

EMS Web App
Installation, Configuration, & User Guides
May 2019

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CHAPTER 1: EMS Web App Installation Guide

The EMS Web App is a browser-based interface to EMS that helps you to find and book an available workspace as well as schedule and manage meetings, events, services, and more.

With the Web App (formerly known as Virtual EMS or VEMS), you can empower your employees to self-serve for specific meeting or work spaces or give them the ability to request reservations for managed spaces.

Concept: EMS Web App also runs on a mobile device such as a tablet or handheld device

Due to the smaller screen size and resolution of tablets and smartphones, pages might display differently, but most of the same functionality is still available.

EMS Mobile App, by contrast, is an app designed specifically for smartphones. It offers functionality specifically for everyday users who need access to EMS while they're on the go. The EMS Mobile App also runs on tablets that run iOS or Android, but the screen layout is optimized for smartphones and does not take advantage of larger displays.

This guide provides information about the following topics:

- [Introduction](#)
- [System Architecture](#)
- [Requirements and Prerequisites](#)
- [Obtain the Installation Files](#)
- [Install or Upgrade to the EMS Web App](#)
 - [Upgrade Considerations](#)
- [Optional EMS Web App Features](#)
- [EMS Mobile Web Application](#)
- [Launch EMS Web App](#)
- [Windows Server 2008/2008 R2 Web Server Setup Guide](#)
 - [Best Practices: Setting Up Your Web Server 2008 or 2008R2](#)
 - [Install .NET Framework](#)
 - [Install Internet Information Services \(IIS\)](#)
 - [Add Role Services](#)

- [Windows Server 2012/2012 R2 Web Server Setup Guide](#)
 - [Best Practices: Setting Up Your Web Server 2012 or 2012R2](#)
 - [Install .NET Framework](#)
 - [Install Internet Information Services \(IIS\)](#)
 - [Add Role Services](#)
- [VPAT for EMS Web App](#)

Contact Customer Support

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



Important!

If you do not have a customer login, register [here](#).

CHAPTER 2: EMS Web App (V44.1) Introduction

This topic will cover the following areas:

- [Introduction to the EMS Web App](#)
- [Installation Requirements](#)
- [Upgrade Considerations](#)
- [Contact Customer Support](#)

Introduction to the EMS Web App

The EMS Web App is a browser-based interface to EMS that helps you to find and book an available workspace as well as schedule and manage meetings, events, services, and more.

With the Web App (formerly known as Virtual EMS), you can empower your employees to self-serve for specific meeting or work spaces or give them the ability to request reservations for managed spaces.

Concept: EMS Web App also runs on a mobile device such as a tablet or handheld device

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EMS Mobile App, by contrast, is an app designed specifically for smartphones. It offers functionality specifically for everyday users who need access to EMS while they're on the go. The EMS Mobile App also runs on tablets that run iOS or Android, but the screen layout is optimized for smartphones and does not take advantage of larger displays.

Installation Requirements

Before beginning the installation process, please install or upgrade your EMS databases as outlined in the EMS Web App Installation Instructions.

Installation will prompt you to enter a web server. Special setup guides are available for Windows 2008/2008 R2 Web Server and Windows 2012/2012 R2 Web Server.

Existing versions of EMS Web App must be manually uninstalled. Please make sure to copy-off and save any files that have been customized.

Please review the System Requirements for V44.1 [here](#).

Upgrade Considerations

If you have deployed an older version of EMS Web App and are upgrading to the newest version, please encourage users at your facility to review What's New before they begin working with the new version of the software. Doing so will streamline the adoption of the new release and help your users benefit from

new features and functions that they might not otherwise discover. Please see [Upgrade Considerations](#) for more information.

Contact Customer Support

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



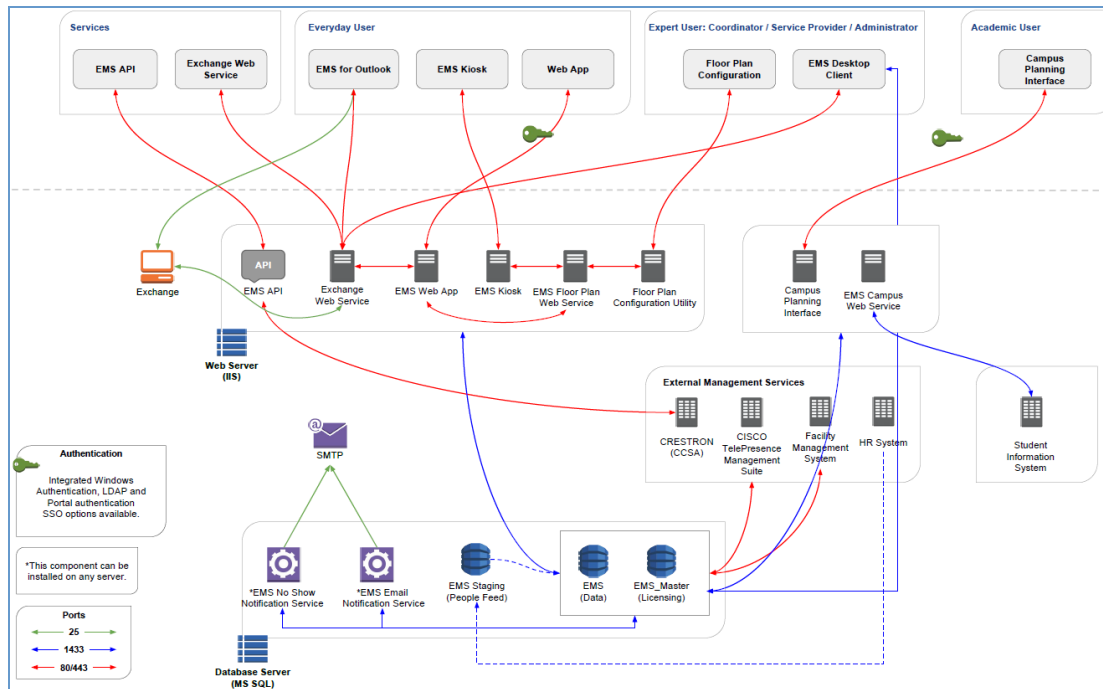
Important!

If you do not have a customer login, register [here](#).

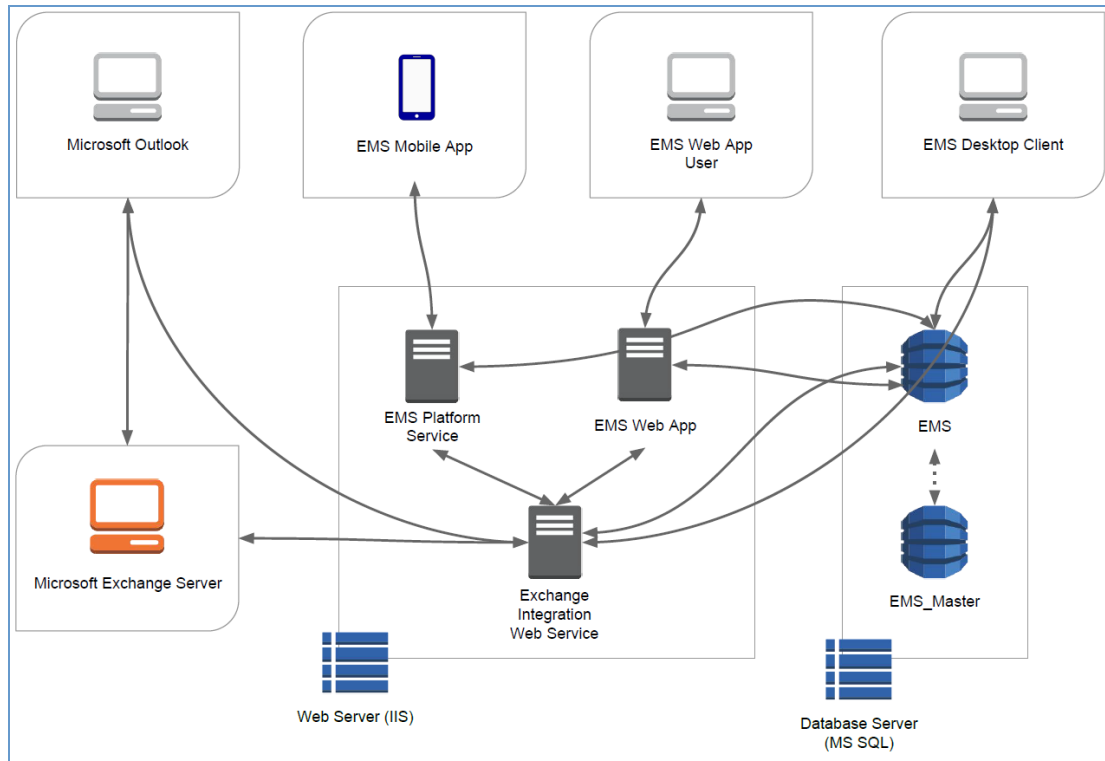
CHAPTER 3: System Architecture

EMS Web App is one of the Everyday User Applications that is controlled by configurations in EMS Desktop Client.

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



The diagram below shows how EMS Everyday Applications interact with EMS Desktop Clients, your web and database servers, and Microsoft® Exchange.



CHAPTER 4: Prerequisites and Requirements



Important!

Existing versions of EMS Web App must be manually uninstalled. **Please make sure to copy-off and save any files that have been customized.**

The following information is necessary to successfully install the EMS Web App:

- [Prerequisites](#)
- [EMS Database Server Requirements](#)
- [EMS Web Server Requirements](#)
- [EMS Web App Requirements](#)
- [EMS Web App \(Mobile\) Requirements](#)

Prerequisites



Important!


Beginning with [Update 31](#), EMS Platform Services is a prerequisite for installing and using the EMS Web App. If EMS Platform Services has not yet been [installed](#) in your environment, validate the [hardware and software requirements for EMS Platform Services](#).

If your organization uses the EMS Mobile App, EMS Kiosk App, Google Integration, EMS for Outlook, or SAML authentication, then EMS Platform Services is already running in your environment.

1. Before beginning the installation process, please install or upgrade your EMS databases as outlined in the [EMS Web App \(V44.1\) Installation Guide](#).
2. Installation will prompt you to enter a web server. Special setup guides are available for [Windows Server 2008/2008 R2 Web Server Setup Guide](#) and [Windows Server 2012/2012 R2 Web Server Setup Guide](#).
3. If using Update 31 or above, [install EMS Platform Services](#) and [connect EMS Web App to EMS Platform Services](#).

EMS Database Server Requirements

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



Important!
2017 is not yet officially supported by EMS Software.

EMS Web Server Requirements

Operating System	IIS VERSION
Windows Server 2016	10.0
Windows Server 2012	8.0
Windows Server 2012 R2	8.5
Windows Server 2016	
Prerequisites	
Application Pool Running	(2.0 or 4.0 depending on the EMS Software Application)
.NET Framework 4.6.1**	

Minimum System Requirements

Processor: 2.0 GHz and 4 cores or faster
 Memory: 8 GB or more**
 Hard-Disk Space: 1 GB or more

*For up to 100 concurrent users. Increased specs required for 100+ concurrent users.

*Requires an update to Windows Management Framework to version 3.

**= varies per EMS Software Application

EMS Web App Requirements

Desktop Browser

[Introduction to EMS for Outlook](#) (please see Note below)

Microsoft Edge (latest)

Microsoft Internet Explorer (IE11)

Firefox (latest)

Chrome (latest)

Safari (Mac) (latest)

*= varies per application.



Note:

EMS Web App V44.1 has been optimized for Internet Explorer 11 and does not require compatibility with previous versions of Internet Explorer. EMS recommends *disabling compatibility mode* when using EMS Web App V44.1.

EMS Web App V44.1 no longer supports Internet Explorer 10 or older.

EMS Web App (Mobile)

Mobile Browser	Platform
Internet Explorer for Mobile 8.1	Windows
Internet Explorer for Mobile 10	Windows
Chrome	Android 4.4, 6.0, 7.0, 7.1
	iOS 9.x, iOS 10.x
Safari	iOS 9.x, iOS 10.x

CHAPTER 5: Obtain the Installation Files

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

1. Log into [Accruent Access](#).
2. Click **My Products**.
3. Under **EMS**, click **Downloads**.

The downloads page opens in a new browser tab.

4. In the **Software Downloads** area, click the link for your version of software, for example, **V44.1 Releases & Patches**.

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

5. Download **EMSWebApplication.msi**. (Required for both first time installations and upgrades.)

CHAPTER 6: Install or Upgrade the EMS Web App

To install or upgrade the EMS Web App

1. Manually **uninstall** any previous versions of VEMS or EMS Web App on your web server.
2. Verify that [Requirements and Prerequisites](#) have been met.



Important!

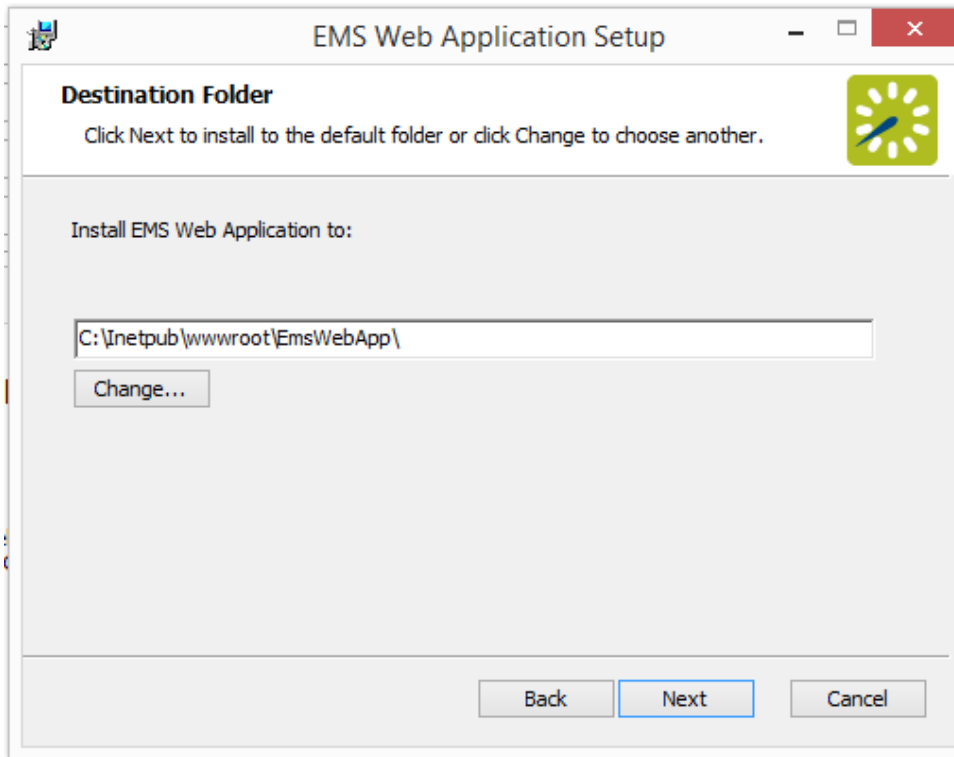
Beginning with [Update 31](#), EMS Platform Services is a prerequisite for installing and using the EMS Web App. If EMS Platform Services has not yet been [installed](#) in your environment, validate the [hardware and software requirements for EMS Platform Services](#).

If your organization uses the EMS Mobile App, EMS Kiosk App, Google Integration, EMS for Outlook, or SAML authentication, then EMS Platform Services is already running in your environment.

3. Download the **EMSWebApplication.msi** file onto the web server that will be running EMS Web App.
4. Run **EMSWebApplication.msi**.
5. The first screen welcomes you to the EMS Web App Setup Wizard. Click **Next** to begin the installation process.



6. In the Destination Folder screen, select the destination folder.



The installation process will create a new physical directory on your web server based on the destination folder path you entered. Click **Next**.

**Note:**

Choosing a folder above other than the default will create a new physical directory on your web server at that location. If your organization uses Internet Information Services (IIS), make sure that the user account used for IIS (IUSR and/or IIS_IUSRS) has access to this new installation directory. To learn more, see [Windows Server 2008/2008 R2 Web Server Setup Guide](#) or [Windows Server 2012/2012 R2 Web Server Setup Guide](#).

**Note:**

EMS Web App should **not** be installed in the same physical directory as other EMS web-based products OR under a site running another version of VEMS or EMS Web App.

7. In the SQL Server and database information screen that appears, enter your SQL Instance Name and your Database Name and click **Next**.

**Note:**

The database name is typically “EMS.”

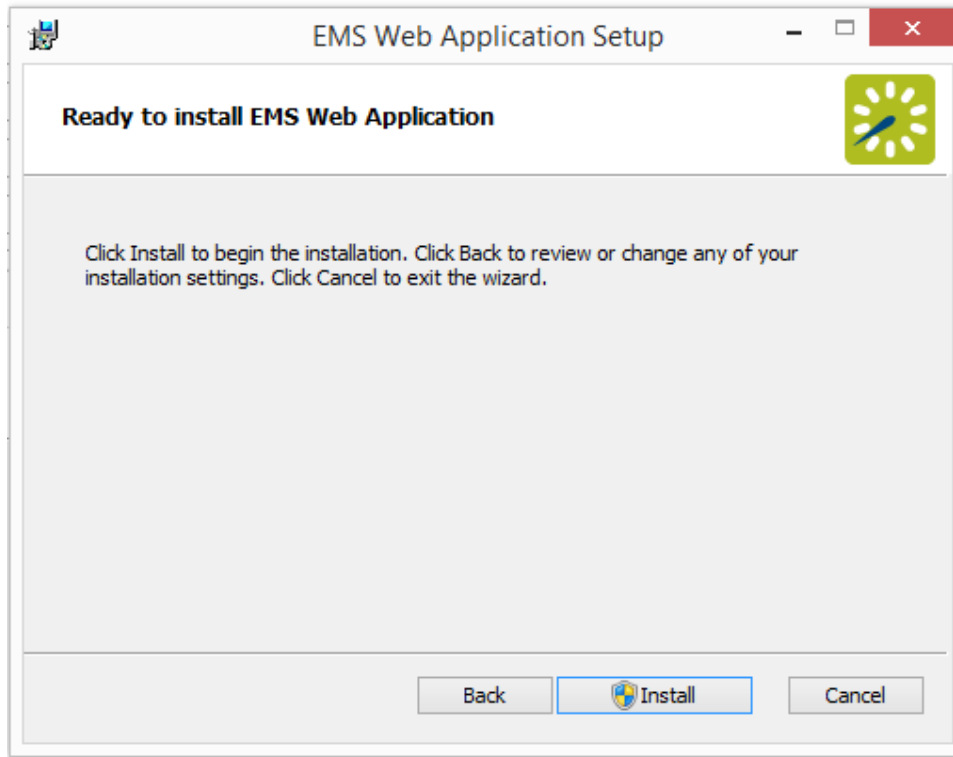
The screenshot shows a window titled "EMS Web Application" with a close button in the top right corner. The main content area is titled "SQL Server and database information." and includes the instruction "Please enter a SQL Server and database name." There is a green icon with a pencil and a sunburst in the top right of the content area. Below the instruction are two text input fields: "SQL Instance Name:" and "Database Name:". At the bottom of the window are three buttons: "Back", "Next", and "Cancel".

8. In the Virtual Directory information screen that appears, the Virtual Directory Name will default to the destination folder you specified (in Step 6 above). It is recommended that you keep the default setting. The installation process will create a virtual directory on your web server based on the virtual directory entered (“EmsWebApp” in the example above). Click **Next**.

**Note:**

EMS Web App should not be installed in the same virtual directory as other EMS web-based products OR under a site running another version of EMS Web App.

9. On the Ready to install EMS Web Application screen that appears, click **Install**.



10. On the Completed the EMS Web App Setup Wizard screen that appears, click **Finish**.
11. EMS Platform Services is required for [Update 31](#) or later; ensure that [EMS Web App is connected to EMS Platform Services](#) as follows:
 - a. Navigate to the EMS Platform Services Admin Portal.
 - b. Select **Integrations**. Under Clients, click on the EMS Web App link.
 - c. Click the **Reset Secret** button and copy the generated Secret.
 - d. In the web.config file located in the designated folder for your current version of EMS, insert the copied Secret ID into the value field.

```
<add key="platformServicesSecret" value="YourSecretID" />
```

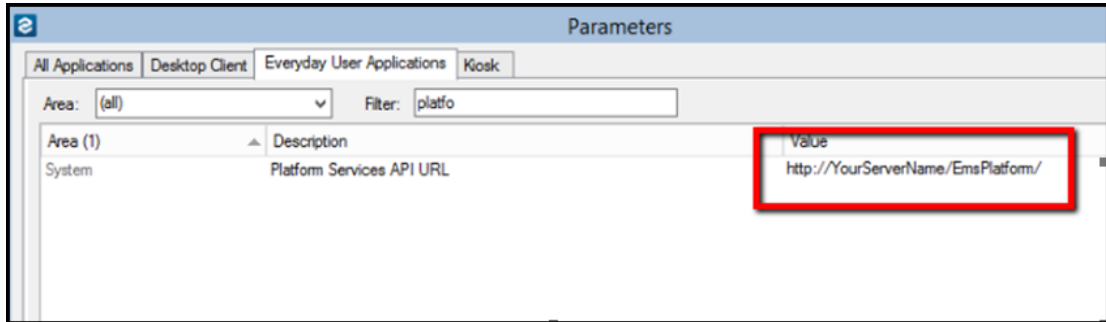


Important!

EMS Cloud Services customers do not need to generate a Secret or insert it into the web.config file (Steps c and d).

- e. [Clear the cache in EMS Platform Services](#).
- f. In the EMS Desktop Client, navigate to **System Administration > Settings > Parameters > Everyday User Applications**. Configure the **Platform Services API URL** parameter and then

click **Close**.



Everyday User Applications Tab, Platform Services API URL

CHAPTER 7: Upgrade Considerations

When planning to upgrade from previous versions of VEMS to the new EMS Web App, you should take the new features, functionality, and default settings into consideration. Please encourage users at your facility to review What's New before they begin working with the new version of the software. Doing so will streamline the adoption of the new release and help your users benefit from new features and functions that they might not otherwise discover.

This topic provides information on the following:

- [Time Zone Settings](#)
- [Best Practices](#)
- [Configuration and Parameter Settings](#)
- [Web Menus](#)
- [Functional Changes](#)
- [Help Text Records](#)
- [CSS \(Style\) Settings](#)
- [Language Translation](#)
- [All Other Customizations](#)

Time Zone Settings

Web Users should be assigned to a time zone for an optimal experience.

Best Practices

Display settings and other environmental factors greatly affect the performance of EMS Floorplan. For an optimal floorplan experience, please follow these [Best Practices](#).

Configuration and Parameter Settings

- Due to a change in product naming, you will need to update the name of the Exchange Integration Web Service URL parameter. See Also: [EMS Web App System Parameters](#).
- For an optimal user-interface experience, we recommend keeping text-based fields and notes (e.g., Room Descriptions, Process Template Descriptions, Event Names, etc.) as brief as possible.

- New parameters have been introduced:
 - For organizations who direct everyday users to manually create their own accounts:
 - Sign Up Confirmation Email
 - Sign Up Success Email
 - Request Received Email
 - Password Reset Email
 - Password Reset Success Email
 - Default Home Page of Site Home or My Home (My Home is the default).
 - Show Infographics on My Home (No is the default).
 - Default Cancel Reason
- Some parameters have been updated:
 - Default Account Status for Newly-Created User (formerly Security Status for User) - Options are Active or Pending. Inactive option has been removed.
 - Browse Events - Display Format - Reduced to Daily, Weekly, and Monthly options.
 - Setup Type Validation Rule - No longer affects room searching. Will still handle Setup Type display and validating attendance against capacities.
 - Allow Access to System Check Pages from Any Machine? - No longer applies to EMS Web App as SystemCheck.aspx has been removed for this application.
 - Default Value for Attendance - Default is now "1." Existing configurations of this parameter for any value other than "0" will not be affected upon upgrade.
- Some parameters have been removed for V44.1:
 - Note Label on Account Management - Field is no longer exposed to the everyday user.
 - Number of Hours to Show on Browse for Space - No longer applicable.
 - Maximum Number of Events/Day to Display - No longer applicable. Maximums now set per view (Daily, Weekly, or Monthly).
 - Secondary Event Sort (After Date/Time) - No longer applicable. All columns are sortable.
 - Devices to redirect to mobile site - No longer applicable as EMS Web App is now mobile-responsive.
 - Display Areas as Filter - Areas are incorporated into Locations for searching.
 - Allow User to Change Setup Count in Selected Locations Area - Permanently enabled as part of the new UX design.

Web Menus

- **All custom menus should be reviewed and updated/removed prior to updating in a live environment.**
- Custom menus can be parented under the Links or Help icon (for organization-specific help pages). Upgrading will re-parent all custom menus under Links.
- Process templates can be sequenced under Create a Reservation menu but can no longer be moved to different menus.
- Due to the new UI design, system-generated menus cannot be re-sequenced or relabeled, and you cannot modify their URLs.

Functional Changes

The following changes will show in your new installation due to the new UI design:

- The EMS Web App has been made mobile-responsive. Therefore, mobile-specific pages such as MobileLogin.aspx have been removed. Everyday users can instead access mobile-responsive versions of the same pages used when accessing the EMS Web App on a desktop machine.
- New [Validated checkbox](#) for everyday users:
 - Only applies to manual authentication creation and approval process, but checkbox appears for all users regardless.
 - Will be automatically selected for new users created in the EMS desktop client and via EMS Human Resources Toolkit.
 - New EMS Human Resources Toolkit installations will have the Validated checkbox included in update logic.
- For tighter security, the SystemCheck.aspx page and the Ctrl+Shift+U keystroke shortcut to access SystemCheck.aspx have been removed for the EMS Web App. Some information previously included on SystemCheck.aspx has been relocated to options within the Web Administrator menu of the EMS Web App:
 - Clear Cache option
 - License information
 - Server and database connection string
 - Error Log Files
 - Application version and information (relocated to the About page)
- Services, video conferencing, and reservation management will not be available on the mobile version of the EMS Web App nor on the EMS Mobile App.

- Template personalization will be automatically enabled for all process templates, which means that users will be able to set favorite templates to streamline navigation during the booking process. Favorite templates, for example, will be listed in a drop-down list when the user begins booking space.

Help Text Records

- **All help text records should be reviewed and updated/removed prior to updating in a live environment.**
- Home page web text records will now belong under Site Home and can differ for unauthenticated users vs. authenticated users.
- For organizations who direct everyday users to manually create their own accounts, a new text record for Terms of Use has been introduced.
- Some help text records have been removed (listed alphabetically by the database value LookupKey for tblWebText):
 - MenuItem
 - VEMSAccountManagementHelp
 - VEMSAddBookingHelpPopup
 - VEMS_BadBrowserHelp
 - VEMSBillingReferenceLookupHelp
 - VEMSClassicRequestPopup
 - VEMSEditAccountHelp
 - VEMSEditBookingHelpPopup
 - VEMSGroupLookupOnPage
 - VEMSLdapConfigurationHelp
 - VEMSLoginHelp
 - VEMSLoginPageMainContent
 - VEMSLogoutPageMainContent
 - VEMSLogoutScreenMessage
 - VEMSMissingOrInvalidExpectedQuerystring
 - VEMSPONumberLookupHelp
 - VEMSReservationDetailsHelp
 - VEMSReservationRecurrenceHelp

- VEMSReservationSummaryCheckInSuccess
 - VEMSReservationSummaryCheckInUnavailable
 - VEMSRoomRequestHelpPopup
 - VEMSUDFDetailsHelp
 - VEMSUserPersonalizationHelp
- Application title help record only applies to Default.aspx (HTML not recommended for this page).

CSS (Style) Settings

- **All custom CSS should be reviewed and updated/removed prior to upgrading in a live environment.**
- Custom.CSS now saved under EMSWebApp/Content/Custom/Custom.CSS instead of the Styles folder.

Language Translation

- [Language translation](#) is still supported, but administrators should review the new site design to apply new translations where necessary.

All Other Customizations

- **Any custom logos, custom JavaScript, and all other customizations should be reviewed and updated/removed prior to updating in a live environment.**

CHAPTER 8: Optional EMS Web App Features

If you currently do not own one of optional, separately-licensed modules outlined below, but are interested in more information, please contact your Account Executive.

Integrated Authentication

The Integrated Authentication module is a component for EMS Web App that provides single-sign-on capability using Integrated Windows Authentication, your organization's portal or LDAP. See Also: [EMS Authentication Methods](#).

Integration to Microsoft[®] Exchange

Integration with Exchange is a component for EMS Web App that integrates with Exchange. With this module, web users can view the availability of both meeting rooms and attendees, and send Outlook-compatible meeting invitations—all from within EMS Web App. See Also: [Integration to Microsoft Exchange](#) for installation instructions.

Floor Plans

EMS Floor Plans allows web users to search for, view, and reserve available space from an interactive floor plan within EMS Web App. Floor plans and associated available/unavailable indicator images are [configured](#) in the EMS Desktop Client. See Also: [Floor Plans Module Installation Instructions](#).

CHAPTER 9: EMS Mobile Web Application

The EMS Web App also runs on a mobile device such as a tablet or handheld. Due to the smaller screen size and resolution of tablets and smartphones, pages might display differently but most of the same functionality is still available.

