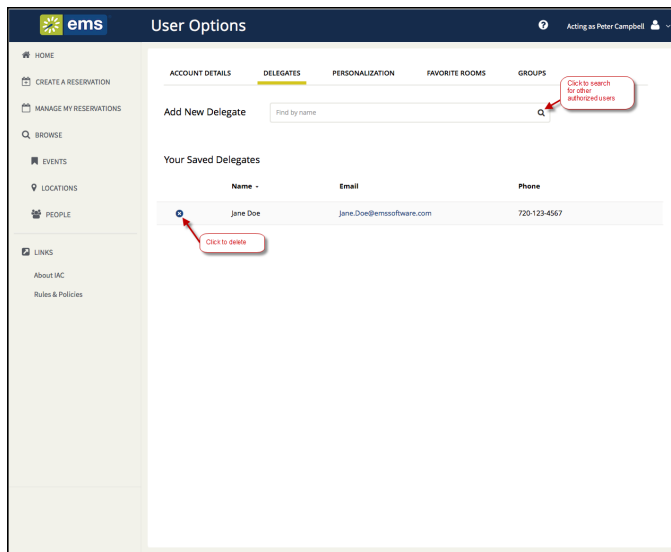
**Concept:** A *delegate* is another authorized user who can act as you in EMS Web App and carry out actions on your behalf. To delegate users, first you add them to your account as delegates under My Account. Then they can use the **Act As** option and select your name.

1. Open the My Account option from the upper right corner of EMS Web App.



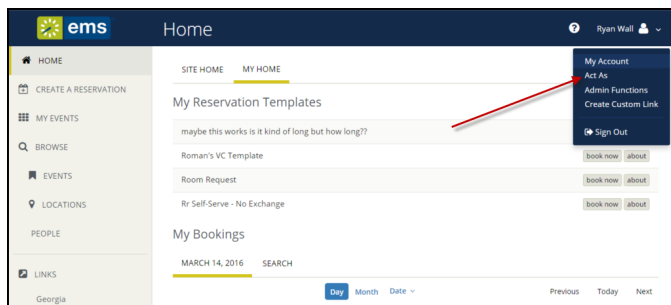
1. Click the **DELEGATES** tab and add your delegates.



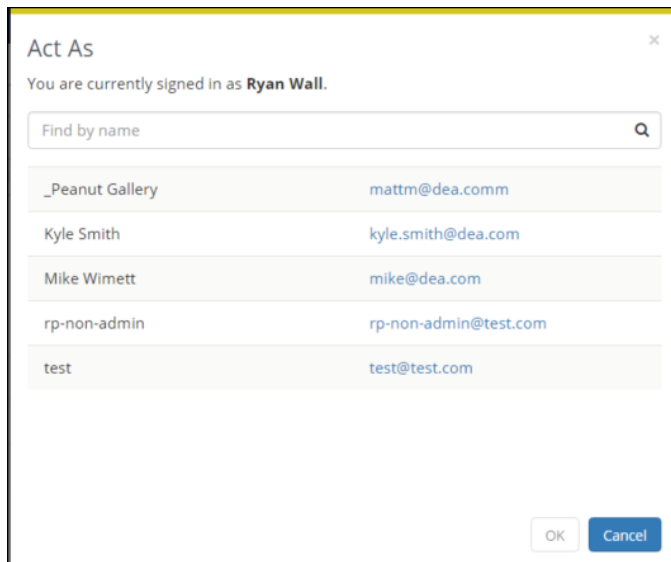


2. For the EMS Web App user who will act on behalf of another:

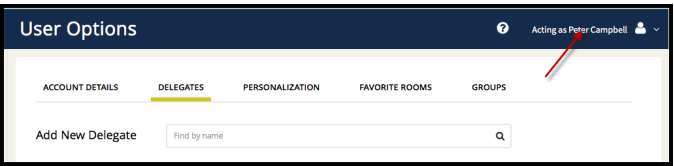
From the **MY ACCOUNT** dropdown, you must click **Act As**.



In the popup, select which user you're going to act as and click **OK** to confirm.



Once activated, the user you're act as will show in the upper right corner of the EMS Web App, like this:





## Establishing Booking Templates

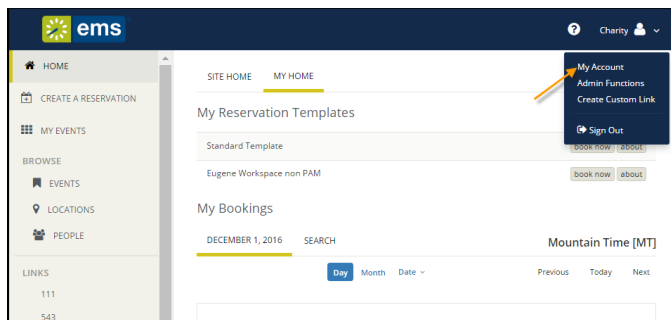
You can personalize booking templates to streamline your process for requesting rooms and making reservations (depending on your permissions). These templates appear on your personal EMS Web App home page after you save them.



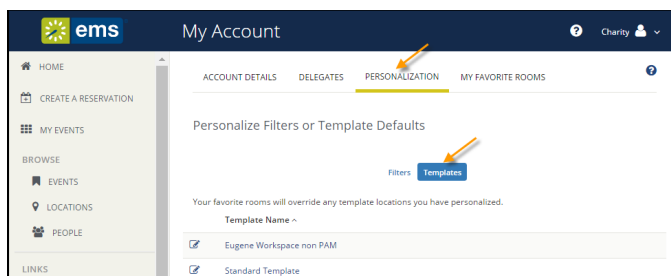
**Concept:** Learn more about how booking templates work:

[Booking Templates, Requests, and Reservations](#)

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.



My Account

Personalize Filters or Template Defaults

Filters

Templates

Your favorite rooms will override any template locations you have personalized.

Template Name ^

Eugene Workspace non PAM

Standard Template

Personalization Options

Standard Template

Start Time

11:30 AM

End Time

Display Results As

List

Schedule

Floor Map

Locations

Denver

Add/Remove Locations

☐ Override location and time zone settings when I search for available space

Floors

(all)

Add/Remove Floors

Room Types

(all)

Add/Remove Room Types

Time Zone

Mountain Time

Setup Type

Any (No Preference)

Event Name

Event Type

Save Changes

3.

**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**.

[https://success.emssoftware.com/EMS\\_V44.1/Using\\_EMS/Using\\_EMS\\_Web\\_App/040Customizing\\_My\\_Account/040\\_Setting\\_D](https://success.emssoftware.com/EMS_V44.1/Using_EMS/Using_EMS_Web_App/040Customizing_My_Account/040_Setting_D)

Updated: Thu, 16 Mar 2017 18:51:00 GMT

Powered by mindtouch™

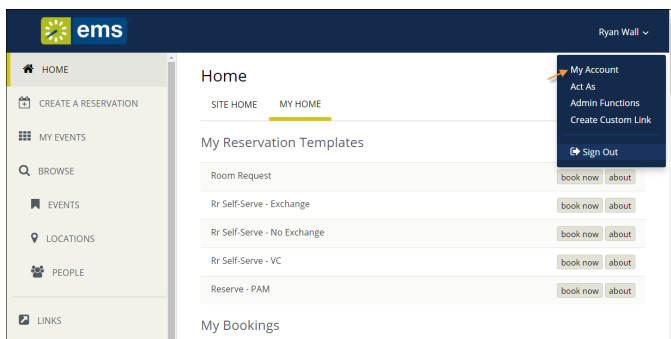
69



## Favoriting Rooms

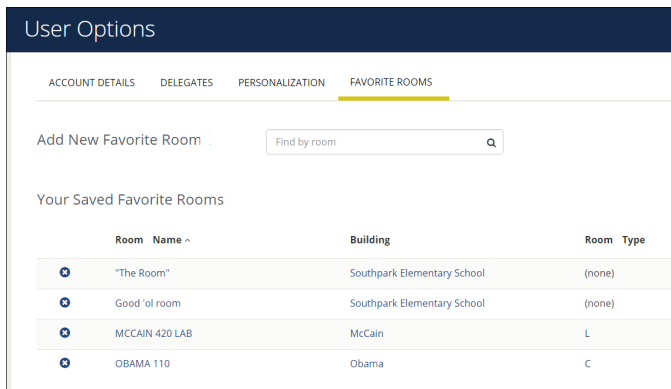
Under My Account, you can create a list of favorite rooms. This streamlines the process of searching for available space when you request or reserve rooms.

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.