EMS Mobile App, by contrast, is an app designed specifically for smartphones. It offers functionality specifically for everyday users who need access to EMS while they're on the go. The EMS Mobile App also runs on tablets that run iOS or Android, but the screen layout is optimized for smartphones and does not take advantage of larger displays.

See Also: [Web App Installation Guide](#) and [Web App Configuration Guide](#).

CHAPTER 10: Launch EMS Web App

1. After [obtaining the latest version of EMS Web App](#), verify your installation by opening a browser and entering the EMS Web App address:

http://[ServerName]/WebApp/

(replace [ServerName] with the name of your web server)

The format above assumes you used the default values at installation.

2. The first time you launch EMS Web App, it might take a few extra moments for the website to display. If you encounter any issues, please contact Customer Support for assistance.
3. For information on how to configure EMS Web App, please refer to [EMS Desktop Client Configuration Guide](#).

CHAPTER 11: Windows Server 2008/2008 R2 Web Server Setup Guide

Follow this guide to install EMS on a new web server, to support EMS web applications such as EMS Web App, VEMS, EMS for Outlook, and EMS Mobile App.

- [Best Practices: Setting Up Your Web Server 2008 or 2008 R2](#)
- [Install .NET Framework 2008](#)
- [Install Internet Information Services \(IIS\)](#)
 - [Add Role Services](#)

CHAPTER 12: Best Practices: Setting Up Your Web Server 2008 or 2008 R2

This section guides you in best practices in setting up a Web Server for installation of EMS web-based products and is intended for experienced System Administrators. Please be aware that we can only provide instructions for modifying your web server as tested in our facilities, and cannot guarantee results for your configuration. Lastly, after completing these modifications, you will need to perform your own adjustments to system security etc.

For information on Web Server 2012, see [Best Practices: Setting Up Your Web Server 2012 or 2012 R2](#).



Note:

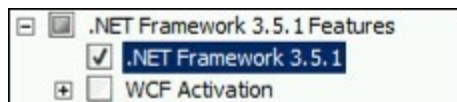
Before beginning the installation process, please review [EMS System Requirements](#) before proceeding. The minimum hardware requirements must be met to continue with the configuration below. Administrative rights will be necessary to enable the roles and features listed for each Windows Server.

This topic provides information on the following:

- [To Install .NET Framework 3.5](#)
- [To Install .NET Framework 4.5: Regics Only](#)
- [To Install Internet Information Services \(IIS\)](#)
 - [To Add Role Services](#)

To Install .NET Framework 3.5

1. Navigate to Start > All Programs > Administrative Tools > Server Manager.
2. In the Server Manager interface, click Features to view all the installed Features in the right pane.
3. In the Server Manager interface, select Add Features to lists possible features.
4. In the Select Features interface, expand .NET Framework 3.5.1 Features.
5. Once expanded, select .NET Framework 3.5.1 and click Next.



6. In the Confirm Installation Selections interface, review the selections, then click Install.
7. Once the installation process completes, click Close.

To Install .NET Framework 4.5: Regics Only

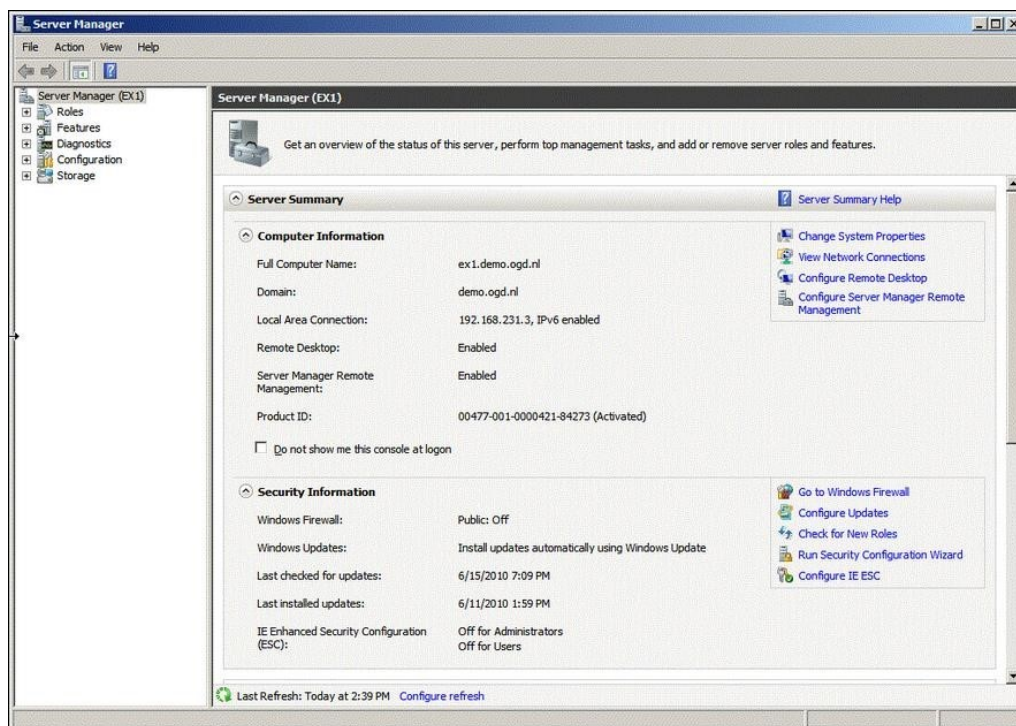
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[Microsoft® .NET Framework 4.5](#)

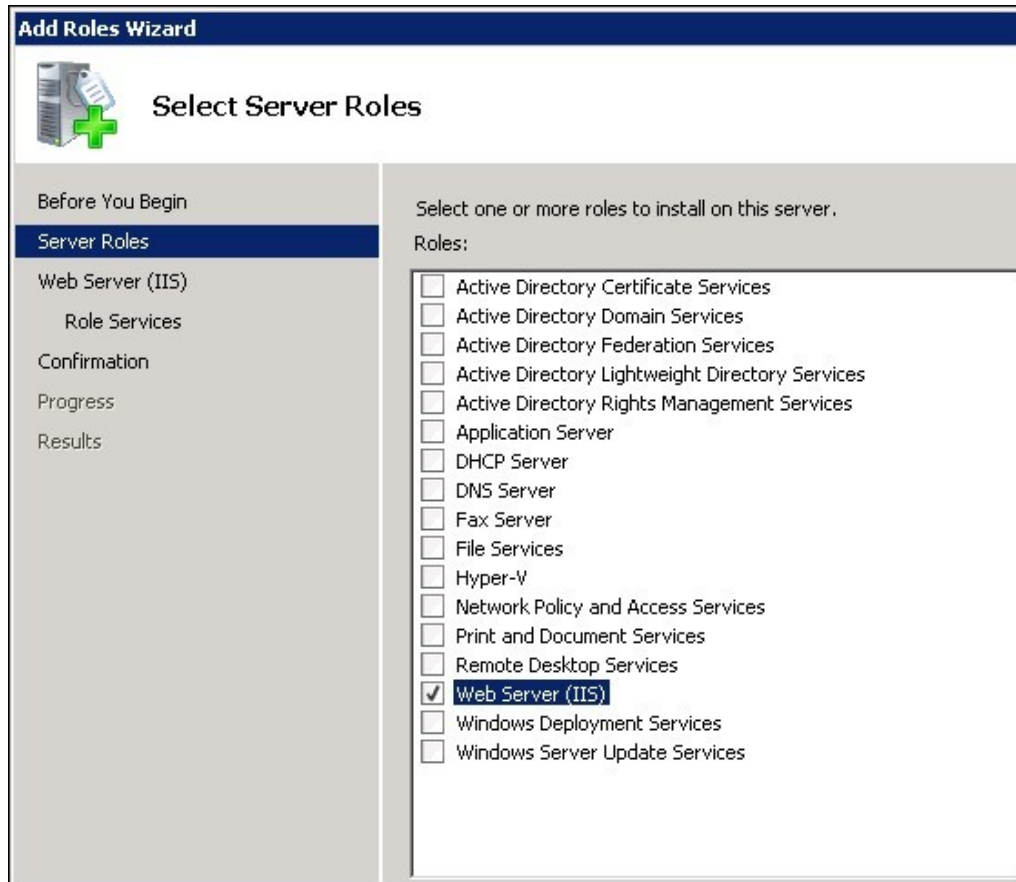
To Install Internet Information Services (IIS)

To install IIS on a Windows Server 2008, follow the instructions below.

1. Navigate to Start > All Programs > Administrative Tools > Server Manager.



2. In the Server Manager window, scroll down to Roles Summary, and then click Add Roles.
3. Select Web Server (IIS) on the Select Server Roles page. An introductory page will open with links for further information.
 - a. The Web Server (IIS) role in Windows Server 2012 provides a secure, easy-to-manage, modular and extensible platform for reliably hosting websites, services, and applications.



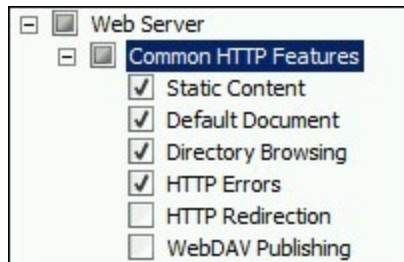
To Add Role Services

When adding IIS using the Add Roles Wizard, only the default installation is executed, which has a minimum set of role services. For EMS products, it is necessary to add role services for the programs to function properly. If role services are added after installing IIS, the Server Administrator will need to navigate to the Role Services page by following the above directions and then clicking Next.

Select the following IIS Role Services to be installed:

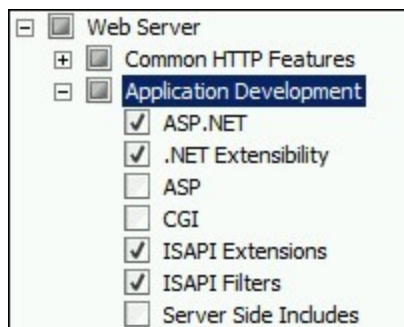
- [Common HTTP Features](#)
- [Application Development](#)
- [Health and Diagnostics](#)
- [Security](#)
- [Performance](#)
- [Management Tools](#)

Common HTTP Features



1. **Static Content** – Static Content lets the Web server publish static Web file formats, such as HTML pages and image files. Use Static Content to publish files on a Web server that users can then view using a Web browser.
2. **Default Document** – Default Document lets organizations configure a default file for the Web server to return when users do not specify a file in a URL. Default documents make it easier and more convenient for users to reach an organizations Web site.
3. **Directory Browsing** – Directory Browsing lets users see the contents of a directory on a Web server. Use Directory Browsing to enable an automatically generated list of all directories and files available in a directory when users do not specify a file in a URL and default documents are either disabled or not configured.
4. **HTTP Errors** – HTTP Errors lets organizations customize the error messages returned to users' browsers when the Web server detects a fault condition. Use HTTP errors to give users a better user experience when they run up against an error message. Consider providing users with an e-mail address for staff who can help them resolve the error.

Application Development

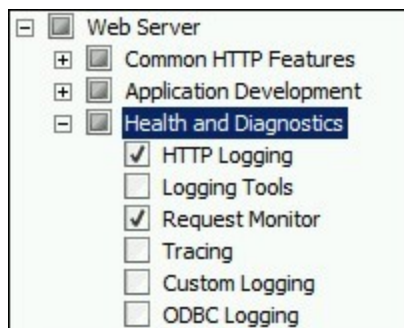


1. **ASP.NET** – ASP.NET provides a server side object-oriented programming environment for building Web sites and Web applications that use managed code. ASP.NET is not just a new version of ASP. ASP.NET provides a robust infrastructure for building Web applications, and it has been completely re-architected to provide a highly productive programming experience based on the .NET Framework.
2. **.NET Extensibility** – .NET Extensibility lets managed code developers change, add, and extend Web server functionality in the request pipeline, the configuration, and the UI. Developers can use the

familiar ASP.NET extensibility model and rich .NET APIs to build Web Server features that are just as powerful as those written using the native C++ APIs.

3. **ISAPI Extensions** – Internet Server Application Programming Interface (ISAPI) Extensions provides support for dynamic Web content development using ISAPI extensions. An ISAPI extension runs when requested, just like any other static HTML file or dynamic ASP file. Since ISAPI applications are compiled code, they are processed much faster than ASP files or files that call COM+ components.
4. **ISAPI Filters** – Internet Server Application Programming Interface (ISAPI) Filters provides support for Web applications that use ISAPI filters. ISAPI filters are files that can extend or change the functionality provided by IIS. An ISAPI filter reviews every request made to the Web server, until the filter finds one that it needs to process.

Health and Diagnostics



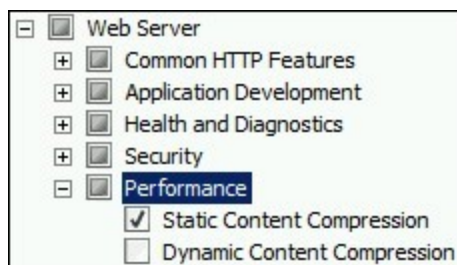
1. **HTTP Logging** – HTTP Logging provides logs site activity for this server. When a loggable event (usually an HTTP transaction) occurs, IIS calls the selected logging module, which then writes to one of the logs stored in the file system of the Web server. These logs are kept in addition to those provided by the operating system.
2. **Request Monitoring** – Request Monitor provides infrastructure to monitor Web application health by capturing information about HTTP requests in an IIS worker process. Administrators and developers can use Request Monitor to understand which HTTP requests are executing in a worker process when the worker process has become unresponsive or very slow.

Security



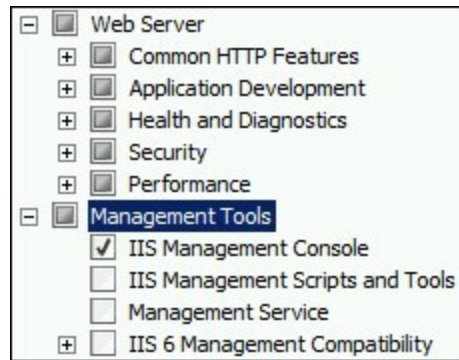
1. **Windows Authentication** – Windows Authentication is a low cost authentication solution for internal Web sites. This authentication scheme allows administrators in a Windows domain to take advantage of the domain infrastructure for authenticating users. Do not use Windows authentication if users who must be authenticated access an organization's website from behind firewalls and proxy servers.
2. **Request Filtering** – Request Filtering screens all incoming requests to the server and filters these requests based on rules set by the administrator. Many malicious attacks share common characteristics, such as very long URLs, or requests for an unusual action. Filtering requests, can attempt to reduce the impact of these types of attacks.

Performance



3. **Static Content Compression** – Static Content Compression provides infrastructure to configure HTTP compression of static content. This provides more efficient use of bandwidth. Unlike dynamic responses, compressed static responses can be cached without degrading CPU resources.

Management Tools

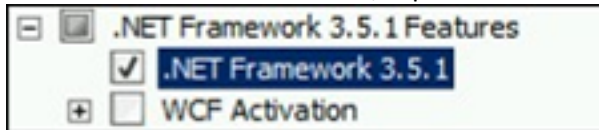


4. **IIS Management Console** – IIS Manager provides infrastructure to manage IIS by using a graphical user interface. IIS Manager can be used to manage a local or remote Web server that runs IIS.

CHAPTER 13: Install .NET Framework 2008

Install .NET Framework 3.5

1. Navigate to **Start > All Programs > Administrative Tools > Server Manager**.
2. In the Server Manager interface, click **Features** to display all the installed Features in the right pane.
3. In the Server Manager interface, select **Add Features** to displays a list of possible features.
4. In the Select Features interface, expand **.NET Framework 3.5.1 Features**.



5. Check the box next to **.NET Framework 3.5.1** and click **Next**.
6. In the Confirm Installation Selections interface, review the selections and then click **Install**.
7. Allow the installation process to complete and then click **Close**.

Install .NET Framework 4.5: Regics Only

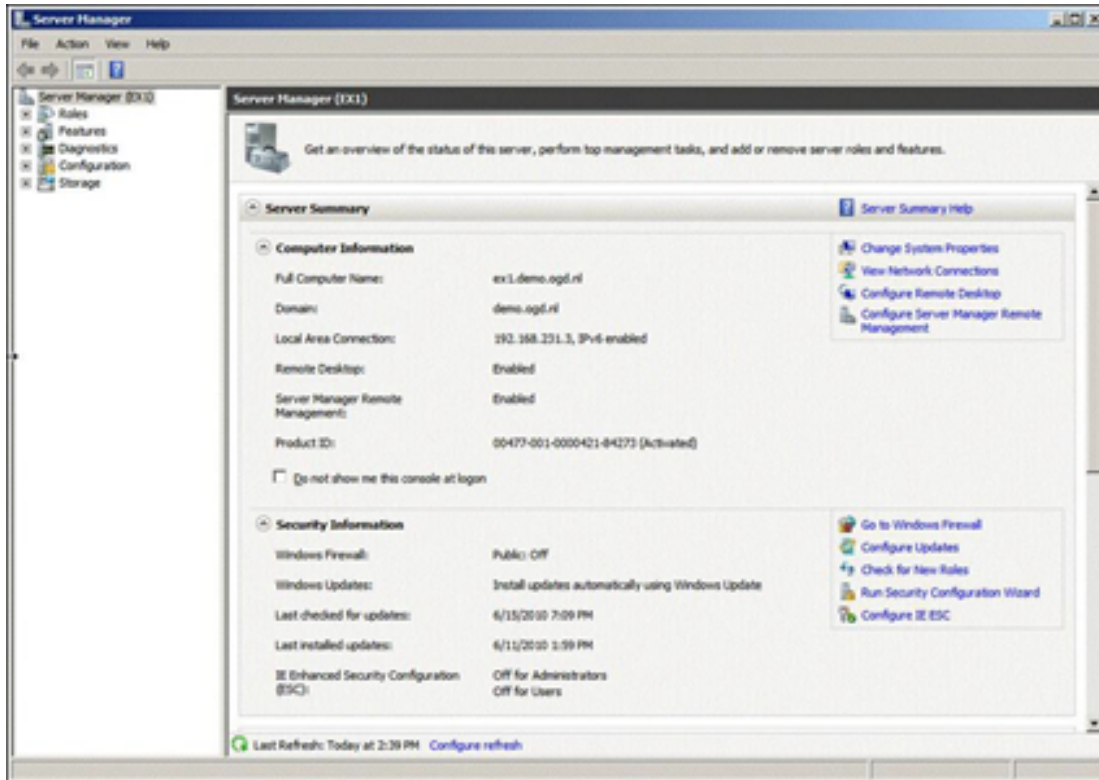
Windows Server 2008/2008 R2 does not have a built in way to install .NET Framework 4.5. To install .NET Framework 4.5, the server admin will need to download the following redistributable to the server and install it following the instructions.

Download Link: [.NET Framework 4.5](#).

CHAPTER 14: Install Internet Information Services (IIS)

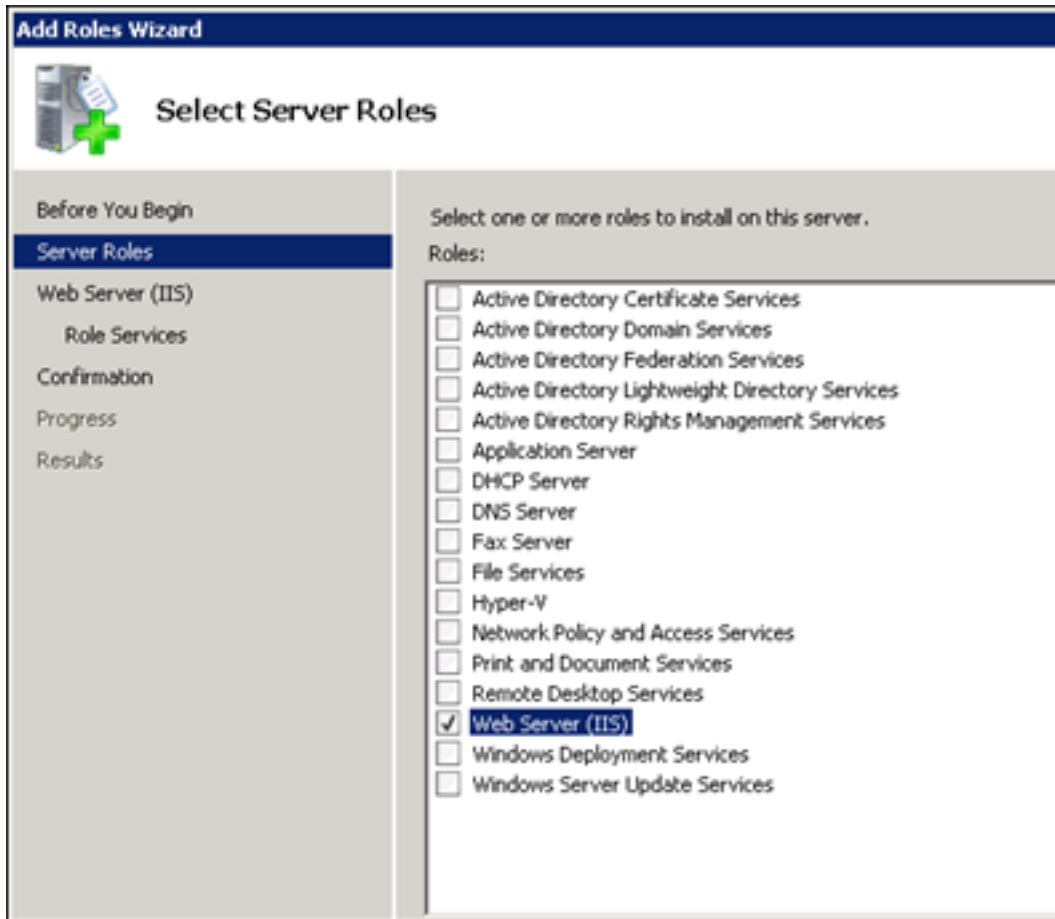
To install IIS on a Windows Server 2008 follow the instructions below.

1. Navigate to **Start > All Programs > Administrative Tools > Server Manager**.



2. In the Server Manager window, scroll down to Roles Summary, and then click **Add Roles**.
3. Select Web Server (IIS) on the Select Server Roles page. An introductory page will open with links for further information. The Web Server (IIS) role in Windows Server 2012 provides a secure, easy-to-

manage, modular and extensible platform for reliably hosting websites, services, and applications.



See Also: [Add Roles](#)

CHAPTER 15: Add Role Services

When adding IIS using the Add Roles Wizard, only the default installation is executed, which has a minimum set of role services. For EMS products, it is necessary to add role services for the programs to function properly. If role services are added after installing IIS, the Server Administrator will need to navigate to the Role Services page by following the [Install Internet Information Services \(IIS\)](#) directions and then clicking **Next**.

Select the following IIS Role Services to be installed:

- [Common HTTP Features](#)
- [Application Development](#)
- [Health and Diagnostics](#)
- [Security](#)
- [Performance](#)
- [Management Tools](#)

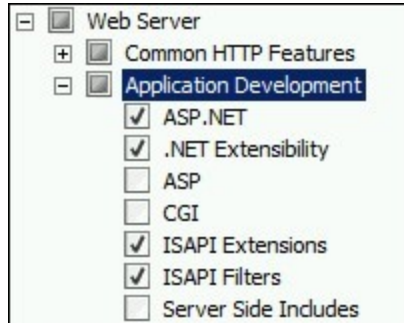
Common HTTP Features



1. **Static Content** – Static Content lets the Web server publish static Web file formats, such as HTML pages and image files. Use Static Content to publish files on a Web server that users can then view using a Web browser.
2. **Default Document** – Default Document lets organizations configure a default file for the Web server to return when users do not specify a file in a URL. Default documents make it easier and more convenient for users to reach an organizations Web site.
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4. **HTTP Errors** – HTTP Errors lets organizations customize the error messages returned to users' browsers when the Web server detects a fault condition. Use HTTP errors to give users a better user

experience when they run up against an error message. Consider providing users with an e-mail address for staff who can help them resolve the error.

Application Development



1. **ASP.NET** – ASP.NET provides a server side object-oriented programming environment for building Web sites and Web applications that use managed code. ASP.NET is not just a new version of ASP. ASP.NET provides a robust infrastructure for building Web applications, and it has been completely re-architected to provide a highly productive programming experience based on the .NET Framework.
2. **.NET Extensibility** – .NET Extensibility lets managed code developers change, add, and extend Web server functionality in the request pipeline, the configuration, and the UI. Developers can use the familiar ASP.NET extensibility model and rich .NET APIs to build Web Server features that are just as powerful as those written using the native C++ APIs.
3. **ISAPI Extensions** – Internet Server Application Programming Interface (ISAPI) Extensions provides support for dynamic Web content development using ISAPI extensions. An ISAPI extension runs when requested, just like any other static HTML file or dynamic ASP file. Since ISAPI applications are compiled code, they are processed much faster than ASP files or files that call COM+ components.
4. **ISAPI Filters** – Internet Server Application Programming Interface (ISAPI) Filters provides support for Web applications that use ISAPI filters. ISAPI filters are files that can extend or change the functionality provided by IIS. An ISAPI filter reviews every request made to the Web server, until the filter finds one that it needs to process.

Health and Diagnostics



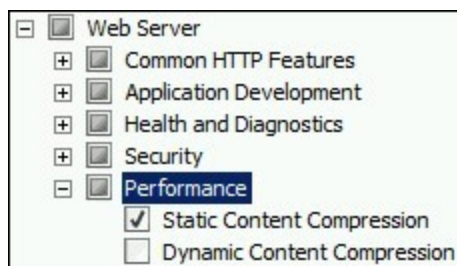
1. **HTTP Logging**—HTTP Logging provides logs site activity for this server. When a loggable event (usually an HTTP transaction) occurs, IIS calls the selected logging module, which then writes to one of the logs stored in the file system of the Web server. These logs are kept in addition to those provided by the operating system.
2. **Request Monitoring**—Request Monitor provides infrastructure to monitor Web application health by capturing information about HTTP requests in an IIS worker process. Administrators and developers can use Request Monitor to understand which HTTP requests are executing in a worker process when the worker process has become unresponsive or very slow.

Security



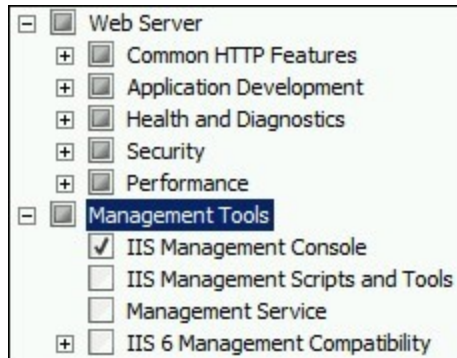
1. **Windows Authentication** – Windows Authentication is a low-cost authentication solution for internal websites. This authentication scheme allows administrators in a Windows domain to take advantage of the domain infrastructure for authenticating users. Do not use Windows authentication if users who must be authenticated access an organization's website from behind firewalls and proxy servers.
2. **Request Filtering** – Request Filtering screens all incoming requests to the server and filters these requests based on rules set by the administrator. Many malicious attacks share common characteristics, such as very long URLs, or requests for an unusual action. Filtering requests, can attempt to reduce the impact of these types of attacks.

Performance



Static Content Compression – Static Content Compression provides infrastructure to configure HTTP compression of static content. This provides more efficient use of bandwidth. Unlike dynamic responses, compressed static responses can be cached without degrading CPU resources.

Management Tools



IIS Management Console – IIS Manager provides infrastructure to manage IIS by using a graphical user interface. IIS Manager can be used to manage a local or remote Web server that runs IIS.

CHAPTER 16: Windows Server 2012/2012 R2 Web Server Setup Guide

Follow this guide to install EMS on a new web server, to support EMS web applications such as EMS Web App, VEMS, EMS for Outlook, and EMS Mobile App.

- [Best Practices: Setting Up Your Web Server 2012 or 2012R2](#)
- [Install .NET Framework](#)
- [Install Internet Information Services \(IIS\)](#)
 - [Add Role Services](#)

CHAPTER 17: Best Practices: Setting Up Your Web Server 2012 or 2012 R2

This section guides you in best practices in setting up a Web Server for installation of EMS web-based products and is intended for experienced System Administrators. Please be aware that we can only provide instructions for modifying your web server as tested in our facilities, and cannot guarantee results for your configuration. Lastly, after completing these modifications, you will need to perform your own adjustments to system security etc.



Note:

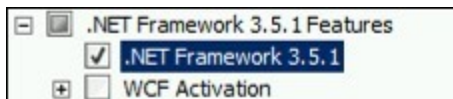
Before beginning the installation process, please review [EMS System Requirements](#) before proceeding. The minimum hardware requirements must be met to continue with the configuration below. Administrative rights will be necessary to enable the roles and features listed for each Windows Server.

This topic provides information on the following:

- [To Install .NET Framework 3.5](#)
- [To Install .NET Framework 4.5: Regics Only](#)
- [To Install Internet Information Services \(IIS\)](#)
 - [To Add Role Services](#)
- [Windows Server 2012/2012 R2](#)
 - [To Add Role Services](#)

To Install .NET Framework 3.5

1. Navigate to **Start > All Programs > Administrative Tools > Server Manager**
2. In the Server Manager interface, click **Features** to view all the installed Features in the right pane.
3. In the Server Manager interface, select **Add Features** to lists possible features.
4. In the Select Features interface, expand **.NET Framework 3.5.1 Features**.
5. Once expanded, select **.NET Framework 3.5.1** and click **Next**.



6. In the Confirm Installation Selections interface, review the selections, then click **Install**.
7. Once the installation process completes, click **Close**.

To Install .NET Framework 4.5: Regics Only

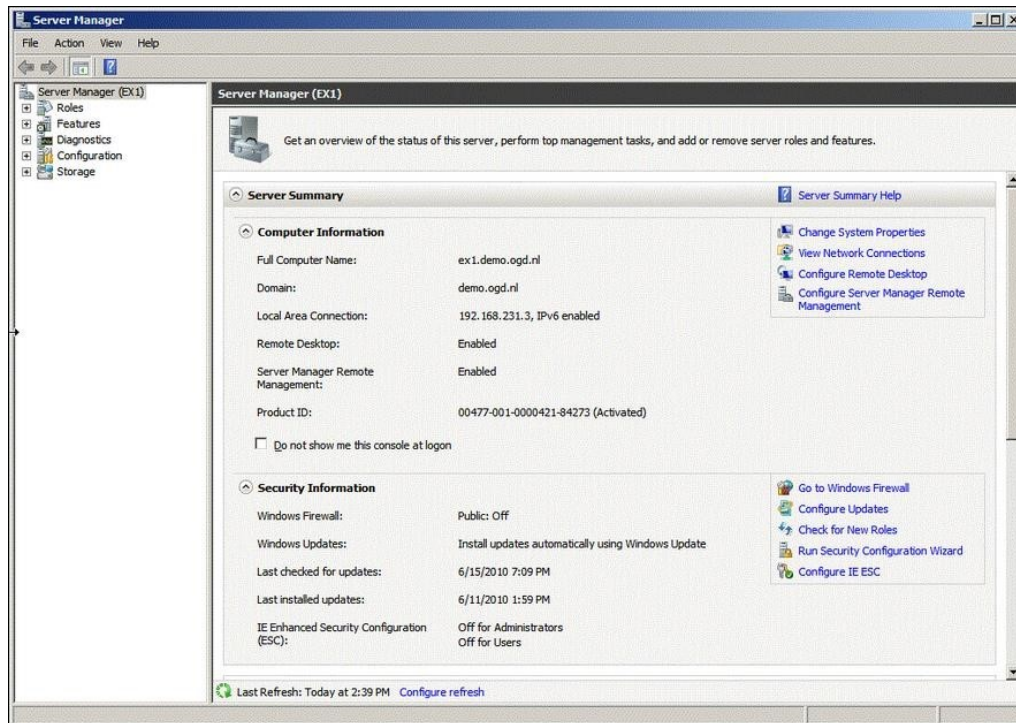
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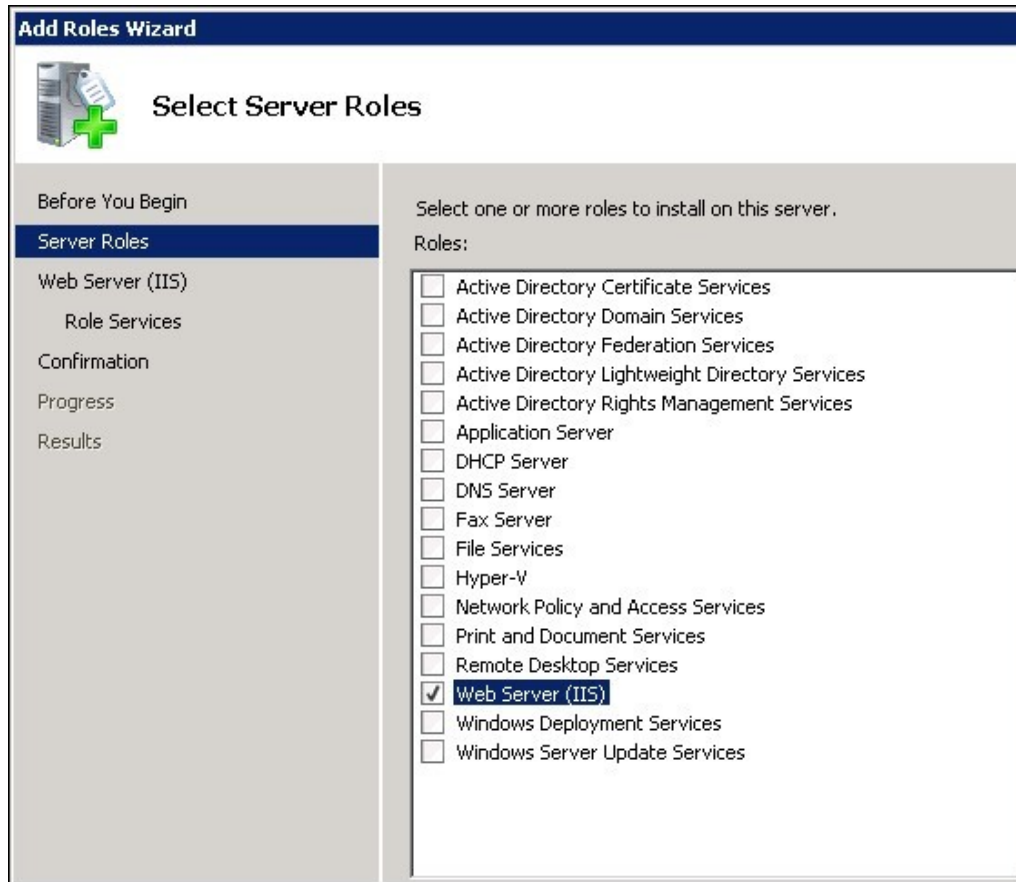
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3. Select **Web Server (IIS)** on the Select Server Roles page. An introductory page will open with links for further information.
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To Add Role Services

When adding IIS using the Add Roles Wizard, only the default installation is executed, which has a minimum set of role services. For EMS products, it is necessary to add role services for the programs to function properly. If role services are added after installing IIS, the Server Administrator will need to navigate to the Role Services page by following the above directions and then clicking **Next**.

Select the following IIS Role Services to be installed:

- [Common HTTP Features](#)
- [Application Development](#)
- [Health and Diagnostics](#)
- [Security](#)
- [Performance](#)
- [Management Tools](#)

Common HTTP Features



1. **Static Content**—Static Content lets the Web server publish static Web file formats, such as HTML pages and image files. Use Static Content to publish files on a Web server that users can then view using a Web browser.
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when requested, just like any other static HTML file or dynamic ASP file. Since ISAPI applications are compiled code, they are processed much faster than ASP files or files that call COM+ components.

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Health and Diagnostics



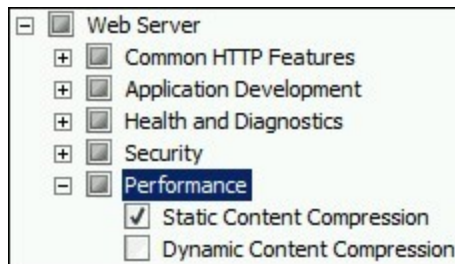
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2. **Request Monitoring**—Request Monitor provides infrastructure to monitor Web application health by capturing information about HTTP requests in an IIS worker process. Administrators and developers can use Request Monitor to understand which HTTP requests are executing in a worker process when the worker process has become unresponsive or very slow.

Security



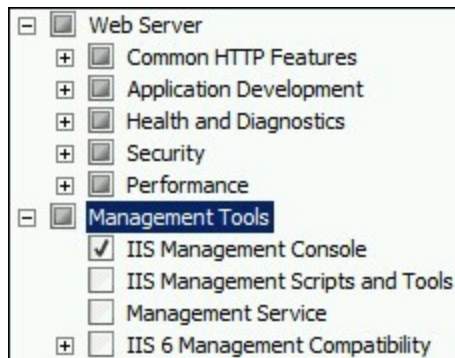
1. **Windows Authentication**—Windows Authentication is a low cost authentication solution for internal Web sites. This authentication scheme allows administrators in a Windows domain to take advantage of the domain infrastructure for authenticating users. Do not use Windows authentication if users who must be authenticated access an organization's website from behind firewalls and proxy servers.
2. **Request Filtering**—Request Filtering screens all incoming requests to the server and filters these requests based on rules set by the administrator. Many malicious attacks share common characteristics, such as very long URLs, or requests for an unusual action. Filtering requests, can attempt to reduce the impact of these types of attacks.

Performance



Static Content Compression—Static Content Compression provides infrastructure to configure HTTP compression of static content. This provides more efficient use of bandwidth. Unlike dynamic responses, compressed static responses can be cached without degrading CPU resources.

Management Tools



IIS Management Console—IIS Manager provides infrastructure to manage IIS by using a graphical user interface. IIS Manager can be used to manage a local or remote Web server that runs IIS.

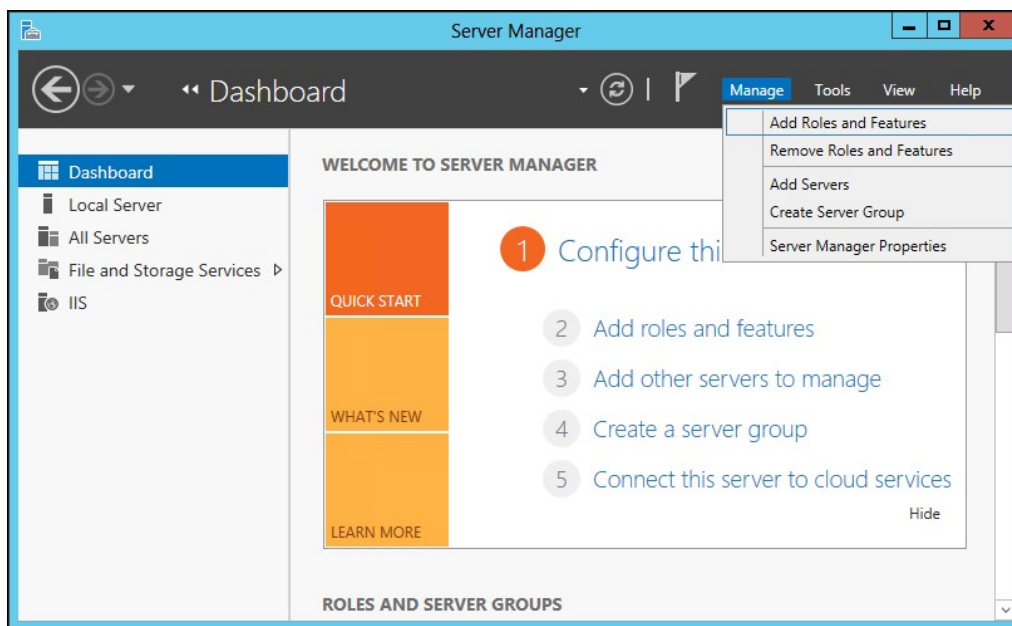
Windows Server 2012/2012 R2



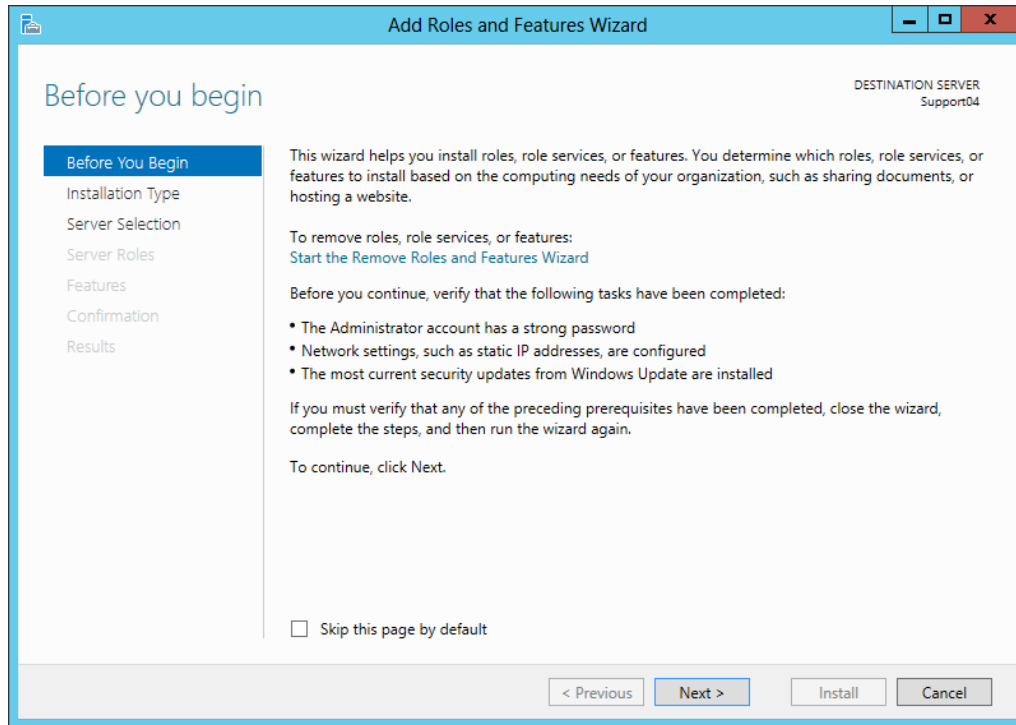
Important!

Before beginning the installation process, please see our [system requirements](#). The minimum hardware requirements must be met to continue with the below configuration. Administrative rights will be necessary to enable the roles and features listed for each Windows Server.

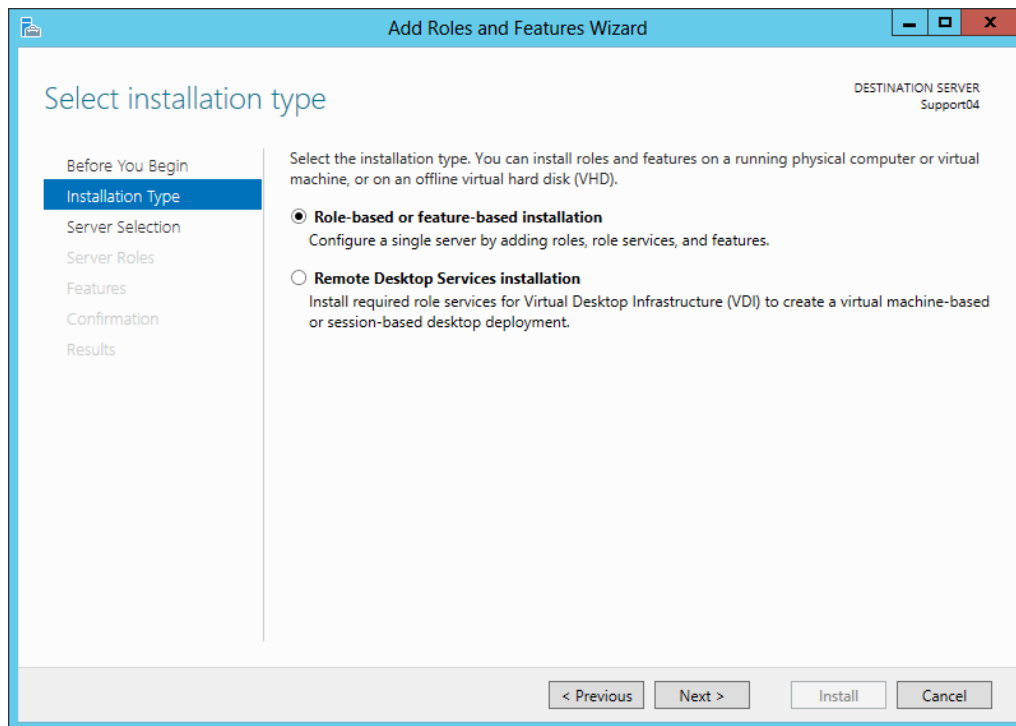
1. In Server Manager, click **Manage** and then select **Add Roles and Features** to start the **Add Roles and Features Wizard**.



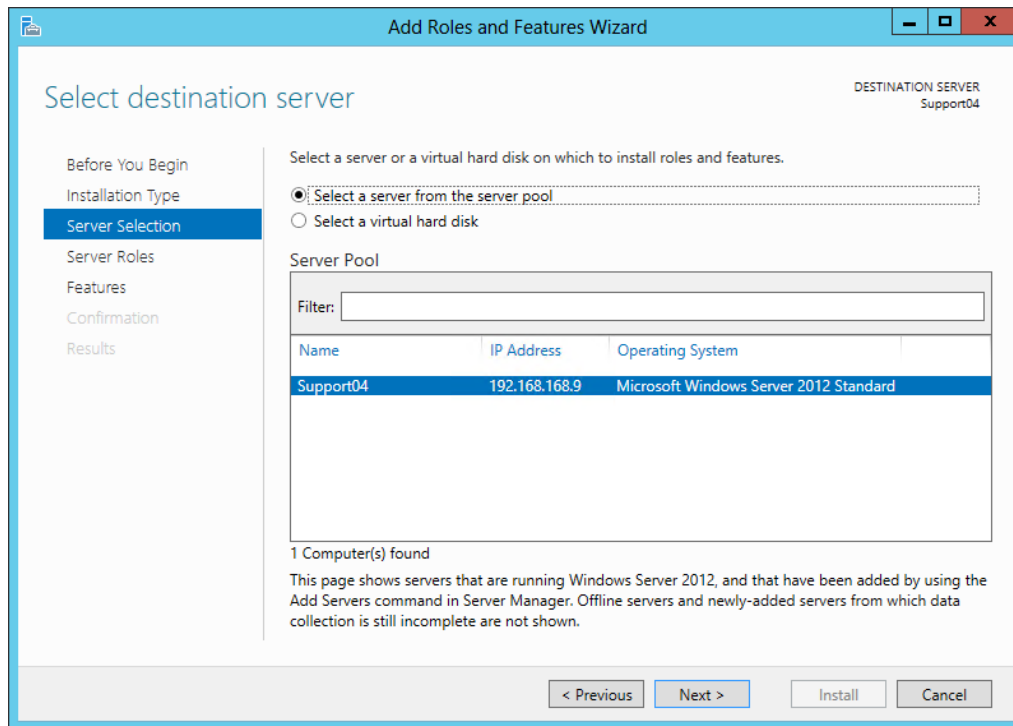
2. On the Select installation type screen, select **Add roles and Features**.
3. Select the target server. The wizard presents a Before you Begin prompt.



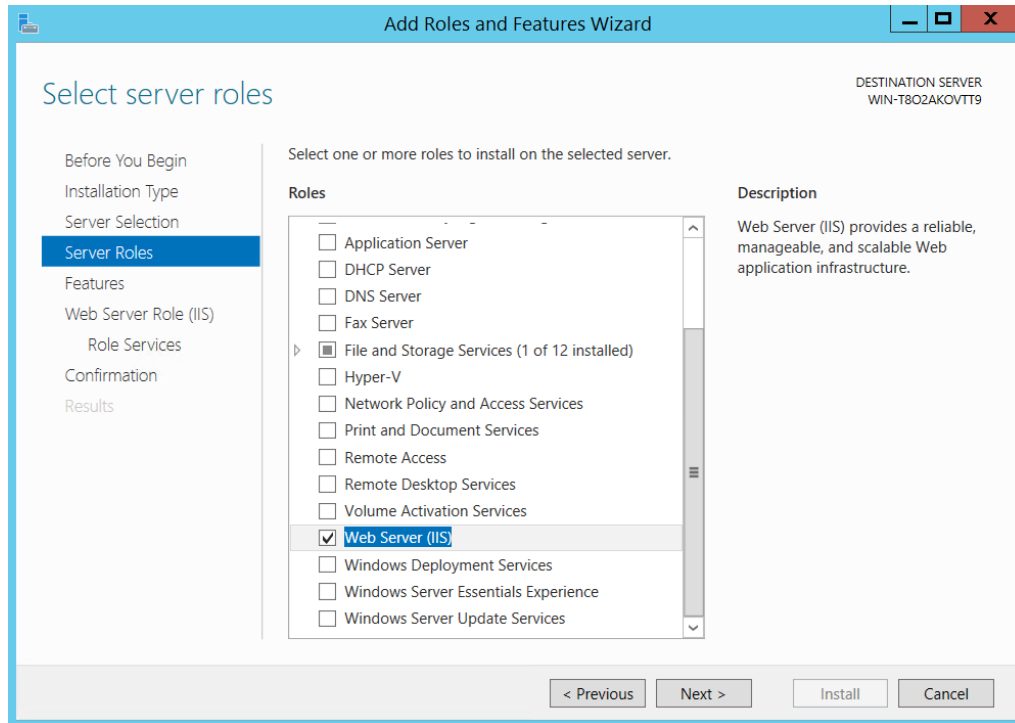
4. Click **Next**. The wizard advances to the Installation Type prompt.



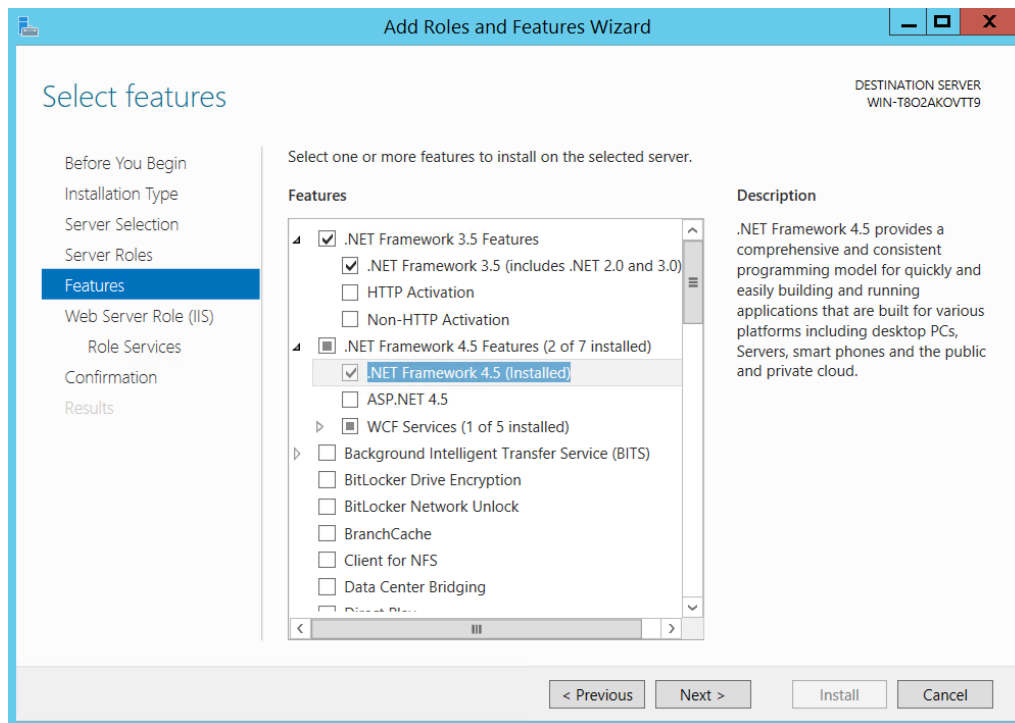
5. Select **Role-based or feature-based installation**.
6. Click **Next**. The wizard advances you to the Server Selection prompt.



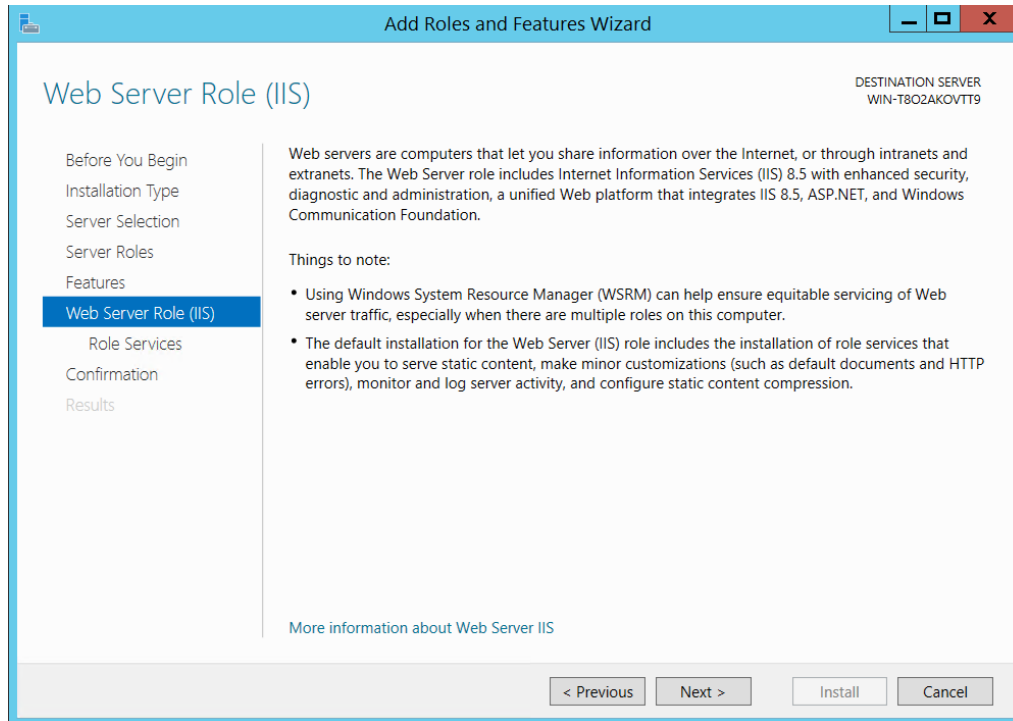
7. Select your server and click **Next**. The wizard advances you to the Server Roles prompt.



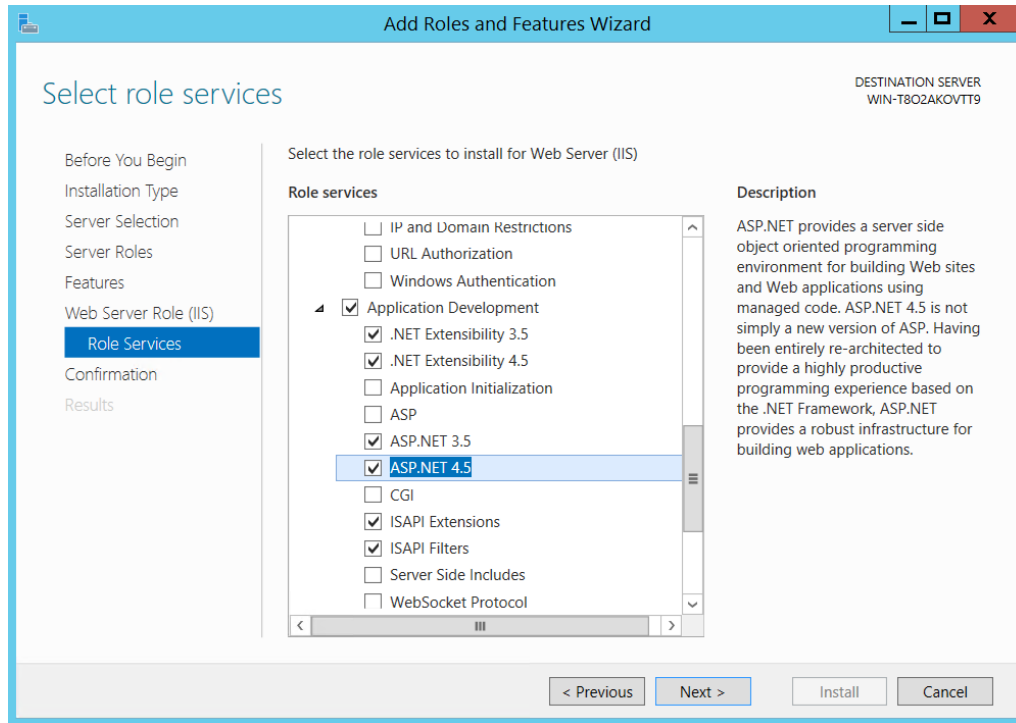
8. Select **Web Server (IIS)** and click **Next**. The wizard advances you to the Features prompt.



9. Select the **.NET Framework Framework 3.5** and **.NET Framework 4.5** options. The wizard prompts you to confirm for each option.