User Options

Account Details Delegates Personalization **FAVORITE ROOMS**

Add New Favorite Room

Peak

Dragon Peak - 1050 Pinehurst - 24th Floor - ET

Pikes Peak - 1050 Pinehurst - 24th Floor - ET

Your Saved Favorite Rooms

Room Name	Building	Floor	Room Type
You don't have any favorite rooms saved. Search above to add a room.			

Search results 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.





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## Mobile Web App

EMS Web App is available both in a desktop client version and in a mobile version. If you access EMS Web App from a mobile device, you are redirected to the mobile version of EMS Web App.

- [Using the EMS Web App on Mobile Devices](#)
- [EMS Mobile App Versus EMS Mobile Web App: What is the Difference?](#)

**See Also:** [Using the EMS Web App on Mobile Devices](#)



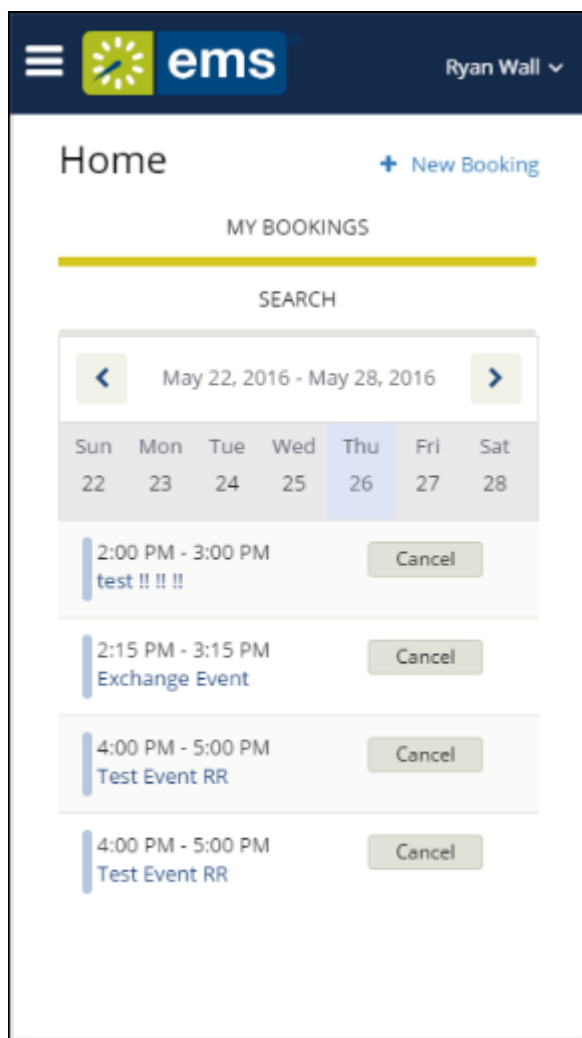




## Using the EMS Web App on Mobile Devices

If you access EMS Web App from a mobile device such as a tablet or smartphone, the application will look slightly different because of the limitations of the device. In general, dropdowns and menu bars will be reduced or abbreviated, and you will need to click to expand some regions and scroll to view some information.

*Example of the EMS Web App on a mobile device*



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## Quick Tasks

Click on **Home** at any time to return to the Mobile EMS Web App Home page (where you can always see My Events).

Click on **My Events** to open a page on which you can view "My Events" (your reservations and bookings).

Click on **an event name** to see details.





Click on **New Booking** to begin making a new booking.

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## Icons to Remember

### Icons on the Mobile EMS Web App Home page

Icon	Description
	Main menu for navigating EMS Web App.
	Click to change information.
	Click to see a calendar view.
	Click to add or remove an item.

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## What is the Difference?

The following features of the EMS Web App on mobile devices are different than on a standard computer web browser.

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**Concept:** In general, the mobile display focuses on "doing" rather than "viewing." For example, you can easily book a room or check in to a meeting, but exploring reservations with hundreds of intricate bookings or







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## EMS Mobile App Versus EMS Mobile Web App: What is the Difference?

Although their names are similar and they share the same databases, these products have very different applications.

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### EMS EMS Mobile = EMS Application for Mobile Devices

This is a separate software application EMS produces specifically to run on mobile devices such as smartphones.

#### Features of EMS Mobile (Which are Not in EMS Web App)

- Ultra-compact display designed for smartphones
  - Two factor authentication method
  - QR Code functionality
- 

### EMS Mobile *Web* App = EMS Web App on a Mobile Browser

This is the EMS Web App as it displays when running on a web browser on a mobile device, such as a tablet.