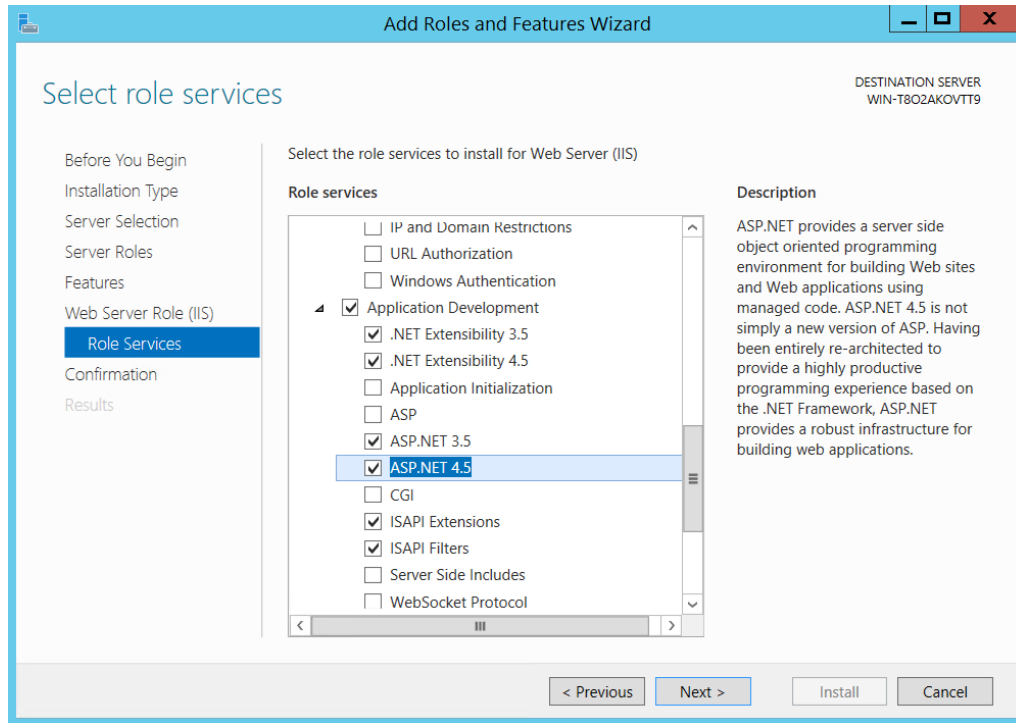
10. Click **Next**. Repeat this confirmation step for the .NET 4.5 server role. The Wizard advances you to the Select Role Services prompt.



11. Select both **ASP .NET 3.5** and **ASP .NET 4.5** options. The wizard advances you to the Confirmation Prompt.
12. Review the selections and then click **Install**.
13. Allow the installation process to complete, review the results that display, and then click **Close**.

To Install .NET Framework 4.5: Regics Only

1. Repeat Steps 1-10 from the [Windows Server 2012/2012 R2](#) section.
2. Once expanded, select both the **.NET Framework 4.5** and **ASP.NET 4.5** options and click **Next**.



3. Review the selections and then click **Install**.
4. Allow the installation process to complete, review the results that display, and then click **Close**.

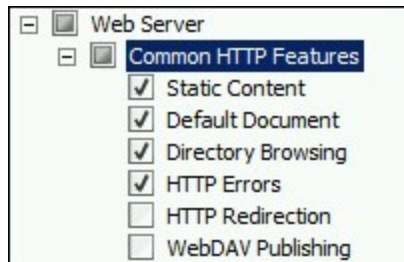
To Add Role Services

When adding IIS using the Add Roles Wizard, only the default installation is executed, which has a minimum set of role services. For EMS products, it is necessary to add role services for the programs to function properly. If role services are added after installing IIS, the Server Administrator will need to navigate to the Role Services page by following the above directions then clicking Next.

Select the following IIS Role Services to be installed:

- [Common HTTP Features](#)
- [Application Development](#)
- [Health and Diagnostics](#)
- [Security](#)
- [Performance](#)
- [Management Tools](#)

Common HTTP Features



1. **Static Content** – Static Content lets the Web server publish static Web file formats, such as HTML pages and image files. Use Static Content to publish files on a Web server that users can then view using a Web browser.
2. **Default Document** – Default Document lets organizations configure a default file for the Web server to return when users do not specify a file in a URL. Default documents make it easier and more convenient for users to reach an organizations Web site.
3. **Directory Browsing** – Directory Browsing lets users see the contents of a directory on a Web server. Use Directory Browsing to enable an automatically generated list of all directories and files available in a directory when users do not specify a file in a URL and default documents are either disabled or not configured.
4. **HTTP Errors** – HTTP Errors lets organizations customize the error messages returned to users' browsers when the Web server detects a fault condition. Use HTTP errors to give users a better user experience when they run up against an error message. Consider providing users with an e-mail address for staff who can help them resolve the error.

Application Development

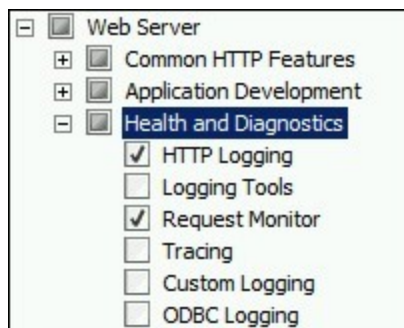


1. **ASP.NET** – ASP.NET provides a server side object-oriented programming environment for building Web sites and Web applications that use managed code. ASP.NET is not just a new version of ASP. ASP.NET provides a robust infrastructure for building Web applications, and it has been completely re-architected to provide a highly productive programming experience based on the .NET Framework.
2. **.NET Extensibility** – .NET Extensibility lets managed code developers change, add, and extend Web server functionality in the request pipeline, the configuration, and the UI. Developers can use the

familiar ASP.NET extensibility model and rich .NET APIs to build Web Server features that are just as powerful as those written using the native C++ APIs.

3. **ISAPI Extensions** – Internet Server Application Programming Interface (ISAPI) Extensions provides support for dynamic Web content development using ISAPI extensions. An ISAPI extension runs when requested, just like any other static HTML file or dynamic ASP file. Since ISAPI applications are compiled code, they are processed much faster than ASP files or files that call COM+ components.
4. **ISAPI Filters** – Internet Server Application Programming Interface (ISAPI) Filters provides support for Web applications that use ISAPI filters. ISAPI filters are files that can extend or change the functionality provided by IIS. An ISAPI filter reviews every request made to the Web server, until the filter finds one that it needs to process.

Health and Diagnostics



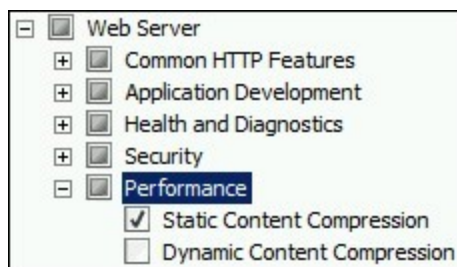
1. **HTTP Logging** – HTTP Logging provides logs site activity for this server. When a loggable event (usually an HTTP transaction) occurs, IIS calls the selected logging module, which then writes to one of the logs stored in the file system of the Web server. These logs are kept in addition to those provided by the operating system.
2. **Request Monitoring** – Request Monitor provides infrastructure to monitor Web application health by capturing information about HTTP requests in an IIS worker process. Administrators and developers can use Request Monitor to understand which HTTP requests are executing in a worker process when the worker process has become unresponsive or very slow.

Security



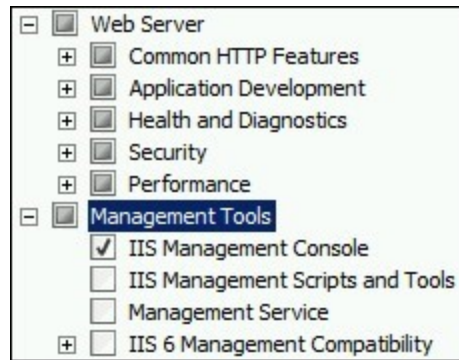
1. **Windows Authentication** – Windows Authentication is a low cost authentication solution for internal Web sites. This authentication scheme allows administrators in a Windows domain to take advantage of the domain infrastructure for authenticating users. Do not use Windows authentication if users who must be authenticated access an organization's website from behind firewalls and proxy servers.
2. **Request Filtering** – Request Filtering screens all incoming requests to the server and filters these requests based on rules set by the administrator. Many malicious attacks share common characteristics, such as very long URLs, or requests for an unusual action. Filtering requests, can attempt to reduce the impact of these types of attacks.

Performance



Static Content Compression—Static Content Compression provides infrastructure to configure HTTP compression of static content. This provides more efficient use of bandwidth. Unlike dynamic responses, compressed static responses can be cached without degrading CPU resources.

Management Tools



IIS Management Console—IIS Manager provides infrastructure to manage IIS by using a graphical user interface. IIS Manager can be used to manage a local or remote Web server that runs IIS.

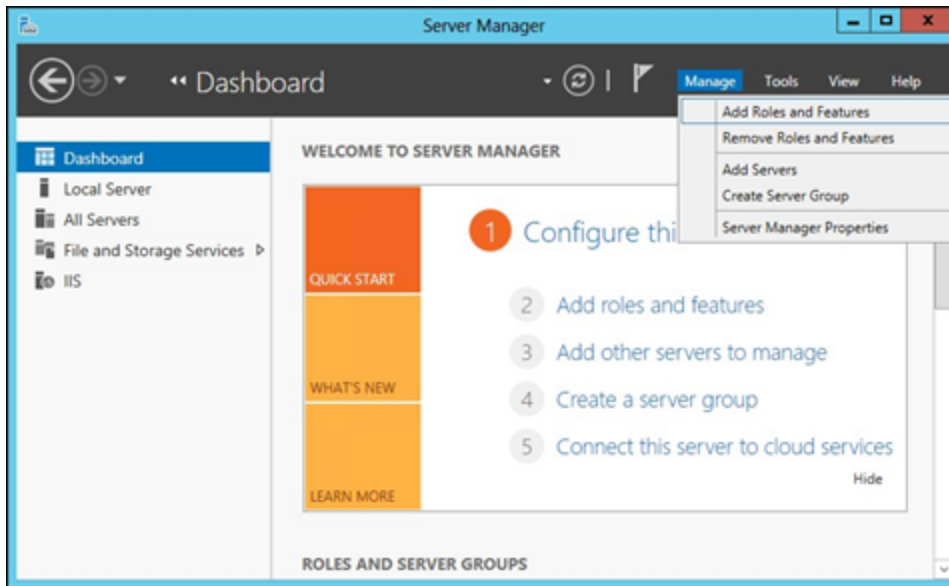
CHAPTER 18: Install .NET Framework for Windows Server 2012/2012 R2

This topic provides information on the following:

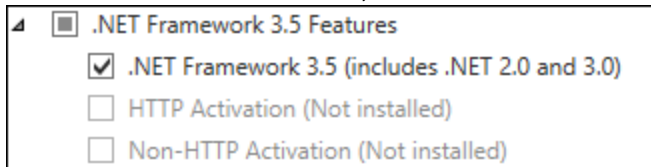
- [Install .NET Framework 3.5 and .NET Framework 4.5](#)
- [Install .NET Framework 4.5: Regics Only](#)

Install .NET Framework 3.5 and .NET Framework 4.5

1. In Server Manager, click **Manage** and then select **Add Roles and Features** to start the Add Roles and Features Wizard.



2. In the Confirm Installation Selections interface, review the selections and then click **Install**.
3. Allow the installation process to complete and then click **Close**.
4. On the Select installation type screen, select **Role-based or feature-based installation**.
5. Select the target server.
6. On the **Select Features** screen, check the box next to **.Net Framework 3.5 Features**.

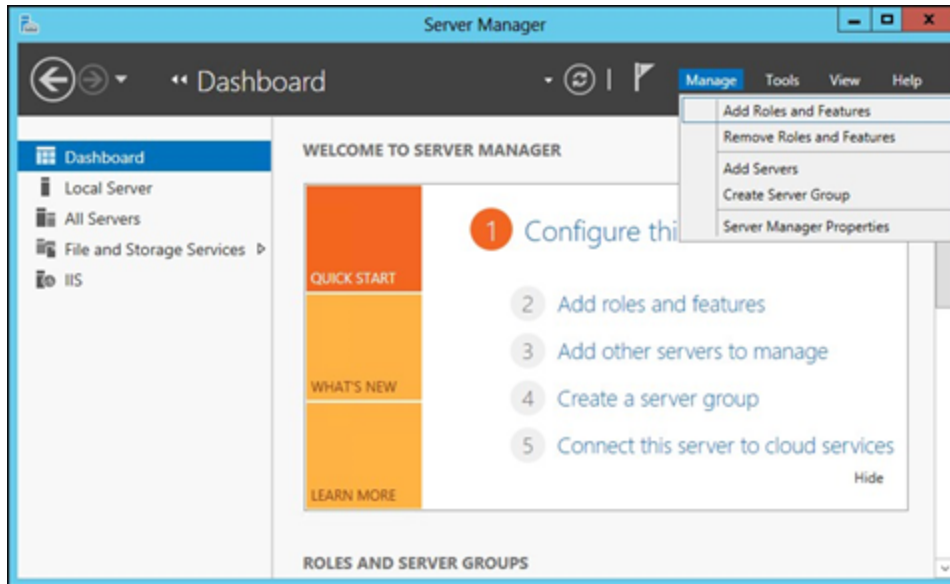


7. In the Select Features interface, expand **.NET Framework 3.5 Features**.

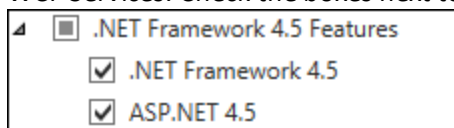
- Once expanded, there will be three check boxes. One for .NET Framework 3.5 and the other two for HTTP Activation and Non-HTTP Activation. Check the box next to **.NET Framework 3.5** and click **Next**.

Install .NET Framework 4.5: Regics Only

- In Server Manager, click **Manage** and then select **Add Roles and Features** to start the Add Roles and Features Wizard.



- On the Select installation type screen, select **Role-based or feature-based installation**.
- Select the target server.
- On the Select Features screen, check the box next to **.Net Framework 4.5 Features**.
- In the Select Features interface, expand **.NET Framework 4.5 Features**.
- Once expanded, there will be three check boxes. These will be .NET Framework 4.5, APS.NET 4.5 and WCF Services. Check the boxes next to **.NET Framework 4.5** and **ASP.NET 4.5** then click **Next**.

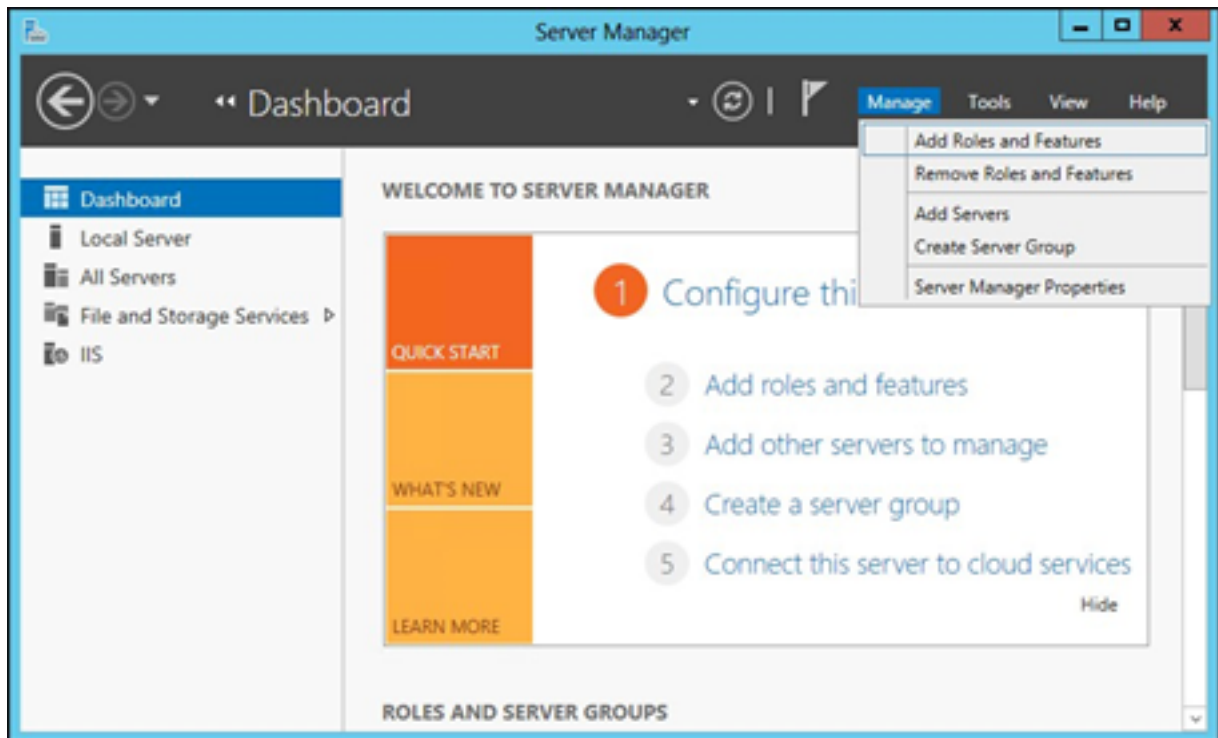


- In the Confirm Installation Selections interface, review the selections and then click **Install**.
- Allow the installation process to complete and then click **Close**.

CHAPTER 19: Install Internet Information Services (IIS)

To install IIS on a Windows Server 2012, do the following:

1. In Server Manager, click Manage and then select Add Roles and Features to start the Add Roles and Features Wizard.



2. On the Select installation type screen, select **role-based** or **feature-based** installation.
3. Select the target server.
4. On the Select Roles screen, check the box next to **Web Server (IIS)**. The Web Server (IIS) role in Windows Server 2012 provides a secure, easy-to-manage, modular and extensible platform for reliably hosting websites, services, and applications.
5. No additional features are needed for IIS, so click **Next**.
6. Customize your installation of IIS by [verifying the Role Services are selected](#) and then click Next:
7. In the Confirm Installation Selections interface, review the selections and then click **Install**.
8. Allow the installation process to complete and then click **Close**.

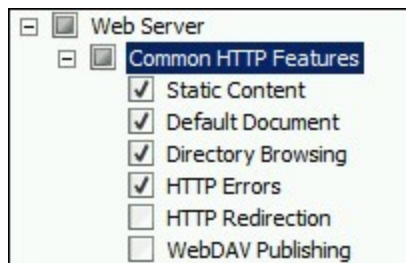
CHAPTER 20: Add Role Services

1. In Server Manager, click **Manage** and then select **Add Roles and Features** to start the Add Roles and Features Wizard.
2. On the Select installation type screen, select **Role-based or feature-based installation**.
3. Select the target server.
4. On the Select Roles screen, expand **Web Server (IIS)**.

Select the following IIS Role Services to be installed:

- [Common HTTP Features](#)
- [Application Development](#)
- [Health and Diagnostics](#)
- [Security](#)
- [Performance](#)
- [Management Tools](#)

Common HTTP Features



1. **Static Content** – Static Content lets the Web server publish static Web file formats, such as HTML pages and image files. Use Static Content to publish files on a Web server that users can then view using a Web browser.
2. **Default Document** – Default Document lets organizations configure a default file for the Web server to return when users do not specify a file in a URL. Default documents make it easier and more convenient for users to reach an organizations Web site.
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Application Development



1. **ASP.NET** – ASP.NET provides a server side object-oriented programming environment for building Web sites and Web applications that use managed code. ASP.NET is not just a new version of ASP. ASP.NET provides a robust infrastructure for building Web applications, and it has been completely re-architected to provide a highly productive programming experience based on the .NET Framework.
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4. **ISAPI Filters** – Internet Server Application Programming Interface (ISAPI) Filters provides support for Web applications that use ISAPI filters. ISAPI filters are files that can extend or change the functionality provided by IIS. An ISAPI filter reviews every request made to the Web server, until the filter finds one that it needs to process.

Health and Diagnostics



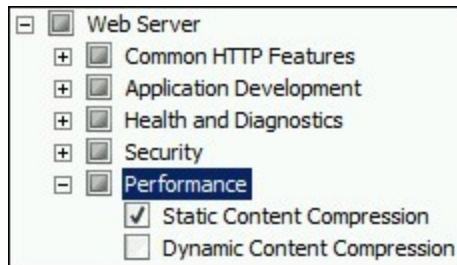
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2. **Request Monitoring** – Request Monitor provides infrastructure to monitor Web application health by capturing information about HTTP requests in an IIS worker process. Administrators and developers can use Request Monitor to understand which HTTP requests are executing in a worker process when the worker process has become unresponsive or very slow.

Security



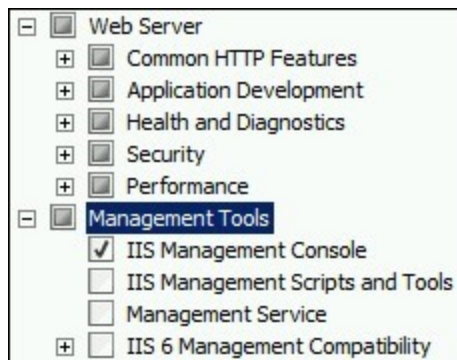
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Performance



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Management Tools

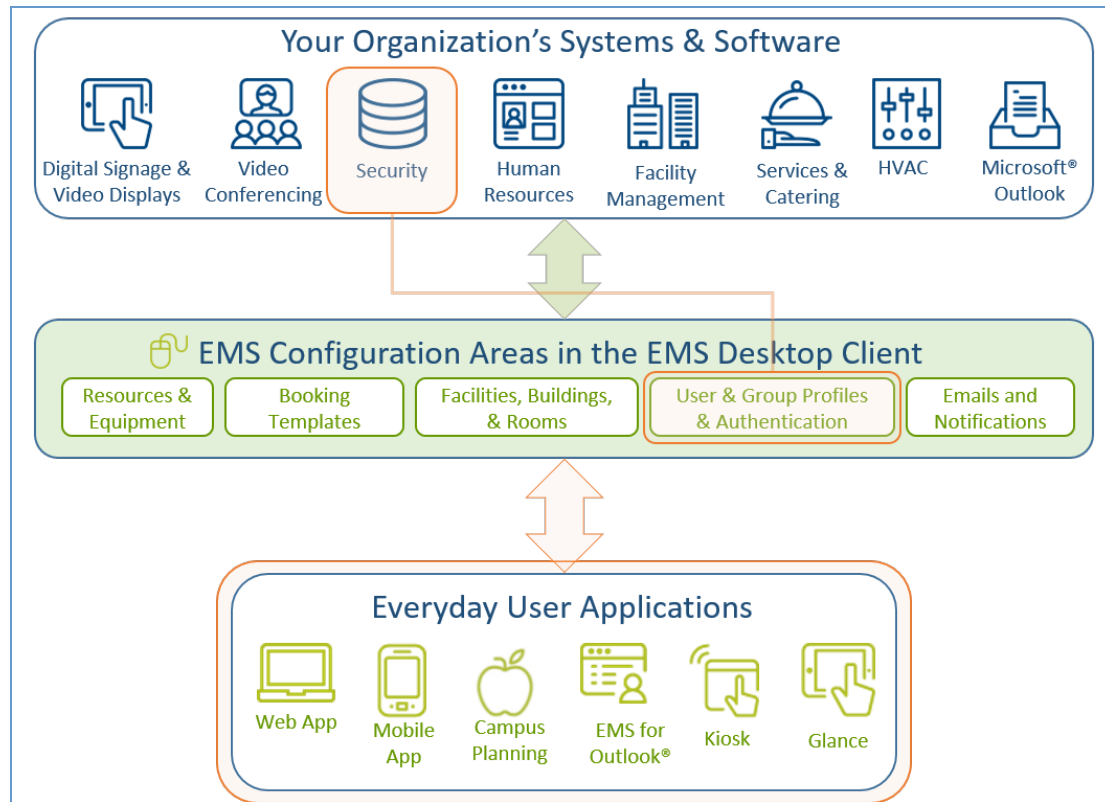


IIS Management Console – IIS Manager provides infrastructure to manage IIS by using a graphical user interface. IIS Manager can be used to manage a local or remote Web server that runs IIS.

CHAPTER 21: Introduction to EMS Integrated Authentication

The EMS Integrated Authentication component provides single-sign-on capability using Integrated Windows Authentication, your organization’s portal, or LDAP. The Integrated Authentication Setup Guide lists the steps you must take to configure these Integrated Authentication options. If you are unsure whether your organization is licensed for Integrated Authentication or you would like to learn more about it, please contact your Account Executive.

The diagram below shows how your organizations' existing security software and systems integrate with EMS software applications through configurations you set in EMS Desktop Client.



Integration Diagram

When configuring integrated authentication using this component, you can use the following methods:

- [Integrated Windows Authentication](#)
- [Portal or Federated Authentication](#)
- [LDAP Authentication](#)

What is Integrated Windows Authentication?

Integrated Windows Authentication (IWA) is a built-in Microsoft Internet Information Services (IIS) authentication protocol that can be used to automatically authenticate and sign-in a user to EMS Web App. Integrated Windows Authentication works only with Internet Explorer and is best used on intranets where all clients accessing EMS Web App are within a single domain. When a domain user who is logged on to a networked PC accesses an EMS Everyday User application, such as EMS Web App, EMS Mobile App, or EMS for Outlook, their Active Directory credentials (Domain\User ID) are compared against corresponding Domain\User ID information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be automatically logged in.

For a more detailed explanation of the authentication methods outlined above, see [Integrated Windows Authentication](#).

What is Portal or Federated Authentication?

The Portal Authentication method provides EMS Web App single sign-on capability using your organization's portal (e.g., CAS, Shibboleth, SiteMinder, Plumtree, uPortal, etc.). When a user logged into your portal accesses EMS Web App, a predefined user-specific variable (e.g., email address, employee/student ID, network ID, etc.) captured by your portal/sign-on page is compared against corresponding information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be automatically logged-into EMS Web App.



Note:

The Field Used to Authenticate Everyday User parameter (within **System Administration > Settings > Parameters > Everyday User Applications** tab) is used by EMS Web App to determine which value should be used for authentication.

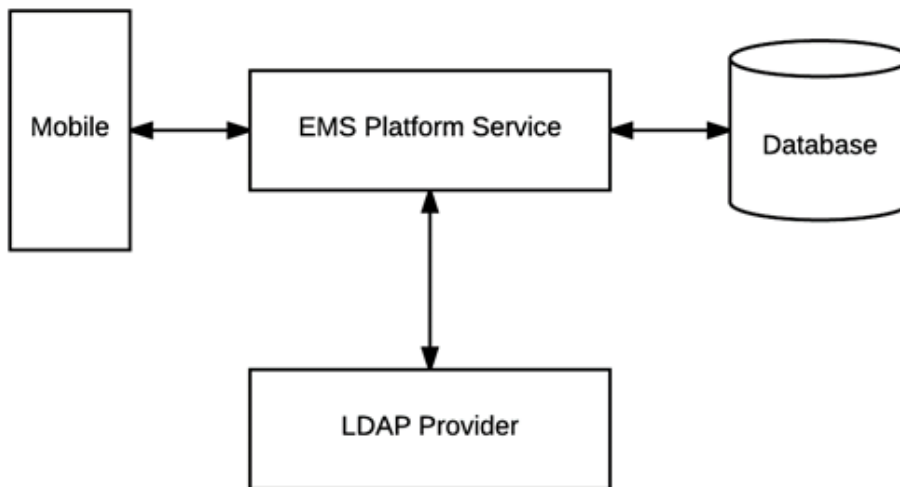
Several built-in authentication methods to pass-in credentials are available including:

- Server Variable (Header Variable)
- Session
- Form
- Cookie
- Query String
- Federated (SAML)

For a more detailed explanation of the authentication methods outlined above, see [Portal Authentication Methods](#).

What is LDAP Authentication?

Lightweight Directory Access Protocol (LDAP) is an application protocol for querying directory information. The LDAP Authentication method provides single-sign-on capability using your organization's LDAP environment and can be used in both intranet and internet deployments of EMS Everyday applications such as EMS Web App and EMS Mobile App.



The LDAP Authentication topic covers the following information related to LDAP configuration:

- [Configure EMS Web App to Use LDAP Authentication](#)
- [Configure EMS Web App Security](#)
- [Configure Communication Options](#)
- [Core Properties](#)
- [Non-AD Config](#)
- [LDAP Queries](#)
- [Save Your Configuration](#)
- [Test Your Configuration](#)
- [Configure Authentication for EMS Mobile App](#)

When a user logs into EMS Web App or EMS Mobile App with their User ID and Password, their credentials are authenticated against LDAP and compared against corresponding user information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be logged in to the application, inheriting any Everyday User Process Template rights to which their LDAP Group has been assigned.

**Note:**

- The EMS Web App LDAP-Process Template assignment process requires that your implementation of LDAP stores group information (e.g., staff, student, department, etc.) as a Directory Service object containing a property (i.e., member) that contains the users that belong to your various groups.
- The Field Used to Authenticate Everyday User parameter (within **System Administration > Settings > Parameters > Everyday User Applications** tab) is used by the applications to determine which value should be used for authentication.

Contact Customer Support

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

**Important!**

If you do not have a customer login, register [here](#).

CHAPTER 22: Integrated Authentication Considerations

When you purchase the Integrated Authentication Service, you are able to use LDAP Integration, Integrated Authentication (IA), or Portal Authentication. Integrated and Portal Authentications are true Single Sign-On (SSO) solutions; LDAP is not. These methods are not typically used together. This section explains how each one works, along with pros and cons for each method.

LDAP Integration

LDAP integration allows you to bypass creating individual web users for your organization. By configuring EMS to query your LDAP groups, you can use LDAP groups to assign web template permissions. Your users would just use their windows credentials to login to the site. After creating a web user account (most data is pre-populated from their LDAP account), they receive the template permissions granted to their LDAP group.

Pros

- No need to create/maintain individual accounts for web users. Mass assign process templates.

Cons

- Requires LDAP groups to be precisely defined and maintained to ensure proper access. EMS does not create or update LDAP groups, so product may require assistance from LDAP/Exchange administrators.
- NOT Single Sign-on: users must enter windows credentials on each visit.

Integrated Authentication

IA is SSO. For this to work, every user must have a web user account created (manually through client/virtual piece or using our HRToolkit module). In each web account, a network ID is added. When a user visits VEMS or EMS Web App, a call is made to the machine to retrieve the windows account signed in. It compares that value to the network ID field in existing accounts, logging in users automatically. Permissions are assigned to the individual web user accounts.

Pros

- Can be true SSO – the account creation and maintenance can be completely invisible to the end user. Not reliant on Exchange/LDAP administrators.

Cons

- Requires active web user creation and maintenance: manually on the client side, manually through end-user input, or automatically through an HR feed.

Portal Authentication

With Portal Authentication, user information is passed from your existing portal to records in EMS by cookie, session string or similar. Portal Authentication is true SSO when used with our supported methods.

**Note:**

When you implement Integrated Authentication, your consultant will assist you with creating templates and web users during onsite training. If you are adding this module separately and need assistance with virtual configuration contact your account manager about purchasing training. This document is intended to explain the different authentication options available, so you can anticipate any configuration needs. If you choose LDAP Integration, you will need to create an administrator account and admin web template to access the configuration page. See the EMS Configuration Guide for questions with creating that template. Using LDAP with IA or Portal Authentication requires each user be responsible for creating/verifying their account on the first visit; SSO isn't immediate. Portal authentication can be used with LDAP, but this is atypical in most portal environments since other credentialing is available.

CHAPTER 23: Integrated Windows Authentication

Integrated Windows Authentication (IWA) is a built-in Microsoft Internet Information Services (IIS) authentication protocol that can be used to automatically authenticate and sign-in a user to EMS Web App. Integrated Windows Authentication works only with Internet Explorer and is best used on intranets where all clients accessing EMS Web App are within a single domain.

This topic provides information on the following:

- [Activate Integrated Windows Authentication for IIS 6.0](#)
- [Activate Integrated Windows Authentication for IIS 7.x/8.x](#)

**Note:**

Integrated Windows Authentication is supported for [EMS Floor Plan \(V44.1 Update 11\)](#).

See Also:

- [Integrated Authentication Overview](#)
- For more information, please review the following Microsoft TechNet articles on IWA for IIS [6.0](#), [7.0](#), and [8.0](#).
- [Connect Your Database Using Active Directory](#)

When a domain user who is logged on to a networked PC accesses an EMS Everyday User application, such as EMS Web App, EMS Mobile App, or EMS for Outlook, their Active Directory credentials (Domain\User ID) are compared against corresponding Domain\User ID information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be automatically logged in.

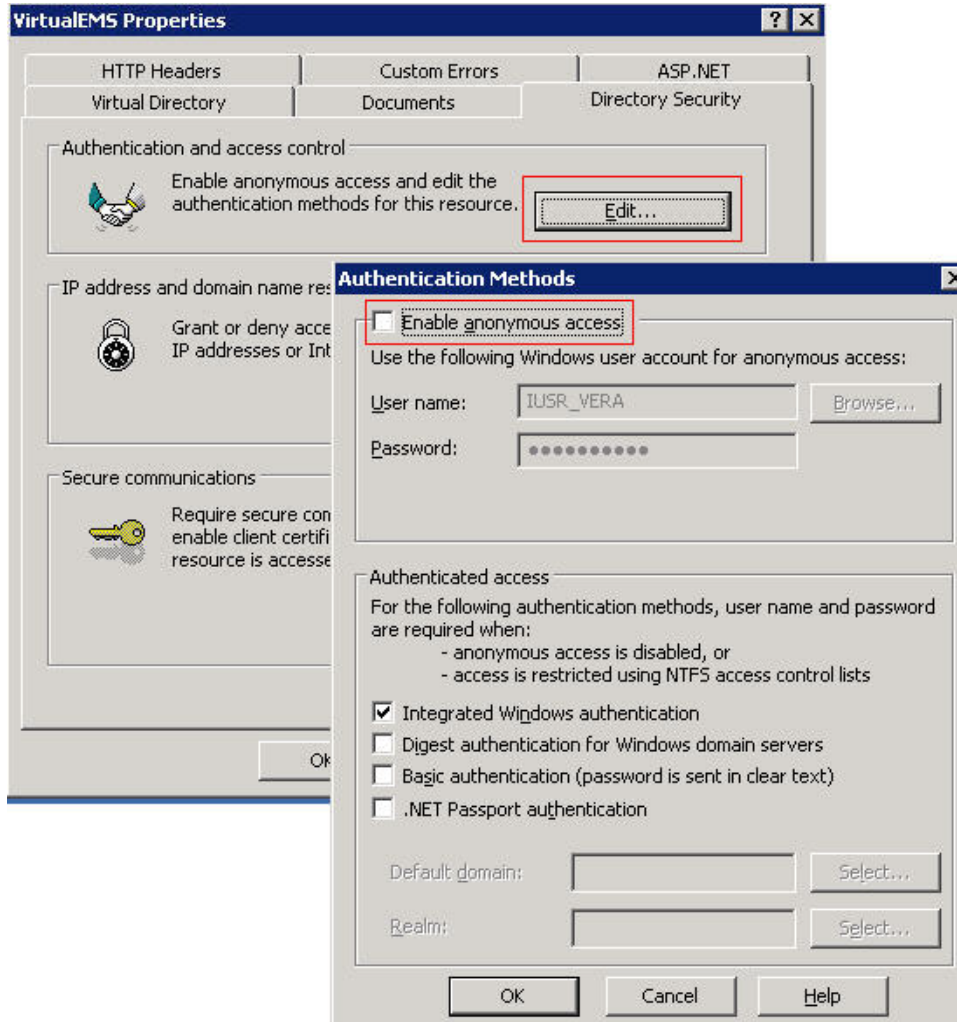
**Note:**

The Field Used to Authenticate Web User parameter (within **System Administration > Settings > Parameters > Everyday User Applications** tab) is used to determine which value should be used for authentication.

Activate Integrated Windows Authentication for IIS 6.0

1. On the web server that hosts your EMS application's site, open **IIS Manager**.
2. Locate your EMS application's site.
3. Right-click your EMS application's site and choose **Properties**. The Properties screen will open.

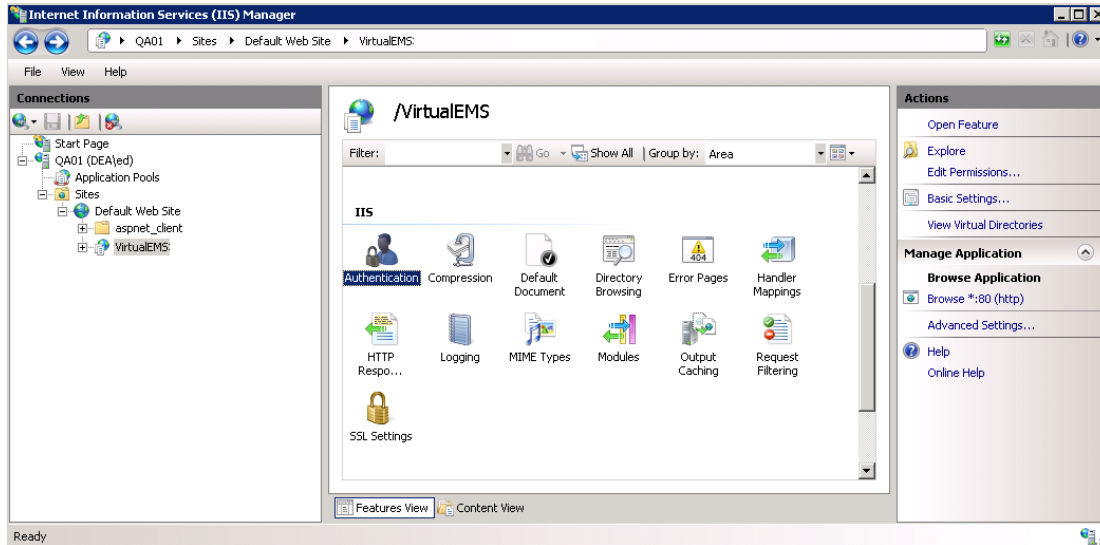
- Go to the **Directory Security** tab and click the **Edit** button under the Authentication and access control section. The Authentication Methods screen will open.
- Uncheck the **Enable anonymous access** option. The **Integrated Windows authentication** option should be the only option checked.



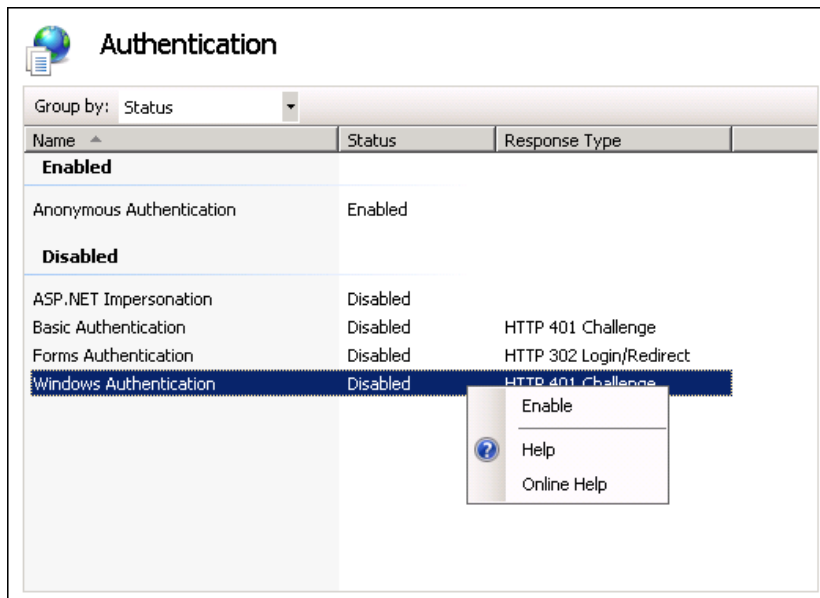
- Click **OK** to exit the Authentication Methods screen. Click **OK** again to exit the Properties screen. You have completed the necessary IIS configuration steps for IIS 6.0.

Activate Integrated Windows Authentication for IIS 7.x/8.x

1. On the web server that hosts your EMS application's site, open **IIS Manager**.
2. Locate and highlight your EMS application's site.



3. Double-click the **Authentication** option in the IIS section.



4. Right-click the **Windows Authentication** option and select **Enable**.
5. Right-click the **Anonymous Authentication** option and select **Disable**.
6. You have completed the necessary IIS configuration steps for IIS 7.

CHAPTER 24: Manage Everyday Users For Integrated Authentication

In order to make a reservation in EMS Everyday User Applications, such as EMS Web App, EMS Mobile App, and EMS for Outlook, a user must have an active Everyday User account with appropriate security and process templates.

In EMS, you can create Everyday User accounts as follows:

- [Manually Create Everyday User Accounts](#)
- [Automatically Create Everyday User Accounts](#)
- [Modify Existing Everyday User Accounts](#)

Manually Create Everyday User Accounts

Everyday User accounts can be created manually by EMS Administrators within EMS Desktop Client or by anonymous Everyday Users on their respective EMS Everyday Applications.

To create Everyday User accounts in the EMS Desktop Client, see [Configure Everyday Users](#).

To configure EMS Web App to allow anonymous Everyday Users to request an account, you adjust parameters. See also: [EMS Web App System Parameters](#).



Important!

When manually creating an Everyday User account in an Integrated Authentication environment, you must specify a value in the Everyday User Network ID field or the External Reference field. The Field Used to Authenticate Everyday User parameter (within **System Administration > Settings > Parameters > Everyday User Applications** tab) is used to determine which value should be used for authentication.

Automatically Create Everyday User Accounts

Various configuration settings are available to automatically create Everyday User records (and assign the appropriate Security and Process Template(s) if applicable) when a user accesses an EMS Everyday User Application (such as EMS Web App for the first time).

EMS Web App Parameters

Within the Everyday User Applications parameters area of the EMS desktop client (**System Administration > Settings > Parameters > Everyday User Applications** tab), the following parameters must be set accordingly:

Area	Description	Value
Account Management	Auto Create Everyday User Account (for Integrated Authentication)	Yes
Account Management	Default Security Template for User	<i>Must be specified</i>
Account Management	Default Account Status for Newly-Created User	Active

Portal/Federated Authentication Parameters

For organizations using Portal or Federated authentication, EMS supports a simple account provisioning strategy. When using Auto Create, EMS requires that a Everyday User account is provisioned with a name, an email address and a NetworkId (some authentication key). Otherwise, the user will be redirected to the Account Management page and be asked to manually enter the required information. In addition to the required fields, EMS also supports collecting phone, fax, and an external reference value. The parameters below are meant to help create a more complete Everyday User. The values for each of the parameters are to be determined by the information populated by your portal.

Area	Description	Value
Authentication	Portal Authentication Email Variable	<i>Must be specified</i>
Authentication	Portal Authentication External Reference Variable	<i>Must be specified</i>
Authentication	Portal Authentication Fax Variable	<i>Must be specified</i>
Authentication	Portal Authentication Name Variable	<i>Must be specified</i>
Authentication	Portal Authentication Phone Variable	<i>Must be specified</i>

HR Toolkit (for EMS Workplace, EMS Campus, EMS Enterprise, EMS District, and EMS Legal only)

The HR Toolkit is an optional component that allows you to automate the creation and maintenance of Everyday User records in EMS using an outside employee data source like your HR system or another data store within your organization. Please refer to the [HR Toolkit Installation Instructions](#) for information. If you are not licensed for the HR Toolkit, but would like to learn more about it, please contact your Account Executive.

Automatic Template Assignment to Users

The Default Security Template for User parameter shown above is used to automatically assign the correct Everyday User Security Template to new Everyday User records.

You can automatically assign default Everyday User Process Templates when a new Everyday User account is created. To automatically assign a Everyday User Process Template to new Everyday Users, select the Available to New Everyday Users option within your Everyday User Process Template(s) (**Configuration > Everyday User Applications > Everyday User Process Templates (Edit the template > Process Templates tab)**)).

EMS customers using the LDAP Authentication method can use an alternate method to assign a Everyday User Process Template to a Everyday User based on the LDAP Group(s) to which the user belongs. This approach can be used in addition to or in lieu of the Everyday User Process Template assignment approach discussed above. Please see the [LDAP Authentication](#) section for configuration instructions.

Modify Existing Everyday User Accounts



Important!

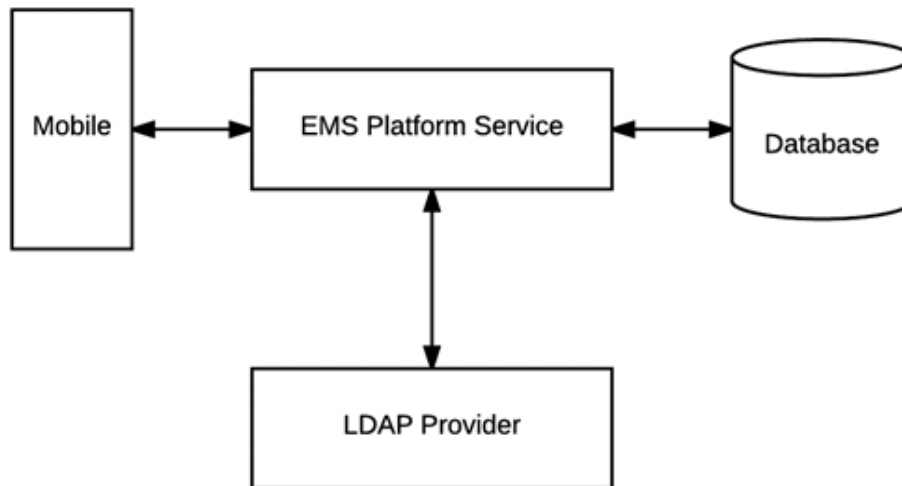
EXISTING EMS CUSTOMERS

Before activating any Integrated Authentication option, the **Network ID** field or **External Reference** field must be populated on all existing Everyday User records. Ignoring this step may result in duplicate Everyday User records.

CHAPTER 25: Configure EMS Web App to Use LDAP Authentication

Overview

Lightweight Directory Access Protocol (LDAP) is an application protocol for querying directory information. The LDAP Authentication method provides single-sign-on capability using your organization's LDAP environment and can be used in both intranet and internet deployments of EMS Everyday applications such as EMS Web App and EMS Mobile App.



This topic provides information on the following:

- [Configure EMS Web App to Use LDAP Authentication](#)
- [Configure EMS Web App Security](#)
- [Configure Communication Options](#)
- [Core Properties](#)
- [Non-AD Config](#)
- [LDAP Queries](#)
- [Save Your Configuration](#)

- [Test Your Configuration](#)
- [Configure Authentication for EMS Mobile App](#)

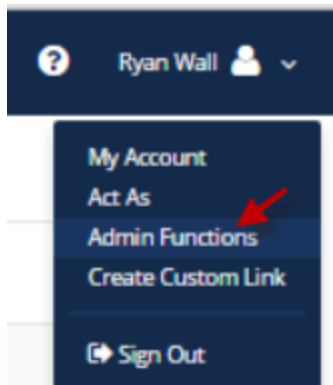
When a user logs into EMS Web App or EMS Mobile App with their User ID and Password, their credentials are authenticated against LDAP and compared against corresponding user information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be logged in to the application, inheriting any Everyday User Process Template rights to which their LDAP Group has been assigned.

**Note:**

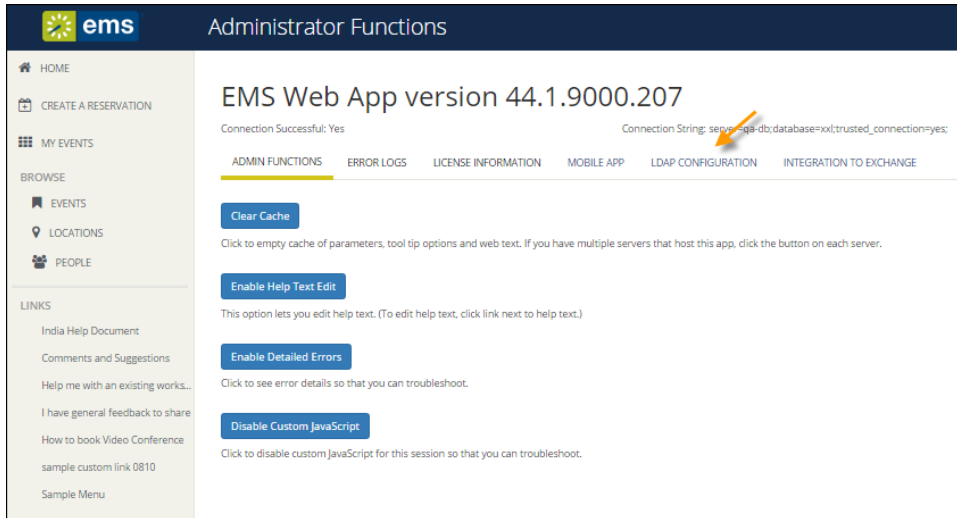
- The EMS Web App LDAP-Process Template assignment process requires that your implementation of LDAP stores group information (e.g., staff, student, department, etc.) as a Directory Service object containing a property (i.e., member) that contains the users that belong to your various groups.
- The Field Used to Authenticate Everyday User parameter (within **System Administration** > **Settings** > **Parameters** > **Everyday User Applications** tab) is used by the applications to determine which value should be used for authentication.

Configure EMS Web App to Use LDAP Authentication

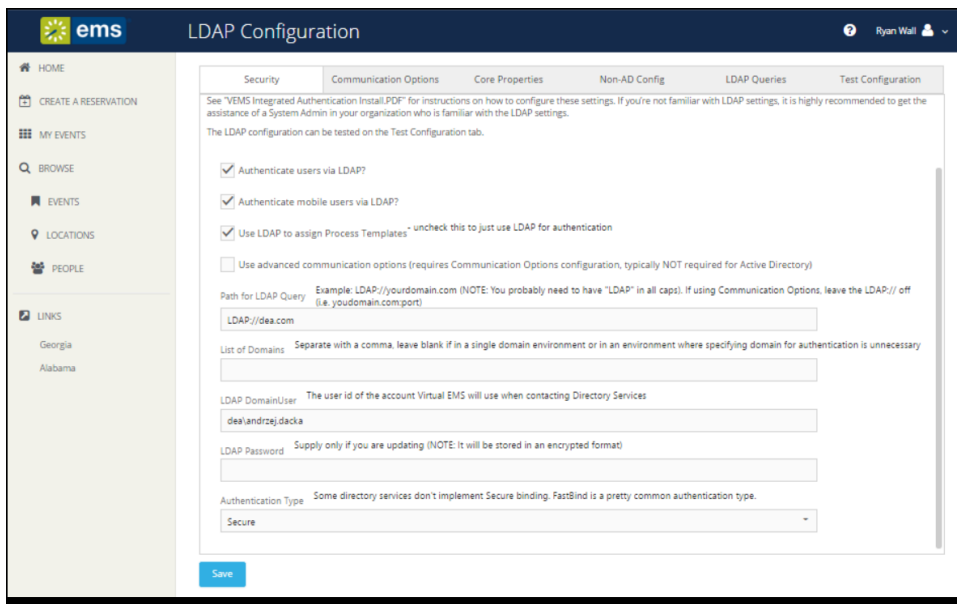
1. Log into EMS Web App with a User that belongs to an Everyday User Security Template containing the **Web Administrator** role (controlled in the EMS Desktop Client under **Configuration** > **Everyday User Applications** > **Everyday User Security Templates**).
See Also: [Configure Security Templates](#).
2. From the User Options, select **Admin Functions**.



3. Then click the **LDAP Configuration** tab.



4. The LDAP Configuration window appears, presenting multiple tabs for various settings.



Configure EMS Web App Security

On the **Security** tab:

1. Select the **Authenticate users via LDAP** checkbox to enable LDAP authentication.
2. If LDAP will be used to assign Everyday User Process Templates to your Web Users, select the **Use LDAP to assign Process Templates** checkbox.

3. **Use advanced communication options:** Skip this step for Active Directory environments. Enabling this checkbox requires that you complete the settings on the **Communication Options** tab.
4. In the **Path for LDAP Query** field, specify a valid LDAP path (example – LDAP://YourCompany.com)
5. **List of Domains:** Skip this step if your organization uses a single domain. Otherwise, provide a comma separated list of your domains.
6. In the **LDAP Domain\User** field, enter a Domain User account that has rights to query LDAP (example – YourDomain\User)
7. In the **Password** field, enter a valid Password for the User Account entered in the previous step.
8. Specify the appropriate LDAP **Authentication Type** for your environment.

**Note:**

The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.

Configure Communication Options

**Important!**

It is recommended that this tab only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP. If you're not familiar with the LDAP settings, it is highly recommended to get the assistance of a System Admin in your organization who is familiar with the LDAP settings.

The Communication Options tab includes fields that define how to fetch a Group or a User when sending communications from the EMS Desktop Client. You can also set the SSL configurations, including the Security Certificate Path. Checking the **Use SSL** box will force communication to use SSL.

- **Certificate Path:** If there is a specific certification that you want to use to validate your authentication.
- **Authentication Type:** Type of authentication that your LDAP server will use during the binding process. Basic is the default because it is the most common.
- **Search Root:** The root is the level at which your search will begin.
- **User Search Filter:** Specifies the filter to use when performing the user search.
Example: (&(objectClass=Person)(SAMAccountName={0})) or (&(objectClass=Person)(uid={0}))
- **Group Search Filter:** Specifies the filter to use when performing the group search.
Example: (&(objectClass=Person)(objectClass=user))

- **Protocol Version:** Insert the current version number here. The default is 3, as the current version should be 3.

Core Properties



Important!

It is recommended that this tab only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP. If you're not familiar with the LDAP settings, it is highly recommended to get the assistance of a System Admin in your organization who is familiar with the LDAP settings.

Indicate whether your LDAP implementation is Active Directory. These properties are set to the common defaults, but can be changed here if the LDAP properties differ from the defaults displayed.

- **LDAP Name Property:** The property for user name on the user record in LDAP that will be displayed. Displayname is the default, as it is the most common.
- **LDAP Phone Property:** The property for the phone number on the user record in LDAP that will be displayed. Telephonenumber is the default, as it is the most common.
- **Domain to append to users:** This field is unnecessary unless the domain of your user is different from the domain returned from the query.
- **Field for LDAP Group Lookup:** This identifies the EMS property that should be utilized when performing the search. For example, if you use LDAP solely to assign templates and you want the EMS Web App to look up group membership using a field other than the login name, then you must enter that field's name here.

Non-AD Configuration



Important!

It is recommended that this tab only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP. If you're not familiar with the LDAP settings, it is highly recommended to get the assistance of a System Admin in your organization who is familiar with the LDAP settings.

If your LDAP implementation is not Active Directory, use these fields to redefine the LDAP property names used when searching directory information.

- **LDAP Account/User ID Property:** The property in your LDAP store that contains the user name.
Example: If sameaccountname=xxxx, then enter sameaccountname
- **Full LDAP User ID Format:** Leave blank unless authentication requires a full path.
Example: cn={0},ou=staff,o=yourdomain
- **LDAP Group Category:** The property in your LDAP store that contains the group category.
Example: If filter should be objectClass=groupOfNames, then property should be groupOfNames
- **LDAP Group Name:** The property in your LDAP store that contains the group name.
- **LDAP Group Member Name:** The property in your LDAP store that contains the name of a single member in the group.
Example: If member property is member=jdoe, then property should be member
- **LDAP Group Member User Name Attribute:** The property of the user record that corresponds to the group's member property to determine group membership.

LDAP Queries



Important!

It is recommended that this tab only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP. If you're not familiar with the LDAP settings, it is highly recommended to get the assistance of a System Admin in your organization who is familiar with the LDAP settings.

These are LDAP query overrides to fetch Groups and Users from the domain. These settings rarely need to be overridden, but can be used to customize queries.

- **LDAP query for security groups:** Query used to search for security groups in your LDAP store.
- **LDAP query to find users:** Query used to search for users in your LDAP store.
- **LDAP query for find users with space:** Query used to search for users that have spaces surrounding their user names in your LDAP store.

Save Your Configuration

1. Click **Save**.



Note:

If you want Everyday Users to inherit Everyday User Process Templates based on the LDAP Group(s) with which they belong, see [LDAP Groups Tab](#). Otherwise, you have completed the configuration process.

2. Within EMS Desktop Client, go to the Everyday User Process Templates area (**Configuration > Web > Everyday User Process Templates**).
3. Within an Everyday User Process Template, locate the LDAP Groups tab and select the appropriate LDAP Group(s) to map to that [Everyday User Process Template](#).
4. Click **OK**.

Test Your Configuration

1. After completing configuration, navigate to the **Test Configuration** tab in the EMS Web App under LDAP Configuration.
2. Enter your Network UserId Without Domain Name.
3. Enter your Password.
4. Click **Test**.
 - a. If your configuration was successful, you will receive a message in a green box at the top that includes domain information and the words "Authentication successful" (please see example below).

```
Auth attempted with: jen.nausec Authentication successful LDAP UserName = Jen Nausec LDAP Phone = LDAP
Fax = LDAP EmailAddress = Jen.Nausec@emssoftware.com LDAP NetworkId = Jen.Nausec User belongs to the
following groups: Users,Certificate Service DCOM Access,Domain Users,Staff,VPN
Users,Testers,SupportSecurity,WirelessAccess,Hourly Billing,TFS Full Web Access,SophosUser,SupportTFS,
success
```

- b. If the configuration was unsuccessful, you will receive a prompt stating that LDAP could not be accessed. Check your logs to determine the reason for the failure.

Configure Authentication for EMS Mobile App

1. If your organization uses EMS Mobile App, click the **Mobile App** tab.
2. [Choose the LDAP option](#).

CHAPTER 26: Portal or Federated Authentication

This topic provides information on the following:

- [Portal Authentication Overview](#)
- [Installation/Configuration](#)
 - [Redirect User Log In to Your SSO Provider](#)
 - [Specify a Different Default Home Page for Guest Users](#)

Portal Authentication Overview

The Portal Authentication method provides EMS Web App single sign-on capability using your organization's portal (e.g., CAS, Shibboleth, SiteMinder, Plumtree, uPortal, etc.). When a user who is logged into your portal accesses EMS Web App, a predefined user-specific variable (e.g., email address, employee/student ID, network ID, etc.) captured by your portal/sign-on page is compared against corresponding information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be automatically logged-into EMS Web App.

**Note:**

The Field Used to Authenticate Everyday User parameter (within **System Administration > Settings > Parameters > Everyday User Applications** tab) is used by EMS Web App to determine which value should be used for authentication.

Several built-in authentication methods to pass-in credentials are available including:

- Server Variable (Header Variable)
- Session
- Form
- Cookie
- Query String
- Federated (SAML)

For a more detailed explanation of the authentication methods outlined above, see [Portal Authentication Methods](#).