#### Features of EMS Web App (Which are Not in EMS Mobile)

- Browse Events
- Browse People
- Act As (delegation feature)
- Edit Account Details
- Edit Delegates
- Edit Everyday User Process templates





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## 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. For more guidance, try [Browsing Events, Locations, and People](#).

- **Why can't I make a reservation?**

Several settings control your capabilities as a user. For a deeper understanding, learn about [Booking Templates, Requests, and Reservations](#).

- **Why are some options not available to me?**

This is probably because of settings controlled by your Administrator. For more detail about these settings, learn about [Everyday User Templates](#).

- **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](#). If you have Outlook, you can view people's availability in a calendar view during the booking process.

- **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.

- **Where do I find video tutorials?**

- [Web App: Booking a Meeting](#)
- [Web App: Booking a Workspace](#)
- [Web App: Booking a Room With Catering and User Defined Fields](#)





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## Booking Templates, Requests, and Reservations

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### Concepts: Booking Templates, Requests, and Reservations

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#### 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.





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## Delegates Act as You

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**Concept:** A *delegate* is another authorized user who can act as you in EMS Web App and carry out actions on your behalf. To delegate users, first you add them to your account as delegates under My Account. Then they can use the **Act As** option and select your name.

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## MY EVENTS vs. BROWSE EVENTS

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**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.

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### 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.







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## Notifications Automatically Alert People to Changes in EMS

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### **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.

If your EMS Web App implementation uses the [Integration with Exchange](#), you can handle notifications using Outlook.





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## EMS for Outlook® (Optional Capability)

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**Concept:** EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS plugin icon in your Outlook application. You will also see additional features and functionality in EMS. Further, anywhere that you see people or groups in EMS, you will have access to everyone in your organization's email database (which is stored in Exchange Server). This means that you can see people's availability (Out of Office, Busy, In a Meeting, etc.), send them email invitations or notices, and add EMS events to your Outlook calendar.





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## Integration with Exchange Enables You to Use Outlook®

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### **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.

Former releases of EMS software referred to this feature as Plan-a-Meeting (PAM).





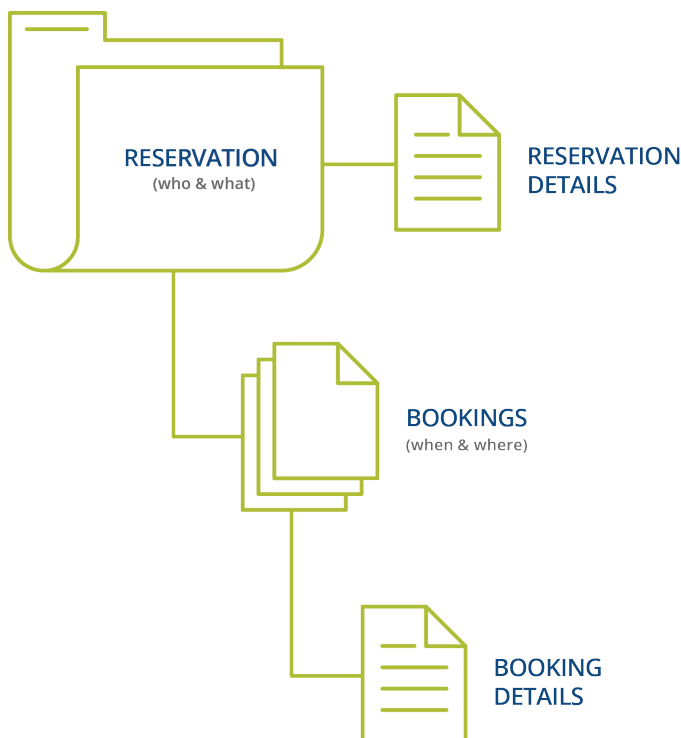
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## Reservations, Bookings, and Booking Details

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).



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### 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.



**See Also:** [Adding Services](#)

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## Understanding Everyday User Templates

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### 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. Learn more about these settings here: [Booking Templates, Requests, and Reservations](#).

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**New!** If you have previously used older versions of EMS, you may know these templates as "Web Process Templates." These are now called "Everyday User Process Templates."

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**See Also:**

[Configuring Everyday User Templates](#)