Installation/Configuration

1. Within the Everyday User Applications parameters area of EMS (System Administration > Settings > Parameters (Everyday User Applications tab)), the following parameters must be set accordingly:

Area	Description	Value
Authentication	Portal Authentication Cookie Key	Required if Portal Authentication Method = Cookie
Authentication	Portal Authentication Method	Server Variable Session Form Cookie Query String
Authentication	Portal Authentication Variable	User variable to be compared against the EMS Everyday User External Reference/Network ID field

2. Direct users to the default EMS Web App page. If the default installation settings were used, the default page is:
([http://\[ServerName\]/EMSWebApp/Default.aspx](http://[ServerName]/EMSWebApp/Default.aspx))
(replace [ServerName] with the name of your web server)

Redirect User Log In to Your SSO Provider

Administrators can hide the login form on the My Home page and instead, present a single **Sign In** button that links to the override URL. Open the web.config file and locate the following code to customize the redirect:

```
<!--<add key="loginOverrideUrl" value="" />-->
```

Additionally, you can do the same for user log out:

```
<!--<add key="logoutOverrideUrl" value="" />-->
```

Changing the URL in these areas means that when users log in or out, they will pass through your SSO provider.

Specify a Different Default Home Page for Guest Users

Additionally, you can now [specify a different site home page](#) for unauthenticated users.

CHAPTER 27: Portal Authentication Methods

This topic provides information about the following:

- [Server Variable Method \(Header Variable\)](#)
- [Server Variable Method – Federated \(SAML\)](#)
 - [Method 1: Locally installed service provider](#)
 - [Method 2](#)
- [EMS Desktop Client Configuration](#)
 - [Session Method](#)
 - [Form Method](#)
 - [Cookie Method](#)
 - [Query String Method](#)



Note:

EMS applications do not natively support SAML. You must use our [Portal Authentication](#) to use SAML.

Server Variable Method (Header Variable)

Server Variable/Header Variable is a collection of variables that are set by Internet Information Server (IIS).

Applications like SiteMinder create custom server variables for portal site use.

Set the **Portal Authentication Method** parameter to Server Variable and type the appropriate variable for the **Portal Authentication Variable** parameter. Direct users to your EMS Web App Default.aspx page.

Server Variable Method – Federated (SAML)



Note:

As of Update 23 (March 2018), SAML authentication for the EMS Web App is supported through EMS Platform Services. This is now the recommended method for configuring SAML. See Also: [SAML Authentication](#).

SAML can be leveraged for authentication with your EMS applications by leveraging our portal authentication method and a service provider of your choosing.

Method 1: Locally installed Service Provider

Using this method, you install a service provider of choice on the webserver hosting the EMS web applications. All traffic is routed through that service provider (typically via an ISAPI filter). This service provider will manage all of the authentication for the user. Once the user has successfully authenticated, it will pass an identifier for the user to the EMS application using one of our portal methods. In this scenario typically the Server Variable (Header) method is used.

Method 1 Configuration Steps

1. Install and configure a service provider on the EMS web server
2. Set the service provider to protect the specified EMS web applications
3. Configure the service provider to pass the required user attributes
4. In EMS Desktop Client, configure the EMS Web App parameter “Portal Authentication Method”
5. In EMS Desktop Client configure the applicable Portal Authentication Variables.

Method 2

This method can be common if there is already a server configured with a service provider in your environment, handling authentication for other applications. In EMS Desktop Client, you can configure your application to re-direct any login requests to the other server to be authenticated. Once the user is authenticated, the server with your service provider installed sends the user back to the EMS Desktop Client with an identifier for the user in the header, or within a cookie. The EMS application reads this header, or cookie value, and leverages portal authentication to sign the user in with the matched credentials.

Method 2 Configuration Steps

1. Install and configure a service provider on the EMS web server
2. Set the service provider to protect the specified EMS web applications
3. Configure the service provider to pass the required user attributes
4. In EMS Desktop Client configure the EMS Web App parameter “Portal Authentication Method”
5. In EMS EMS Desktop Client, configure the applicable Portal Authentication Variables.
6. In EMS EMS Desktop Client, change the Login URL under **Configuration > Everyday User Applications > Web App Menus**.
 - a. Select **Login.aspx** and click **Edit**
 - b. Enter in the URL to your Remote Service Provider

7. Configure your remote Service provider to send the user back to the default.aspx page of the web application that the request originated from.

EMS Desktop Client Configuration

Please reference our Portal Authentication section for further details around the configuration required within EMS. There are a number of different options available. You will need to know the method that the user identifying value will be passed and the name of that value. Other values can also be passed (ie: email address and phone number) to aid in automatic web user account provisioning as well.

Session Method

A session is a way to provide/maintain user state information in an inherently stateless environment. It provides access to a session-wide cache you can use to store information.

In order to use the session method, set the Portal Authentication Method parameter to **Session** and type the appropriate variable for the Portal Authentication Variable parameter. Then you must create an asp.net web page and name it with the .aspx extension similar to the example below. The asp.net web page created must be copied into the EMS Web App root web directory. It must be copied there in order for EMS Web App to read the session variable.

You will need to pass through the user's email address or external reference to your asp.net web page.

Code example in vb.net:

```
<%@ Import Namespace="System" %>

<script runat="server" language="vb">

        Sub Page_Load(ByVal sender As System.Object,
ByVal e As System.EventArgs)

                Session.Item("EMS Web AppSession") =
                "test@emssoftware.com"

                Response.Redirect("Default.aspx")

        End Sub

</script>
```

Form Method

Forms enable client-side users to submit data to a server in a standardized format via HTML. The creator of a form designs the form to collect the required data using a variety of controls, such as INPUT or SELECT. Users viewing the form fill in the data and then click Submit to send the data to the server.

To use the form method, set the Portal Authentication Method parameter to **Form** and type the appropriate variable for the Portal Authentication Variable parameter. To create portals through a form, create a web page with a form similar to below. Once the user logs on through the portal, the form below can be submitted to log the user on to EMS Web App.

Code example in HTML:

```
<Form name="form1" method="Post" action=" http://[ServerName]/
EMSWebApp/Default.aspx ">
    <input type="hidden" id="EMS Web AppFORM" name="EMS Web AppFORM"
value="test@emssoftware.com">
    <input type="submit" value="submit">
</form>
```

Cookie Method

A cookie is a small piece of information stored by the browser. Each cookie is stored in a name/value pair called a crumb—that is, if the cookie name is "id" and you want to save the id's value as "this", the cookie would be saved as id=this.

You can store up to 20 name/value pairs in a cookie, and the cookie is always returned as a string of all the cookies that apply to the page. This means that you must parse the string returned to find the values of individual cookies. Cookies accumulate each time the property is set. If you try to set more than one cookie with a single call to the property, only the first cookie in the list will be retained.

To use the cookie method, set the Portal Authentication Method parameter to **Cookie** and type the appropriate variable for the Portal Authentication Cookie Key parameter. Then create a web page with code similar to below. Once the user logs on through the portal, take their user logon information and create a cookie. After the cookie is created send the user to your EMS Web App Default.aspx page.

Code example in Active Server Pages 2.0:

```
<%@LANGUAGE="VBSCRIPT" %>
<%
    Response.Expires = -1
    Response.Cookies("EMS Web AppCookie")("CookVal") = "test@emssoftware.com"
    Response.Cookies("EMS Web AppCookie").Path = "/"
    Response.Cookies("EMS Web AppCookie").Expires = DateAdd("m", 3, Now)
    Response.Redirect("http://[ServerName]/ EMSWebApp/Default.aspx ")
%>
```

Query String Method

A query string is information appended to the end of a page's URL. An example using portal authentication is below.

Code example:

```
http://[ServerName]/ EMSWe-  
bApp/Default.aspx?MCQS=test@emssoftware.com
```

To use the query string method, set the Portal Authentication Method parameter to **Query String** and type the appropriate variable for the Portal Authentication Variable parameter.

CHAPTER 28: Authentication Options for EMS Web App

Authentication options for the EMS Web App include:

- [Integrated Windows Authentication](#)
- [LDAP](#)
- [Portal Authentication](#)
- [SAML Authentication](#)
- [EMS Native Authentication](#)

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

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

Integrated Windows Authentication

Integrated Windows Authentication (IWA) is a built-in Microsoft Internet Information Services (IIS) authentication protocol that can be used to automatically authenticate and sign-in a user to EMS Web App. Integrated Windows Authentication works only with Internet Explorer and is best used on intranets where all clients accessing EMS Web App are within a single domain. See Also: [Integrated Windows Authentication](#).

- Login Credentials: Network ID / External Reference in web user account settings (Either of these work).
- Enabled by: Within IIS on the VEMS site, "Authentication" options, Windows Authentication enabled, Anonymous Authentication disabled.
- Configuration Page: IIS "Authentication" options.

LDAP

Lightweight Directory Access Protocol (LDAP) is an application protocol for querying directory information. The LDAP Authentication method provides single-sign-on capability using your organization's LDAP environment and can be used in both intranet and internet deployments of EMS Everyday applications, such as EMS Web App and EMS Mobile App. See Also: [LDAP Authentication](#).

- Login Credentials: Network ID / External Reference in web user account settings (This is specified by the "Field Used to Authenticate Web User" on the VEMS/EMS Web App Parameters tab).
- Enabled by: Idapconfiguration.aspx page, "Authenticate users via LDAP?" checkbox (must be logged in with Web Admin security role and have Integrated Authentication in license).
- Configuration Page: Idapconfiguration.aspx page (there are multiple tabs).
- Other Notes: EMS LDAP License is required for this to work. The web server will need access to directory server for this to work.

Portal

The Portal Authentication method provides EMS Web App single sign-on capability using your organization's portal (e.g., CAS, Shibboleth, SiteMinder, Plumtree, uPortal, etc.). When a user who is logged into your portal accesses EMS Web App, a predefined user-specific variable (e.g., email address, employee/student ID, network ID, etc.) captured by your portal/sign-on page is compared against corresponding information recorded in the **Network ID** and/or **External Reference** fields of your EMS Everyday User records. If a match exists, the Everyday User will be automatically logged-into EMS Web App. See Also: [Portal Federated Authentication](#).

- Login Credentials: Network ID / External Reference in web user account settings (this is specified by the "Field Used to Authenticate Web User" on the VEMS/EMS Web App parameters tab).
- Enabled by: Always enabled; select the appropriate entry from the "Portal Authentication Method" on the VEMS/EMS Web App Parameters page.
- Configuration Page: There are multiple different setup items in the VEMS/EMS Web App parameters under the "Authentication" area.

SAML



Note:

As of Update 23 (March 2018), SAML authentication for the EMS Web App is supported through EMS Platform Services. This is now the recommended method for configuring SAML. See Also: [SAML Authentication](#).

- Login Credentials:
- Enabled by:
- Configuration Page:
- Other Notes:

CHAPTER 29: EMS Web App Configuration Guide

EMS Web App is an optional web-based application that EMS users can use to view EMS events, and if allowed, to submit and manage reservations. As the EMS administrator, you are responsible for setting up and maintaining the necessary components for this module, including defining users, security templates, process templates, menus and links, and help text.

An EMS Desktop Client administrative setup and configuration for the EMS Web App is done in the EMS Desktop Client. You must have this application installed and administrator credentials to follow the instructions in this section.

This *Configuration Guide* provides information on the following:

- [Administrative Functions in the EMS Web App](#)
- [Configure Everyday Users](#)
 - [Configure Groups and Contacts From an Everyday User](#)
 - [Licensing for Everyday Users](#)
- [Configure Everyday User Templates](#)
 - [Assign Process Templates to Everyday Users](#)
 - [Configure Everyday User Process Templates](#)
 - [Configure Confirmation Behavior for Everyday User Applications](#)
 - [Configure Managed Space](#)
 - [Everyday User Process Template Field Definitions](#)
- [Security Templates](#)
 - [Configure Security Templates](#)
 - [Assign Security Templates to Multiple Everyday Users](#)
 - [Everyday User Security Template Field Definitions](#)
- [Email an Everyday User](#)
- [Configure Web Menus](#)
- [Configure Help Text](#)
- [Configure Language Translations for Everyday User Applications](#)
- [Customize EMS Web App](#)
- [EMS Web App System Parameters](#)
- [Authentication Options](#)
 - [Configure EMS Web App to Use LDAP Authentication](#)

Contact Customer Support

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



Important!

If you do not have a customer login, register [here](#).

CHAPTER 30: Administrative Functions in the EMS Web App

From the Admin Portal in the EMS Web App, Administrators can access error logs, view license information, and enabling help text.

This topic provides information that will allow you to do the following:

- [Admin Functions](#)
 - [Clear your Cache](#)
 - [Enable Help Text Edit](#)
 - [Enable Detailed Errors](#)
 - [Disable Custom JavaScript](#)
- [Error Logs](#)
- [License Information](#)
- [LDAP Configuration](#)

Administrative Functions

This screen allows Administrators to perform the administrative functions listed below:

- **Clear Cache**—Click the Clear Cache button to empty your cache of parameters, tool tip options, and web text. This is an important function that must be performed when parameter changes are made in the EMS Desktop Client.

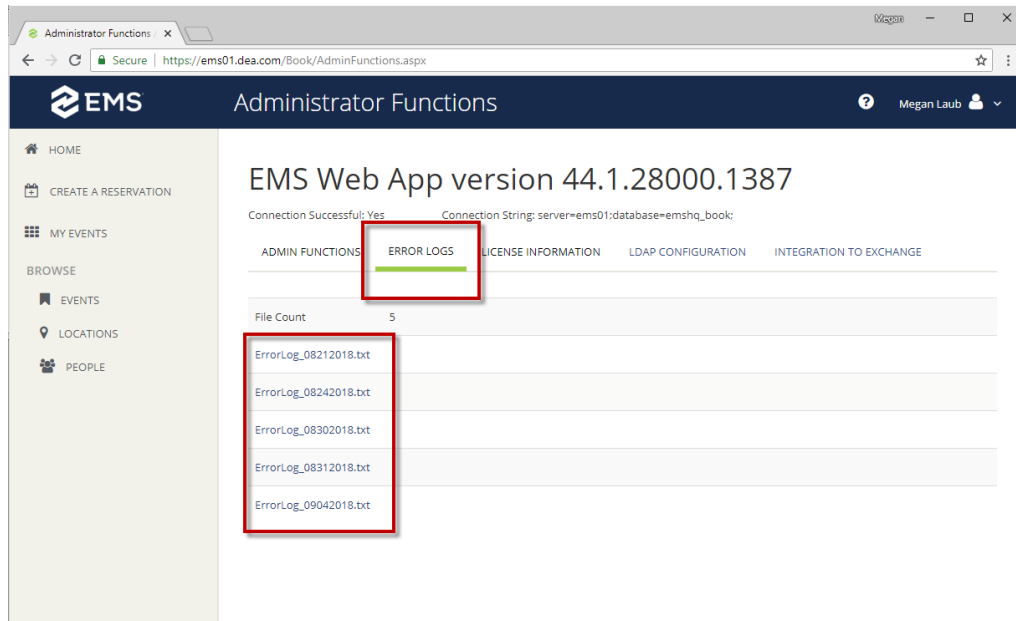
**Note:**

If you have multiple servers that host the EMS Web App, you must **Clear the Cache** on each server.

- **Enable Help Text Edit**—This option allows you to edit help text. To edit help text, click the link next to the help text. See Also: [Configure Help Text](#). To disable help text edit, click the **Disable Help Text Edit** button.
- **Enable Detailed Errors**—This function allows you to view error details when troubleshooting issues. To disable this function, click the **Disable Detailed Errors** button.
- **Disable Custom JavaScript**—Click this button to disable custom JavaScript for the session while troubleshooting. Click the **Enable Custom JavaScript** to enable this function.

Error Logs

1. To view error logs, navigate to the **Error Logs** tab in the Admin Portal.
2. Click on the .txt file of the log you want to view.



Error Logs Tab in the EMS Web App

License Information

1. To view licensing information, navigate to the **License Information** tab in the Admin Portal.
2. Click the **Read License** button.
3. You will receive information on the **Application Version**, what EMS components your organization is **License For**, the **Expiration Date** of your license, the number of **Allowed Web Users** for your license, and the number of **Current Active Users**.

The screenshot shows the EMS Web App Administrator Functions page. The page title is "EMS Web App version 44.1.28000.1387". The navigation menu includes "ADMIN FUNCTIONS", "ERROR LOGS", "LICENSE INFORMATION", "LDAP CONFIGURATION", and "INTEGRATION TO EXCHANGE". The "LICENSE INFORMATION" tab is selected and highlighted with a red box. Below the navigation menu, there is a "Read License" button. The main content area displays the following information:

Application Version	v44.1
Licensed For	Academic Import Utility, API (Updating), Virtual EMS, Kiosk, Advanced Visitor Management, Enterprise Features, Floor Plan Diagrams, Hoteling Features, Attendance Tracker, Credit Card Processing, EMS for Outlook, Integrated Authentication, PAM (Exchange), Advanced CRM, Cisco TMS Interface, Video Display Interface, Kiosk API, API (Read Only), EMS Glance, Polycom Interface, Web Client
Expiration Date:	6/30/2019
Allowed Web Users	9999999
Current Active Users	148

License Information in the EMS Web App

LDAP Configuration

Lightweight Directory Access Protocol (LDAP) is an application protocol for querying directory information. The LDAP Authentication method provides single-sign-on capability using your organization's LDAP environment and can be used in both intranet and internet deployments of EMS Everyday applications, such as the EMS Web App. See Also: [Configure the EMS Web App to Use LDAP Authentication](#).

CHAPTER 31: Configure Everyday Users

This section guides you in configuring one Everyday User at a time. Once you have configured these users, you might need to assign them to security templates and one or more process templates.

- To assign users to Everyday User process templates, see [Assign Templates to an Everyday User](#).
- To assign multiple templates to multiple users in a single step, see [Assign Templates to Multiple Users](#).

**Note:**

You configure EMS Desktop Client user accounts in a different area (under the **System Administration** > **Security** menu). For instructions, see [Configure EMS Desktop Client User Accounts](#).

Additionally, if your organization uses EMS Human Resources Toolkit to manage Everyday User accounts, See Also: [EMS HR Toolkit](#).

Lastly, a set of Account Management parameters control account management behavior. To see these parameters, refer to [EMS Web App System Parameters](#).

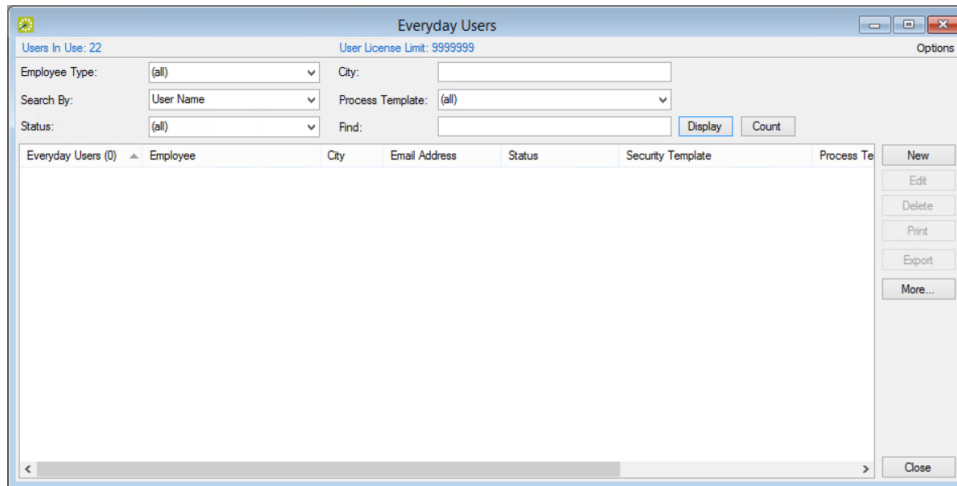
Concept: EMS classifies users into two categories: Guests or Visitors and Everyday Users. "Guests" or "Visitors" (unauthenticated or anonymous users) can browse events, see details about your organization's space, and/or submit requests. These users can register themselves through EMS Web App and create a user account. To enable this, you need to set certain account management parameters (see [EMS Web App System Parameters](#)) and select the Credit\Edit an Account role for the unauthenticated user (see the **Roles** tab definition in [Configuring a security template](#)).

"Guests" or "Visitors" (authenticated users) can also submit and manage reservations if you enable them. You can configure these users through the EMS Desktop Client or the optional Integrated Authentication module. See Also: [Creating a User from a Group](#) and [Creating a User from a Contact](#). Before you configure a user, check that the user has not already been created.

**Note:**

Everyday User process templates control access and behavior in EMS Software's Everyday User Applications. If you are upgrading from an older release of EMS, you might recognize Everyday Users as "Web Users" and "Everyday User Process Templates" as "Web Process Templates."

1. On the EMS Desktop Client menu bar, click **Configuration** > **Everyday User Applications** > **Everyday Users**. The Everyday Users window opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.



2. Check that the user you want to configure does not already exist. Enter the user name or email address in the **Find** field.

**Note:**

This search string is not case-sensitive, but your entries must be in the correct order. For example, if searching by Email Address, a search string of bob returns *bobworth@emssoftware.com* but not *dbobbett@emssoftware.com*.

You can narrow your search results by:

- **Group Type**
- **City**
- **Status**
- **Process Template**

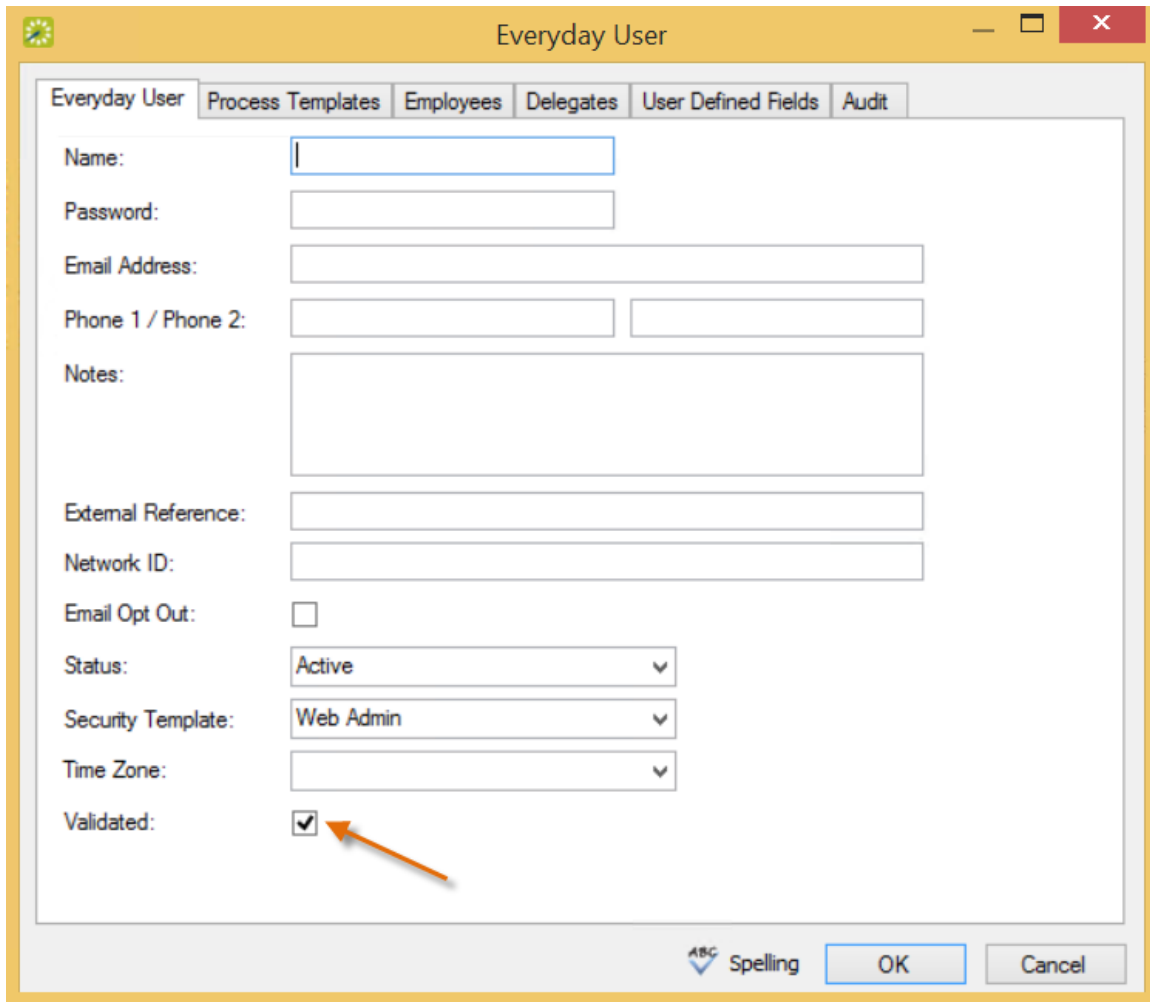
Then **Click Display**; search results show in the lower pane of the window. If your user does not already exist in EMS, proceed to the next step.

**Note:**

If the EMS system parameter **Users linked to Groups via External Reference** is set to **Yes**, then you will also see a Group column and a City column.

- 3. Create a new user. Click the **New** button. A dialog box opens.

Note:
If the user has confirmed membership (by responding to an email containing an activation link), the **Validated** checkbox highlighted below will be selected. If the user had to answer questions when requesting an account, you can view the user's responses on the **User Defined Fields** tab.



Everyday User Dialog

**Note:**

When you configure a user, you can also specify one or more delegates for the user. A delegate is a user who can create and view reservations on behalf of another user.

4. Enter information for the new user. User name and email address are required; password is only required if not using the optional Integrated Authentication module. All other information is optional and can be added later as needed.

Everyday User Tab Field Descriptions

Field	Description
Name	The name of the user. (Maximum of 30 characters, including spaces).
Password	The password that the user must enter to log in to EMS Web App. If using the optional Integrated Authentication module, Password can be left blank since the network password is used instead.
Email Address	Enter the full email address for the user as the user must enter this address to log in to EMS Web App.
Phone 1 /Phone 2	Optional fields.
Notes	Optional field. Read-only.
External Reference	Optional field. Links the user to an outside program such as EMS Human Resources Toolkit if needed.
Network ID	The user's network ID.
Email Opt Out	Optional field. Select this option if you do not want the user to receive automatic emails (such as reservation summary emails) from EMS Web App. The user can still receive manually sent emails.
Status	Required field. Select the status for the user: <ul style="list-style-type: none"> • Active—The user can log in to EMS Web App, EMS Mobile App, and EMS for Outlook. • Pending—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is informed that he/she must check back at a later time. • Inactive—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is instructed to contact the EMS administrator.
Security Template	Required field. This determines the user's access to the system (i.e., the menu items the user can see and the event information that the user can view).
Time Zone	Optional field. The time zone in which the user is located. Beginning in version 44.1, it is strongly recommended that users are assigned to a time zone for an optimal experience on all Everyday User Applications.

Field	Description
Validated	When checked, users who created their own accounts have confirmed membership (by responding to an email containing an activation link). When unchecked, the user will not be able to use EMS Web App.

- Assign process templates to the new user. Open the **Process Templates** tab. The process templates you assign here will appear as menu items to the user in EMS Web App, EMS Mobile App, and EMS for Outlook.
- Specify Groups on whose behalf the user can create and manage reservations. Open the **Groups** tab. To filter the list of active groups displayed, use the **Find** and **Type** fields and then click **Display**. Select one or more Groups (use CTRL-click for multiple groups), and then click **Move (>)** to move the selected groups to the **Selected** list.
- Specify Delegates the user can impersonate. Open the **Delegates** tab; to see all available users, click **Display**. To narrow the search results, use the **Search** by dropdown list to search by User Name or Email Address. Select one or more delegates (using CTRL-click for multiple delegates), and then click **Move (>)** to move the selected users to the **Selected** list.

**Note:**

Click **Spelling** to spell-check any information that you manually entered for the user.

- Click **OK**. The dialog box closes and returns you to the users window with the newly configured user automatically selected.

CHAPTER 32: Configure Groups and Contacts from an Everyday User

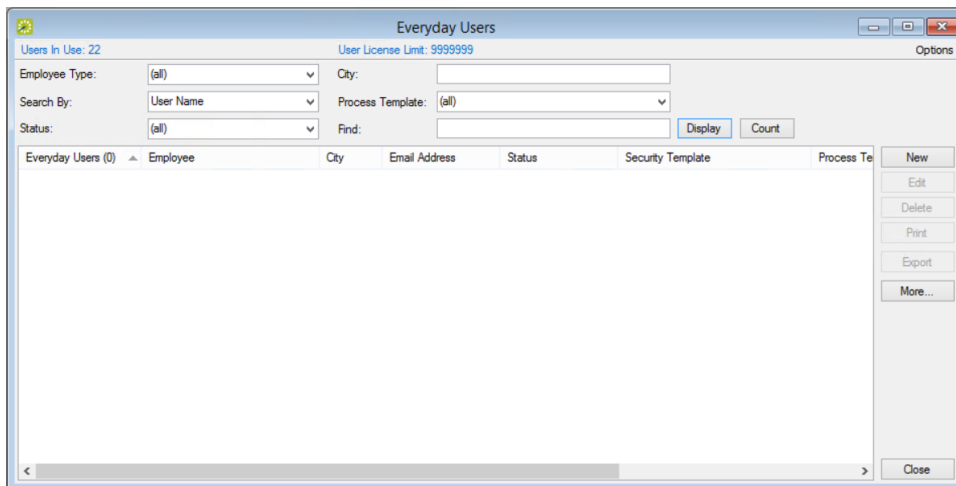
This topic provides information on the following:

- [Create Groups and Contacts from the Everyday User](#)
 - [Configure a Group from a User](#)
 - [Configure a Contact from a User](#)

Create Groups and Contacts from the Everyday User

After you have configured a new user, you can create groups and contacts from the user.

1. On the EMS menu bar, click **Configuration > Everyday User Applications > Everyday Users**. The Everyday Users window opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.



Everyday Users Window

2. Locate the user you want to work with. Specify any combination of search criteria, and then click **Display** to see all users that meet the criteria.



Note:

If you leave the **Find** field blank, a list of all currently active users appears. This field is not case-sensitive, but entries must be in the correct order. For example, a search string of Bar returns Barry Jones, but not Amanda Barry.

3. Continue to one of the following:
 - [Configure a Group from a User](#)
 - [Configure a Contact from a User](#)

Configure a Group from a User

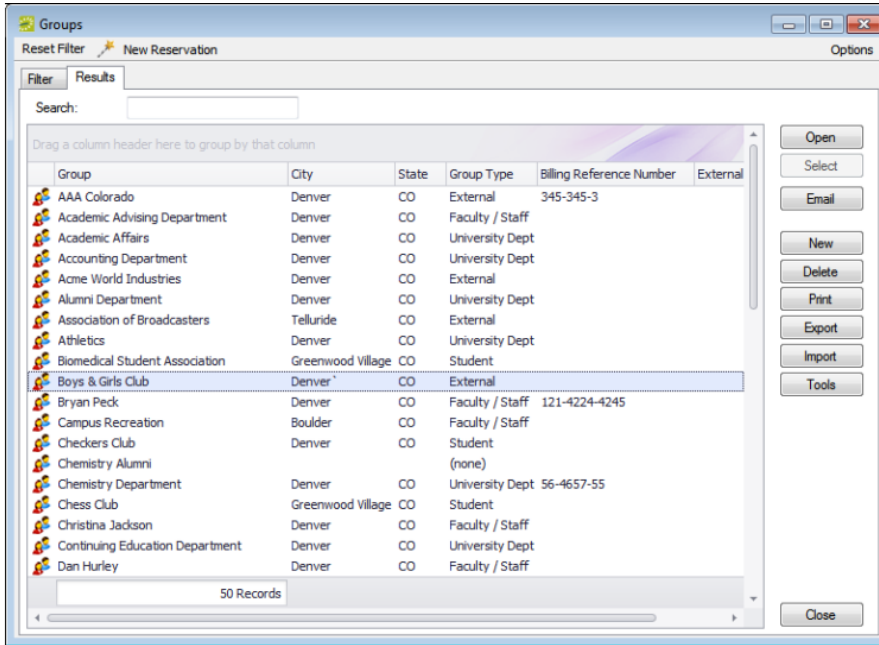
1. Select the user from which you are creating a Group, and then click **More > Create Group**. The Group dialog box opens. The **Name** field is automatically populated with the name of the selected user, but you can edit this value if needed.

Group Tab

2. Configure the new Group as needed. See [Configuring Groups](#).

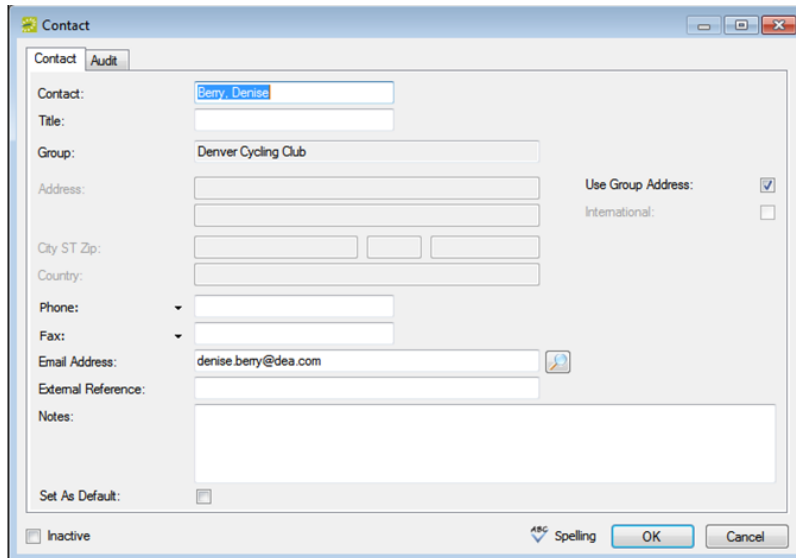
Configure a Contact from a User

1. Select the user from which you are creating a contact, and then click **More > Create Contact**. The Groups window opens.



Groups Window, Results Tab

2. Search for the Group for which you are creating the Contact. See Also: [Searching for a group and/or contact.](#)
3. Select the Group on the **Results** tab, and then click **Select**. The Contact dialog box opens.



Contact Dialog Box




4. Enter the information for the new contact.




Note:

You can click **Spelling** to spell-check before saving.

Contact Tab Field Descriptions

Field	Description
Contact	<p>By default, the Contact field is populated with the name of the user that you selected, but you can edit this value if needed.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  Note: The name can be a maximum of 50 characters, including spaces. </div>
Title	The job title of the Contact.
Group	Populated with the name of the Group that you selected. You cannot change this value.
Address	Populated with the address of the Group that you selected. If the Contact address is not the same as the Group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone and Fax	<p>The phone number and fax number for the group.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  Note: The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label. </div>
Email Address	<p>The email address for the contact.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address. </div>
External Reference	Links the contact to an outside program or another EMS record if needed.

Field	Description
Notes	Any other information that is pertinent for the contact. This information only displays within the EMS Desktop Client.
Set as Default	<p>Select this option if the contact is to be the default Contact for the selected Group.</p> <div style="border: 1px dashed gray; padding: 10px; margin: 10px 0;">  Note: If a default Contact has been defined for a Group, then when you specify the Group information for a reservation, the Contact field is automatically populated with the name of the default Contact. </div> <p>You can always specify a Contact as the default contact for a selected Group at a later date. To do so, select the Contact in the right pane of the Group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.</p>
Inactive	Leave this option blank to add the Contact as an active Contact. Select this option to de-activate the Contact.

- Click **OK**. The Contact dialog box closes and the Contact is created from the user and added to the Group. The Group-specific window opens with the Contact selected.

CHAPTER 33: Licensing for Everyday Users

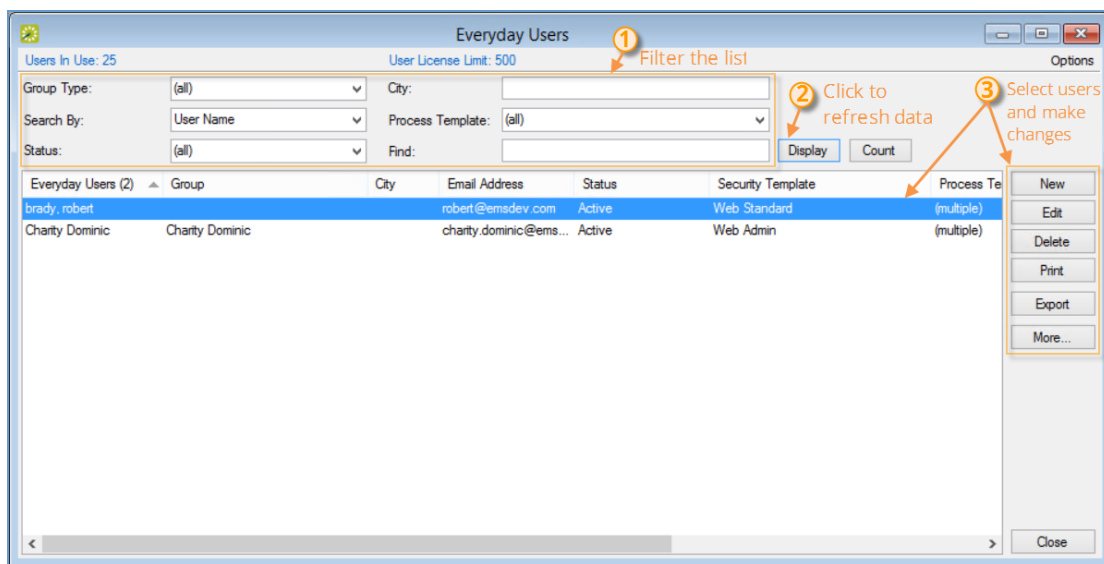
If your organization has reached your limit of licensed everyday users, you will no longer be able to create additional users. To get back under your maximum number of users, you can either deactivate or delete users from EMS Desktop Client.



Note:

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

1. Select the **Configuration > Everyday User Applications > Everyday Users** menu.
2. To delete users, select them and click the **Delete** button.
3. To deactivate users, select them, click the **Edit** button and set the Status field to **Inactive**.



Everyday Users Menu



Note:

If you use HR Toolkit, users that are no longer part of the feed or part of your organization will automatically be deactivated.

A License Notification message will display when opening the Desktop Client if the user license has been exceeded.

CHAPTER 34: Configure Everyday User Templates

This topic explains the process of assigning your users to security profiles and booking templates.

**Note:**

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

Concepts: Everyday User, Everyday User Template, Security Template, and Process Template Explained. *Click for more...*

- **Everyday User**—Someone who can request or reserve space and services in any EMS Software application other than EMS Desktop Client. You assign these users to templates.
- **Everyday User Template**—Defines and controls what a user can do. EMS uses two types of everyday user templates:
- **Security template**—This is essentially a security profile: it controls which menu items are available to the users assigned to the template, which booking information fields display to them, and other information.
- **Process template**—This is essentially a booking template: it controls what users can do for different types of reservations (conference room, workspace, study room, and so on). This type of template also controls users' date/time restrictions, room security (reserve, request only, no access), and service availability (A/V, catering, and so on).

To configure Everyday User templates, you will need to do the following:

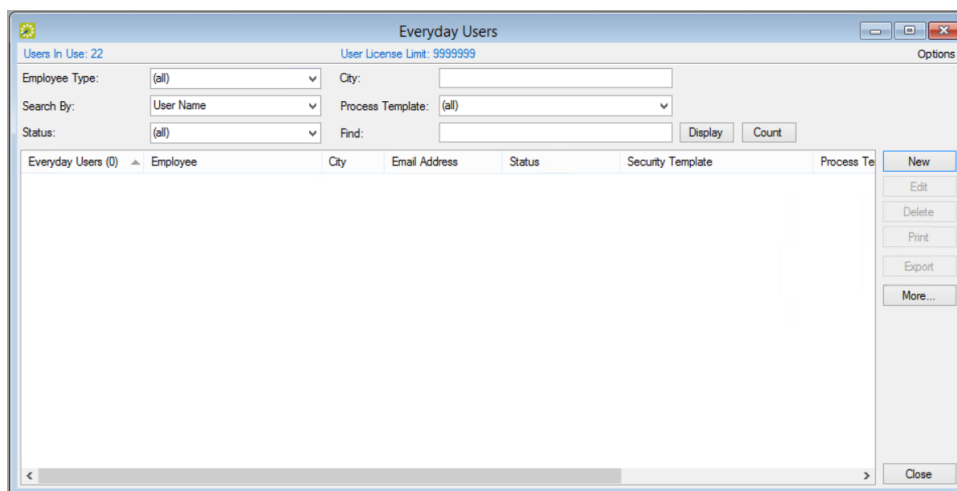
- [Configure Everyday Users](#)
- [Configure Everyday User Process Templates](#)

CHAPTER 35: Assign Process Templates to an Everyday User

**Note:**

This section guides you in assigning Everyday User process templates to a single user. To assign these templates to multiple Everyday users in a single step, see [Assign Web Templates to Multiple Everyday Users](#).

1. On the EMS menu bar, click **Configuration > Everyday Applications > Everyday Users**. The Everyday Users window opens.



2. In the **Find** field (in the upper portion of the screen), search for the user to whom you want to assign Everyday User process templates by entering at least the first three characters of their user name or email.

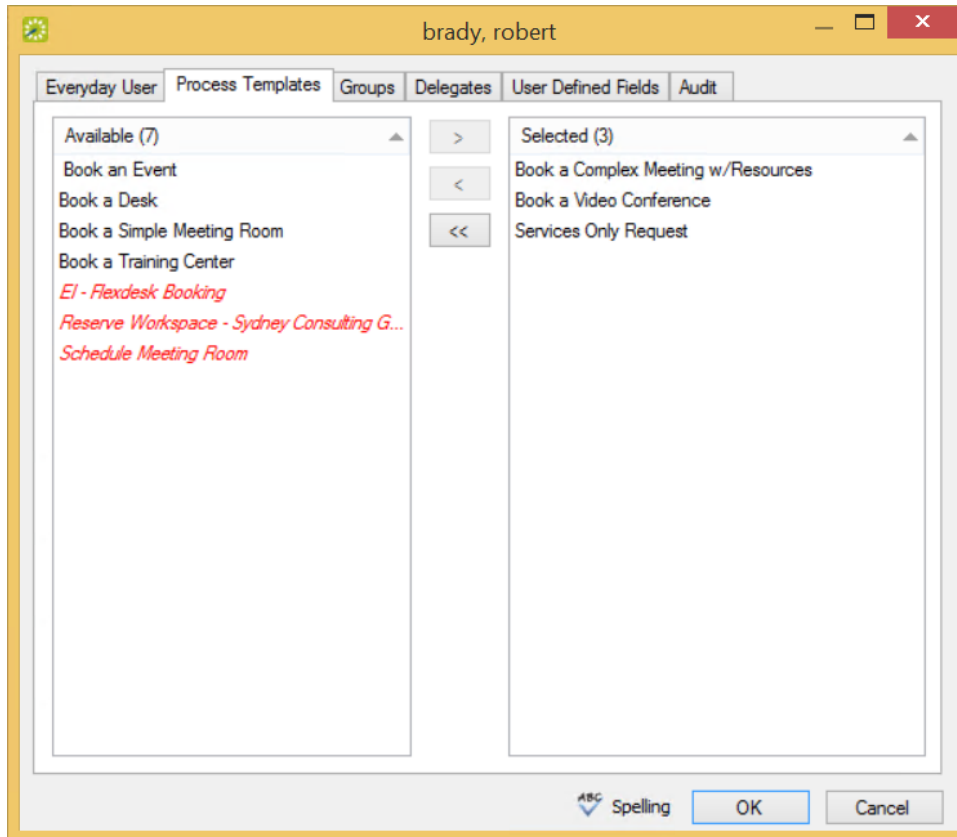
**Note:**

You can further narrow your search results by:

- **Group Type**
- **City**
- **Status**
- **Process Template**

3. Click **Display**.
4. Select the user and click the **Edit** button on the right.

5. In the Everyday User editing window, click the **Process Templates** tab.



Process Templates Tab

6. To assign process templates to an Everyday User, move them to the right side using the arrow button. Your selections here will present to the user in EMS Web App as available booking options under "My Templates."
7. Click **OK**. The Everyday Users dialog box closes and returns you to the Everyday Users window.

CHAPTER 36: Configure Everyday User Process Templates

Concept: "Web Process Templates" Are Now Called "Everyday User Process Templates"
If you have previously used older versions of EMS, you might know booking templates as "Web Process Templates." These templates are now called "Everyday User Process Templates." These templates define user access and booking behavior in EMS Web App, EMS Mobile App, and EMS for Outlook. Similarly, you might know permissions templates, which control what an Everyday User is able to do, as "Web Security Templates." These are now called "Everyday User Security Templates."

See Also: [Configure Security Templates.](#)

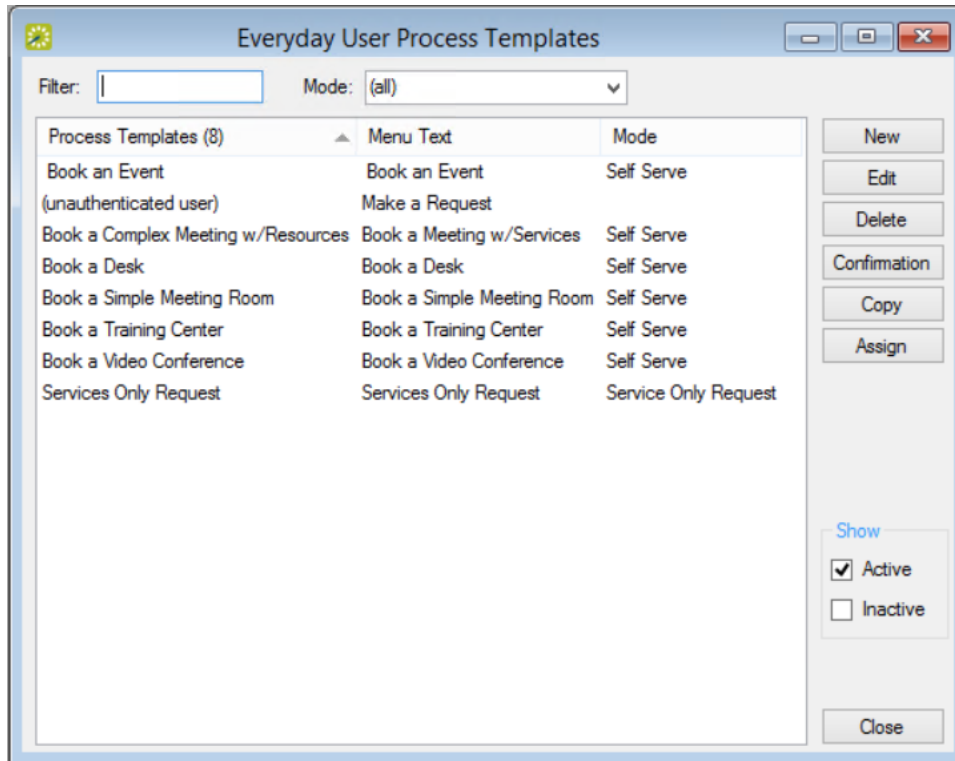


Note:

In EMS Enterprise, the guest (unauthenticated user) everyday user process template is always available and you can have an unlimited number of other everyday user process templates. In EMS Professional, the (unauthenticated user) everyday user process template is always available, but you can have only two additional everyday user process templates.

To configure Everyday User process templates, complete the following steps:

1. On the EMS menu bar, click **Configuration > Everyday Applications > Everyday User Process Templates**. The Everyday User Process Templates window opens on the **Everyday User Template** tab.



Everyday User Process Templates Window

This window lists the process templates that have been defined for your EMS Web App implementation. The pre-defined user called "unauthenticated user" is included in all EMS implementations; you use this template to manage settings for anonymous or "guest" users. For a user to be able to view and use this template, you must assign the user to the template. See Also: [Configure Everyday Users](#).

**Note:**

To view all everyday user process templates in your EMS database, regardless of status, under Show, click **Inactive**.

2. Click **New**. The Book a Meeting Room configuration dialog box displays. Enter the information for the new everyday user process template as needed. See [Everyday User Process Template Field Definitions](#) for more information on the tabs in the Book a Meeting Room configuration dialog.

Book a Meeting Room Configuration Dialog

Important! The cache must be cleared in the EMS Web App whenever parameter changes are made in the EMS Desktop Client.

Note: The **Request Status** field is used to configure booking templates for the "Request/Approval" booking model, in which everyday users request space and administrative users approve those requests (using the Dashboard menu icon). For example, if you set this field to **Request**, then the booking will not be finalized until an administrator has approved it. If you are configuring a template for booking desks and workspaces or "hoteling," see [Create Templates for Desks and Workspaces](#).

Note: You can use the Request/Approval Model to Oversee "Managed Space." For more information, see [Configure Managed Space](#).

**Note:**

In the Everyday User Application Settings section:

- **Enable for Web App** means enable the template on EMS Web App.
- **Enable for Mobile** means enable the template for the EMS Mobile App.
- **Enable for Outlook** means enable the template for the EMS for Outlook add-in, which can override booking rules such that users can book a room that is in conflict. For this situation, you can also configure a system-generated email to be sent to the user if any rooms are not available for dates booked. An additional tab becomes available if you create a template with the option enabled, Outlook Conflict Email.
- **Enable Integration to Microsoft Exchange** means enable the template for Microsoft[®] Exchange when your organization does not use EMS for Outlook. See Also: [Everyday User Process Template Field Definitions](#).

You can continue configuring the booking template on additional tabs or just click **OK** to save your changes.

Save Your Template Settings

When you have completed entries in all tabs as desired, click **OK**. Your changes to the everyday user templates are saved.

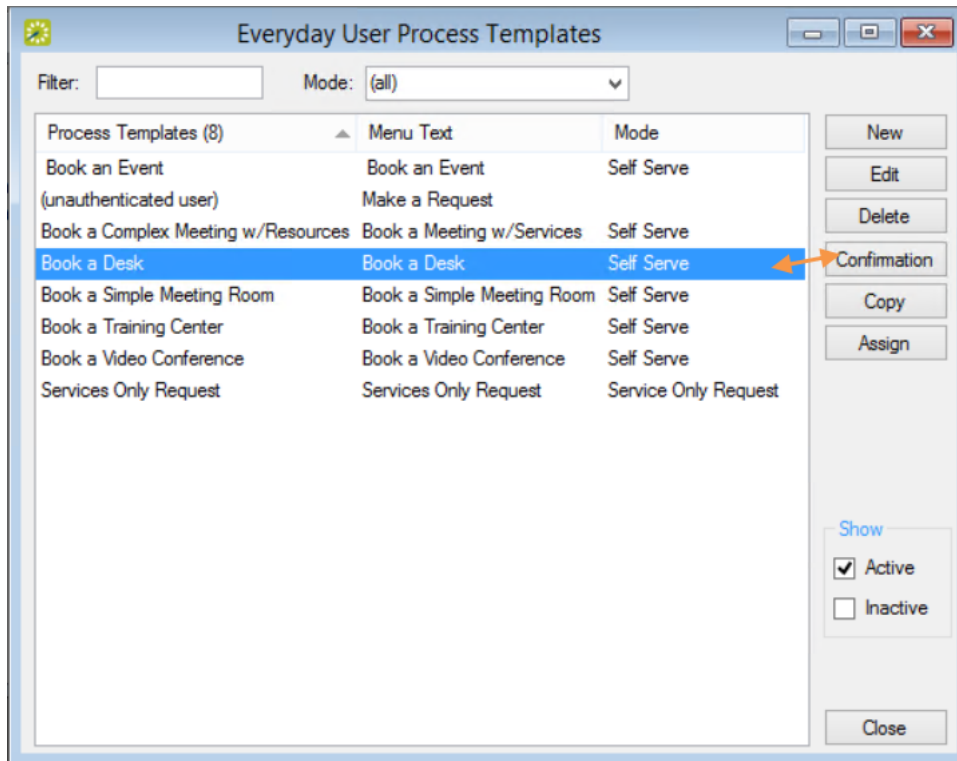
**Note:**

Make sure that you have defined your everyday users so you can assign them to your everyday templates. See Also: [Configure Everyday Users](#)

CHAPTER 37: Configure Confirmation Behavior for Everyday User Applications

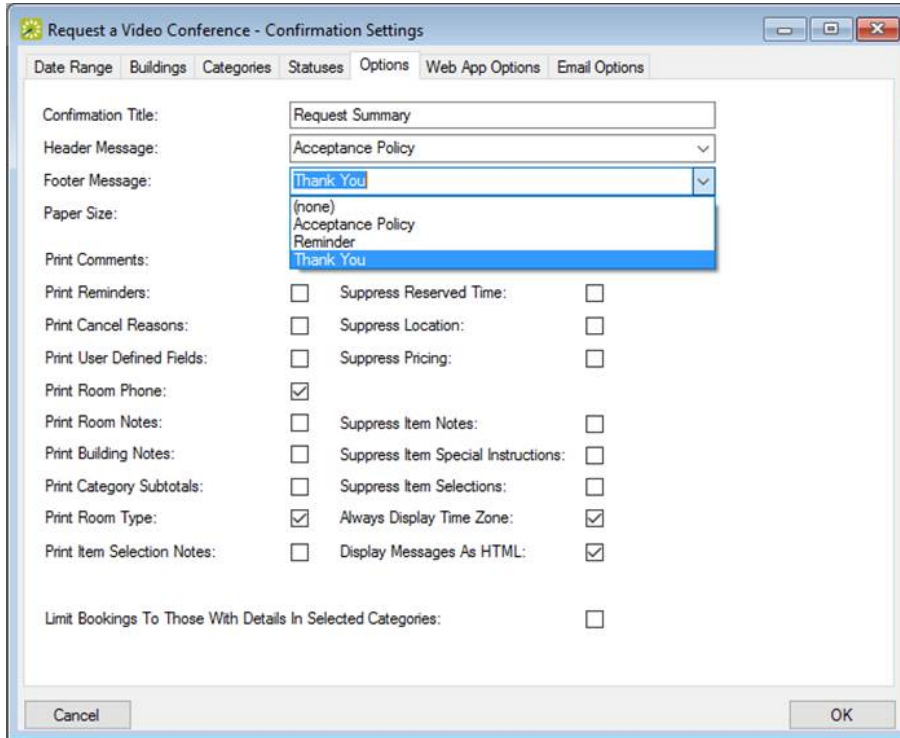
When [working with Everyday User Process Templates](#), you can set automated confirmations that generate when Everyday Users initiate reservations or bookings with specific templates. For example, you might want Everyday Users to always receive an email to confirm that a request for a room has been received and will be processed.

1. To customize the behavior of this type of confirmation, from the Everyday User Process Templates window, select the template for which you want to customize a confirmation.
2. Click **Confirmation**.



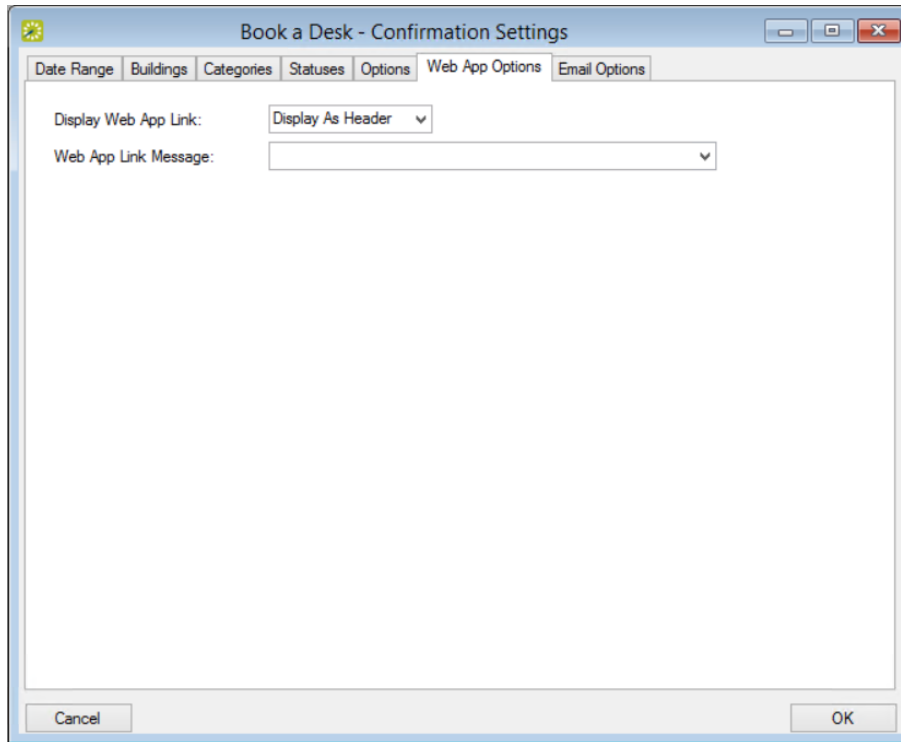
Everyday User Process Templates Window

3. The Confirmation Settings window appears for this template. Click through the tabs specifying your Confirmation Settings.
 - Use the **Options** tab to set an email header and email footer for pre-configured messages (which you set under **Configuration > Other > Messages**).



Setting Email Header and Footer in the Options Tab


- Use the **Web App Options** tab to specify if and where a URL to the Web App should be included in the confirmation. You can also include a Message to include with the URL in the confirmation. See Also: [Configure the Confirmation Email Subject Line](#).



Specifying EMS Web App Link Settings in the Web App Options Tab

EMS Web App Link Settings Fields

Option	Description
Display Web App Link	Indicate whether a URL to the Web App will display in the confirmation as a Header, Footer, or at all.
Web App Link Message	Indicate which Message, if any, to include with the URL to the EMS Web App in the confirmation.

 **Note:** To understand how the Desktop Client user encounters these confirmations, see [Confirmations](#).

CHAPTER 38: Configure Managed Space

Once you have [configured facilities](#) (rooms, categories, services, resources, and so on), you can configure special process templates for "managed space," which is meeting space that might require additional oversight and an approval process to finalize a reservation. For example, you can configure a large banquet hall as managed space to ensure that any request to use it is approved by a supervisor. That supervisor would use the Dashboard from the EMS Desktop Client menu bar to view requests for space.



Typically, managed space involves services, expenses, and invoicing that affect multiple stakeholders and departments, and templates designed for this model are typically assigned to Everyday Users of EMS Web App. By contrast, such templates are **not** recommended for assignment to EMS for Outlook users since Microsoft® Outlook does not show the request status of such a reservation.

To configure a process template to require supervisory approval:

- When defining an Everyday User Process template for a specialized type of space or room, you set the **Request Status** field to Request (so it will show as pending in the Dashboard).
- Assign that template to the appropriate everyday users (typically, EMS Web App users so they can only Request reservations for that specialized space.
- Designate users in EMS Desktop Client who will [review and approve this type of space request in the Dashboard](#).


CHAPTER 39: Everyday User Process Template Field Definitions



This topic provides information on the following:

- [Process Template Tab](#)
- [Additional Tabs for Booking Template Configuration](#)
 - [Booking Rules Tab](#)
 - [Booking Rules Tab: Booking Requirements Area](#)
 - [Booking Rules Tab: Booking Days Area](#)
- [Defaults Tab](#)
- [Video Conference Tab](#)
- [Rooms Tab](#)
- [Categories Tab](#)
- [Event Types Tab](#)
- [LDAP Groups Tab](#)
- [User Defined Fields Tab](#)
- [Parameters Tab](#)
- [Help Text Tab](#)
 - [Menu Text Translations Tab](#)
 - [Terms and Conditions Tab](#)

Process Template Tab

Field	Description
Description	Read-only information.
Mode	<p>Determines how a user can make a reservation in EMS Web App.</p> <p>Request—users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not allow the user to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS Desktop Client user. The room does not show as Reserved until this step has occurred.</p> <div style="border: 1px dashed gray; padding: 10px; margin: 10px 0;"> <p>Note: The "Request" mode is only for guest users. If you are upgrading to EMS V44 from an older version, any roles that were defined in Request mode will be set to inactive.</p> </div> <p>Self Serve—Registered users can see real-time room availability (in list or grid views).</p>

Field	Description
	<div style="border: 1px dashed gray; padding: 10px; margin-bottom: 10px;">  <p>Note: If users require video conferencing, you must choose this option.</p> </div> <p>Service Only Request—Allows users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS.</p>
Menu Text	The menu text or link that a EMS Web App user sees when requesting a room using this everyday user process template.
Available to New Users	Select this option if this everyday user process template is to be automatically assigned to newly registered users.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reservable' on the Rooms tab.
Request Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'requestable' on the Rooms tab.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by users attached to this template that result in a conflict (the room is already booked).
Cancel Status	Available only for Self Serve mode. The default status that is applied to bookings that are canceled by users who are attached to this template.
Rule Violation Status	Enabled only if Outlook is selected. Used in conjunction with the EMS for Outlook module. If you carry out an action in the EMS for Outlook module that violates a booking restriction, then the booking is changed to this status.
Default Setup Type	The setup type that is selected by default for a room search when a user who is attached to this template is reserving a room in EMS Web App. The user can always select a different value.
Allow user Personalization	Select this option if users must be able to use the Options feature to customize their settings on EMS Web App pages.
Menu Sequence	Enter a number that indicates the order in which this menu option is relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence

Field	Description
	<p>number appearing first.</p> <div style="border: 1px dashed gray; padding: 10px; margin-top: 10px;">  <p>Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.</p> </div>
Video Conference	<p>Select this option if the users who are attached to this template must be able to request rooms that have a video conferencing feature.</p> <div style="border: 1px dashed gray; padding: 10px; margin-top: 10px;">  <p>Note: This option is available only for EMS Enterprise. It is not available for EMS Professional. To use the Video Conference option correctly with a everyday user process template, the Self Serve Mode must be selected for the template.</p> </div>
Enable for Web App	Select this option if this process template should be available on EMS Web App.
Enable for Mobile	Select this option if this everyday user process template is to be available (in an appropriate format) on a mobile device browser.
Enable for Outlook	Enables the everyday user process template for use with the EMS for Outlook module.
Enable Integration to Microsoft Exchange	Enables the integration of templates with your organization's Exchange server (typically, when your organization does not use EMS for Outlook. Enabled only if your organization has purchased the optional Integration to Microsoft Exchange module. Select this option if users who are attached to this template must be able to see the free/busy schedules of the attendees. The user can choose a date and time that is convenient for all attendees and then send invitations through EMS Web App, which attendees receive and can manage through Outlook.

Additional Tabs for Booking Template Configuration

This section provides a conceptual overview of the additional tabs on the [Booking Template Configuration page](#).

Booking Rules Tab

You can use the Booking Rules tab to control very specific timing on how users can book, cancel, or end events.

The Booking Rules tab contains two areas:

- [Booking Requirements Area](#)
- [Booking Days Area](#)

Booking Rules Tab

Booking Rules Tab: Booking Requirements Area

Field	Description
Max. No. Bookings Allowed Per Reservation	Maximum number of bookings that a new reservation can contain.
Max. No. Minutes Allowed	Maximum number of minutes for which a new reservation can be created (not enforced when a user edits a booking).
Use Cancellation Cutoff Time	Whether the booking has a cutoff when cancellations can no longer be made. Cutoff Time and Number of Days control how far in advance the cutoff is set. For example, if you enter 3 p.m. and one day, then cancellation must take place before 3 p.m. on the day before the event.
Cancellation Cutoff Hours	The number of hours before an event when cancellations can be made. For example, if you enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day. If using this setting, clear the Use Cancellation Cutoff Time field.
Cancel Booking in Progress	Allows users to cancel events in progress. If selected, the Cancel Booking in Progress Status option is enabled. Use this field to specify a status to display on this type of cancellation (configured separately). See Configure Statuses .
Cancel Booking in Progress Status	Sets the status for bookings that are canceled when in progress.
End Booking in Progress	Allows users to end in-progress bookings early, which makes the space available to other users.

Booking Rules Tab: Booking Days Area

You can use the Booking Days area to indicate how far into the future bookings can be made and how much lead time is required to make a booking.

Fields change depending on your initial **selections in Range of Days** and **Specific Date**. The second dropdown menu sets the lead time requirement and you must select a date in the **Only Allow New Bookings After This Date** field.

Field	Description
Specific Date	If you select Specific Date , then you must specify a value for Only Allow New Bookings Prior to This Date to dictate the future range.
	Only allow new bookings within Range of this Many Days —Set a date in this field if you want bookings to only be allowed after this date.
	Use New Booking Cutoff Time —Enter the cutoff time and number of days at which point you want to require the Everyday User to submit bookings by that time and number of days.
Range of Days	New Booking Cutoff Hours —Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.
	Selecting this option from the first dropdown means the user will only be allowed to make bookings within a range of days. You must also specify a value for Only Allow New Bookings within Range of This Many Days , and you must also indicate a cutoff time or cutoff hours as you did for cancellations
	Only allow new bookings within Range of this Many Days – Set a number in this field to allow bookings within the number of the days specified (e.g.: 365 would allow an everyday user to create bookings within 365 days).
	Max No. Bookings Per Day —Number of bookings allowed within 24-hour period.
	Max No. Bookings Per Date Range —Number of bookings allowed within Range of Days.
	New Booking Cutoff Hours —Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.

Defaults Tab

You can use this tab to set the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone to automatically populate the Room Requests page when users make reservations; users can edit them as needed.

Event Type and Building values are pre-configured.

See Also: [Configure Event Types](#), [Configure Buildings](#), and [Set Default Start and End Times](#).

Video Conference Tab

You can use this tab to control how users can make video conferencing reservations. This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the everyday template tab.

For information on how to configure the information on this tab correctly so that assigned users make video conferencing reservations, see [Video Conferencing](#).

Rooms Tab

This tab enables you to associate the everyday template with specific space. To begin, specify Building (all buildings, a specific building, an area, or a view) and Room Type search criteria. These are pre-configured.

See Also:

- [Configuring Buildings](#)
- [Configuring Areas](#)
- [Configuring Public Views](#)
- [Configuring Rooms](#) and [Configuring Room Types](#)

You can move one or more rooms (CTRL-click) from the Available list to the Request or Reserve panes for this template. This controls the space that users assigned to this everyday template can book.

- Reserve pane: rooms that can be reserved without approval (booked in the Reserve Status on the everyday template tab).
- Request pane: rooms that require approval (booked in the Request Status on the everyday template tab).

Categories Tab

This tab enables you to set the pre-configured categories of services that users assigned to the template can add to their bookings by moving them from the Available list to the Selected list. These are pre-configured. See [Configuring Categories](#).



Note:

If your Administrator has configured an "Attendee" type category, and assigned it to the booking template, users can invite or remove attendees on the Services page.

Event Types Tab

This tab enables you to set which event types users of this template can choose from during the booking process by moving them from the Available list to the Selected list, or to the Available To All everyday process Templates list.

LDAP Groups Tab

You use this tab to assign Everyday User process templates to users based on LDAP Groups that are defined in your directory service, for example, Active Directory. Everyday user process templates that are

assigned via LDAP do not need to be explicitly assigned to user records. When users log in, they “inherit” the everyday user process templates based on the LDAP groups to which they belong. To assign the one or more LDAP group, select and move them from the Available list to the Selected list. See Also: [LDAP Authentication](#).

User Defined Fields Tab

You can use this tab to control the behavior of your implementation's customized fields for this template by moving one or more from the Available pane to the Required or Optional panes. These fields are pre-configured. See Also: [Configuring User Defined Fields \(UDFs\)](#).

Parameters Tab

This tab enables you to control how this everyday user process template is affected by parameter settings.

- To edit the value for a parameter, select the parameter, and then click **Edit**.
- To reset the value for a parameter to its default global value, select the parameter, and then click **Use Global**.



Note:

The billing parameter, Billing Reference Validation, includes a special option that affects whether users are prompted to enter billing and PO information and whether they are validated.

Users will see the Billing Reference field during the booking process parameters are set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the

Admin decides whether to display the field, user entries will be validated based on the value in the "Billing Reference Validation" parameter set (above) on the template.

Billing Reference field options:

- Show (Prompt)
- Require
- Validate (Show and Require)
- Don't Show

Additionally, the Billing Reference Validation parameter will always determine whether it is optional, required, or required and validated.

See Also:

- [Configuring Rooms](#)
- [Configuring Categories](#)
- [Configuring Field Behavior for Billing Reference and PO Numbers](#)

Help Text Tab

This tab enables you to control the help text that displays to users when they are using this template. By default, help text items inherit their settings from the global Help Text list. (See [Configuring Help Text](#).) You can use the list of help text items on the Help Text tab to override the settings for this particular template if needed.

- To edit the value for a help text item, select the item, and then click **Edit**.
- To reset the value for an item to its default global value, select the item, and then click Use **Global**.

Menu Text Translations Tab

This tab enables you to control how your EMS Web App translations appear to users of this template. You only need to provide information on this tab if a foreign language translation has been defined for everyday templates. See [Configuring Language Translations](#). For each translation shown here, you can click in the **Text** field and enter the appropriate translation for the menu text (the menu text or link that an EMS Web App user sees when requesting a room using this everyday user process template).

Terms and Conditions Tab

You can use this tab to set your template to require that its users agree to special Terms and Conditions before submitting reservations. In the text area, you can create a Terms and Conditions message that presents when a user selects a room.

- Design (selected by default) means you use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on).
- HTML means you use HTML code to format the message (spacing, number of lines, capitalization, and so on) to format your Terms and Conditions.

CHAPTER 40: Security Templates

A security template specifies which menu items are available to the users who are assigned to the template, which fields can be viewed in event tooltips, and other information.

In this section:

- [Configure Security Templates](#)
- [Assign Security Templates to Multiple Everyday Users](#)
- [Everyday User Security Template Field Definitions](#)

CHAPTER 41: Configure Everyday User Security Templates

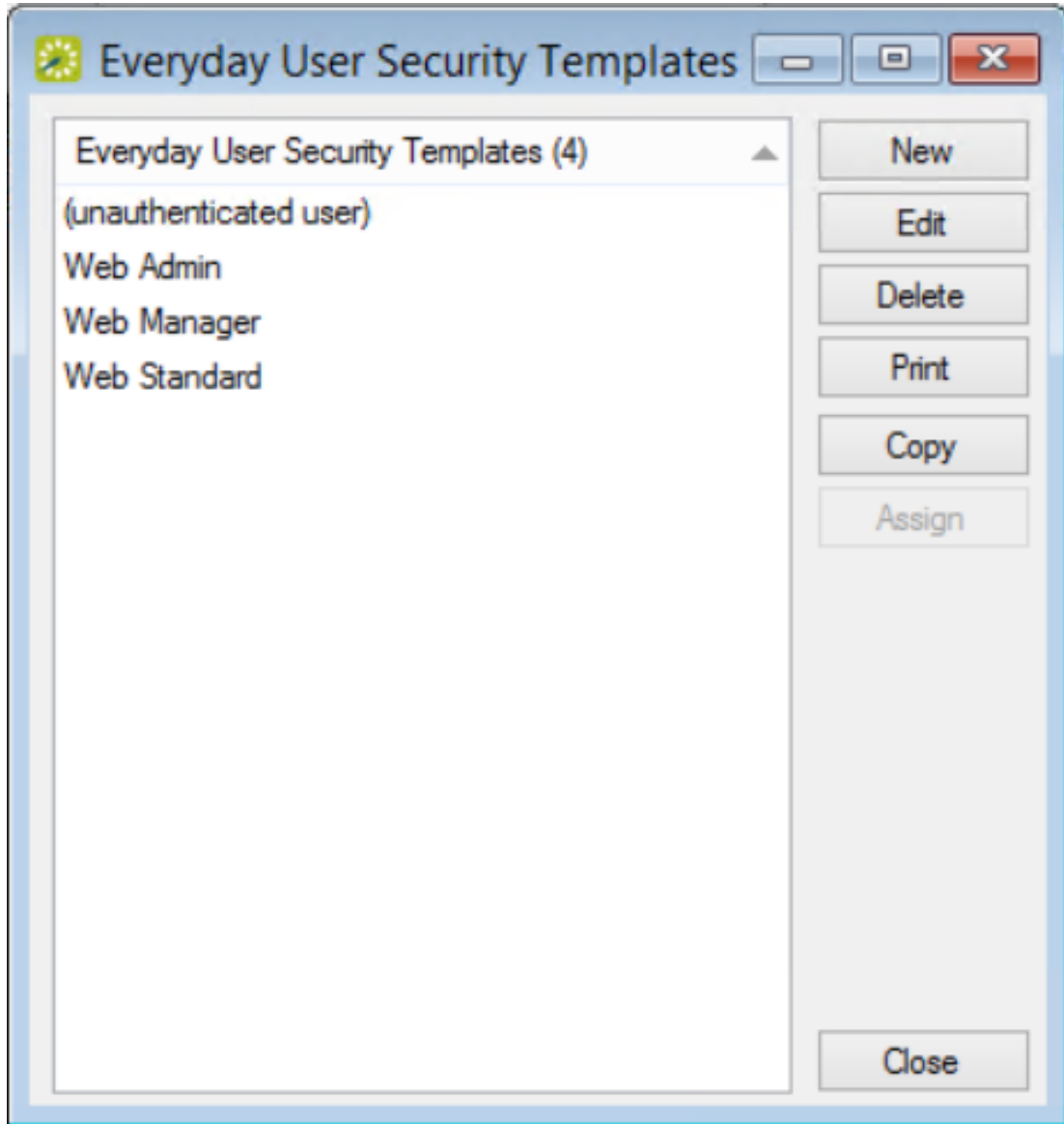
A security template specifies which menu items are available to the users who are assigned to the template, which event information fields can be viewed, and other information.

This topic will provide information on the following steps:

- [Enter Security Template Settings](#)
- [Assign Roles to Users](#)
- [Set Tooltip Display](#)
- [Finalize the Template](#)

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

The Everyday User Security Templates window opens. This window lists the one user role (unauthenticated user) used in the EMS Web App and EMS Mobile App, as well as any other security templates that have been defined.



Everyday User Security Templates Window



Note:

The "(unauthenticated user)" role controls what happens when users do not have a log in access an EMS Everyday User application such as EMS Web App and EMS Mobile App.

**Note:**

The remainder of this procedure describes how to configure a security template “from scratch.” You can also configure a security template by copying an existing rule. Select the security template that you want to Copy then skip to Step 3. To assign an existing security template to multiple users, See Also: [Assigning a Security Template to Multiple Users](#).

2. Click **New**.


The Security Template dialog box opens on the **Security Template** tab.

The screenshot shows a Windows-style dialog box titled "Security Template". It has a yellow title bar with standard window controls. Below the title bar are four tabs: "Security Template", "Roles", "Booking Details", and "Display Fields". The "Security Template" tab is selected. The main area contains a "Description:" label followed by a text input field. Below this are three checkboxes: "Allow User To Add Groups:" (checked), "Allow User To Add Contacts:" (unchecked), and "Allow User To Set Default Contact:" (unchecked). At the bottom right are "OK" and "Cancel" buttons.

Security Template Tab

Enter Security Template Settings

- Enter the information for the new everyday user role.

Option	Description
Description	<p>The description or name for the security template.</p> <div style="border: 1px dashed gray; padding: 10px; margin: 10px 0;"> <p> Note: The description can be a maximum of 50 characters, including spaces.</p> </div>
Allow User to Add Groups	Selected by default. Users who are attached to this security template can select from a list of existing Groups in your EMS database to add to the users' accounts when submitting a request or making a reservation.
Allow User to Add Contacts	Select this option if you want users who are attached to this security template to be able to select from a list of existing Contacts in your EMS database when submitting a request or making a reservation.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users who are attached to this template to be able to specify a default Contact for a selected Group when submitting a request or making a reservation.

Assign Roles to Users

- Roles are the tasks that an assigned user can do. Open the **Roles** tab, and on the Available list, select the role (CTRL-click to select multiple roles) for the user(s) are to be assigned to this template, and then Move (>) to the Selected list.

Role	Description
Allow Check In	Allows a user to check in to a booking from EMS Web App, the EMS Kiosk, and EMS Mobile App.
Browse Events	Provides access to the Events calendar in EMS Web App.
Browse	Allows a user to browse for available rooms in a Schedule view.

Role	Description
Create\Edit an Account	For the (unauthenticated user) template, allows a new user to create his/her own EMS Web App user account. This new everyday user account is set to active or pending based on your EMS Web App parameter settings. For the authenticated users, this role determines if an existing everyday user can access the Edit My Account area within EMS Web App.
Custom Events	Provides access to any custom events calendars created.
Delegation	Allows EMS Web App users to delegate control of their reservations (new and existing) to other EMS Web App everyday users.
Browse People	Allows an EMS Web App user to view a specific Group's reservations for today.
Location Details	Allows a user to view details (room type, size, phone, features, setup types, images and so on) about a room.
Login\Logout	Allows an anonymous user or "guest" to log in to EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a EMS Web App user to view and book rooms on a floor plan.
View Reservation Summary	Allows an EMS Web App user to view the Reservation Summary page when the user clicks on the link from notification/confirmation emails. Note that the reservation owner, or delegate of the owner, can view the Reservation Summary page through the email link even if the role has not been assigned. Administrators can use the View Reservation Summary role to limit access to reservation information from forwarded emails.
Web Administrator	Provides access to various administrative functions within EMS Web App such as clearing the cache, enabling help text edit mode, and enabling detailed errors.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.
Kiosk Provisioning	This role allows users to log into the EMS Kiosk App as an Administrator and provision profiles.

Set Tooltip Display

5. The **Booking Details Display Fields** tab houses the information that appears when a EMS Web App user browses events in the Browse Events area or browses for space in the Browse for Space Area. Open this tab, and on the Available list, select the information you want displayed (CTRL-click to select multiple items), then Move (>) to the Selected list.

Finalize the Template

6. Click **OK**. The security Template dialog box closes. The changes are saved to the template and you return to the security Templates window.



Note:

You can delete a security template by selecting it from the Everyday User Security Template window and clicking **Delete**. If the template is assigned to a user, you will be prompted to assign another template to that user before deleting it.

You can also print a security template information with the **Print** button, which will print a list of your templates or a list of user roles showing how they are mapped to security templates.

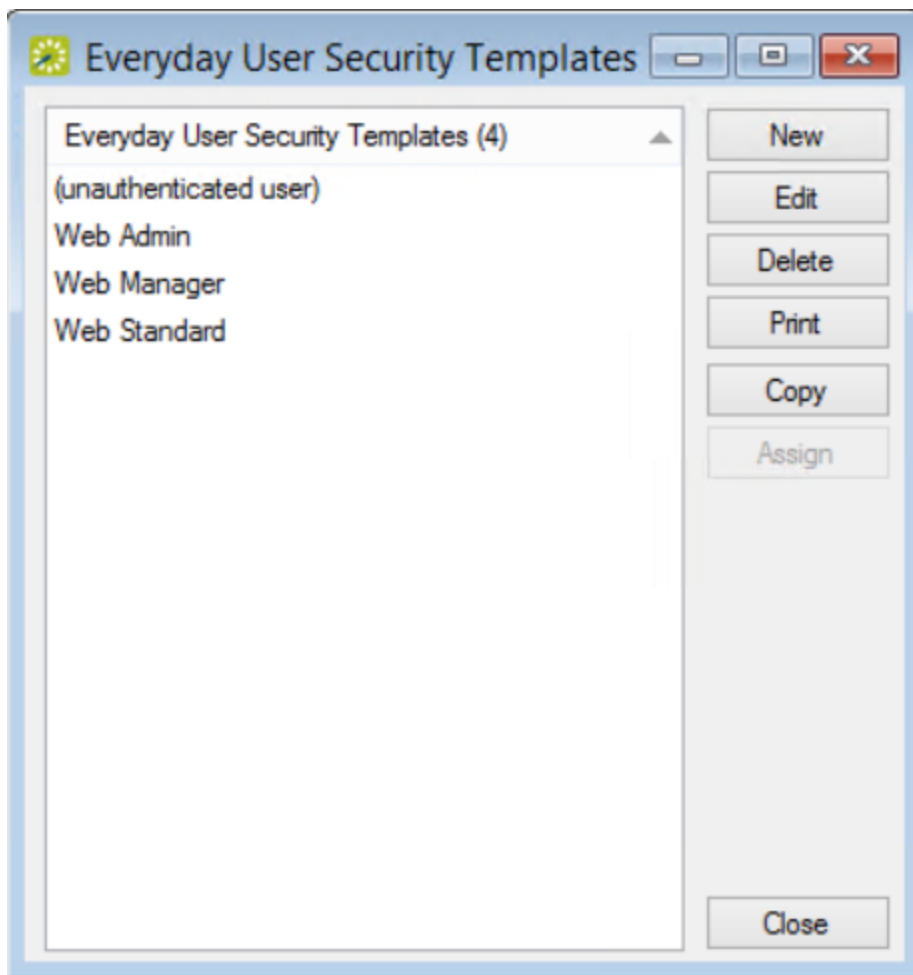
See Also:

- [Everyday User Security Template Field Definitions](#)
- [Assign Security Templates to Multiple Everyday Users](#)
- [Configure EMS Web App Menus](#)
- [Configure Intents](#)
- [Configure Help Text](#)
- [Configure Web Text](#)
- [Configure Language Translations](#)
- [Configure Confirmation Behavior for Everyday User Applications](#)
- [Create Templates for Desks and Workspaces](#)
- [Everyday User Process Template Field Definitions](#)
- [How Do I Allow Invitations on a Booking Template?](#)

CHAPTER 42: Assign Security Templates to Multiple Everyday Users

When you configure an everyday user, you can assign one security template and multiple process template to that user. Instead of assigning templates one at a time to individual everyday users, you can assign a security template to multiple users in a single step.

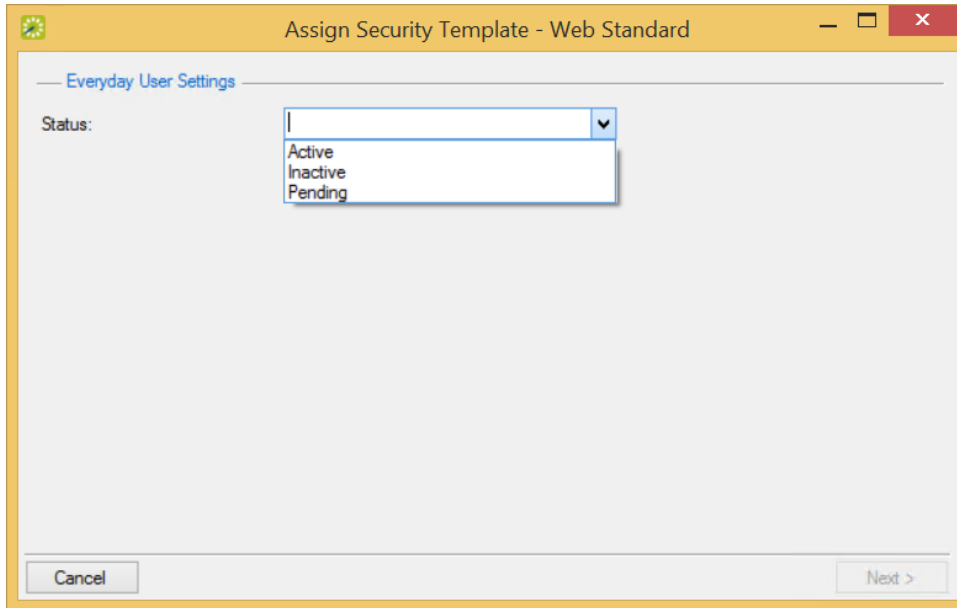
1. On the EMS menu bar, click **Configuration > Everyday User Applications > Everyday User Security Templates**. The Everyday User Security Templates window opens. The window lists security templates that have been defined for your implementation. The "(unauthenticated user)" template is reserved for guest users.



Everyday User Security Templates Window

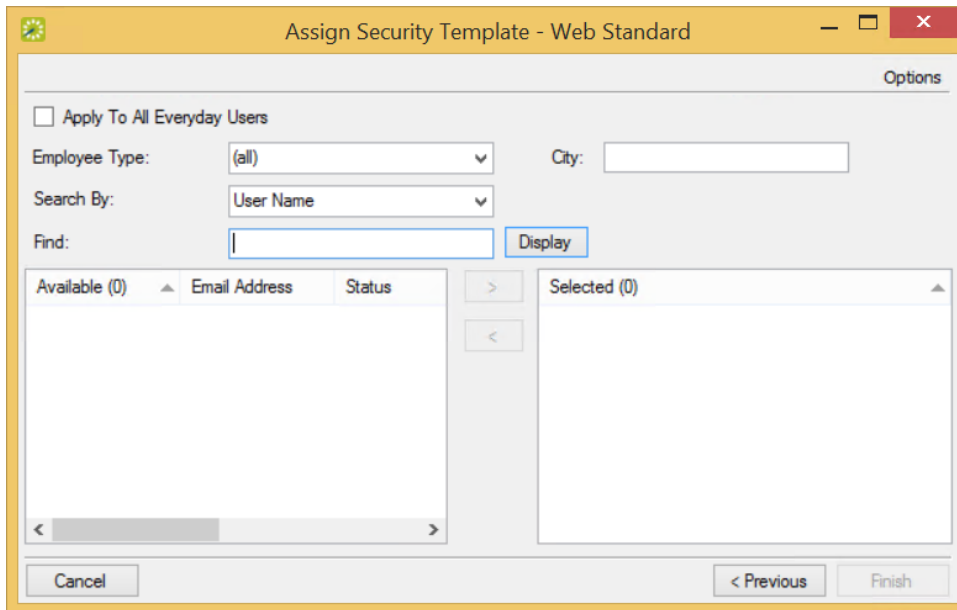
2. Select a security template other than "(unauthenticated user)" to assign to one or multiple users, and then click the **Assign** button. The Assign Security Template window opens, first prompting you to

filter everyday users by status.



Assign Security Template Window – Status

3. Select the user status and then click **Next**. The Assign Security Template window updates to list users to whom you can assign the security template.




Assign Security Template Window – Everyday Users

4. Narrow the selection of users you want to assign to the template using either of the following methods:
 - To assign the selected security template to all the users you picked in Step 3, click the **Apply to All Everyday Users** checkbox.
 - To assign the security template to only a few of the users you picked in Step 3, search for them in the **Find** field (using the other fields in this area to narrow your search), and click **Display**. The users who meet your search criteria are displayed in the Available list.
5. On the Available list, select the user (CTRL-click to select multiple users) to whom you are assigning the template, and then Move (>) to the Selected list.
6. Click **Finish**. A message confirms that the template was assigned successfully.
7. Click **OK** to close the message and return to the Everyday User Security Templates window.

CHAPTER 43: Everyday User Security Template Field Definitions

Security Template Tab

Option	Description
Description	<p>The name for the web security template.</p> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;">  <p>Note: Maximum of 50 characters, including spaces.</p> </div>
Allow User to Add Groups	Enables users to add existing Groups for which they book space to their accounts. Selected by default. Users can add existing Groups for which they make reservations to their accounts.
Allow User to Add Contacts	Enables users to indicate if a Contact should appear by default when the Group is selected for a reservation. Select this option if you want users to add existing Contacts to existing Groups on their account.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users to assign default contact for a Group when making reservations.

Roles Tab

Role	Description
Allow Check In	Allows a user to check in to an event in rooms requiring check-in.
Browse Events	Allows the user to view a schedule of events at the organization as well as more information about these events.
Browse Locations	Allows the user to view a schedule view of rooms at the organization.
Create/Edit an Account	Allows new unauthenticated users ("guests") to create user accounts (set to Active or Pending based on your parameter settings). For authenticated users, allows users to change their account information.

Role	Description
Custom Events	Allows users to view a customized schedule of events created by an Administrator using the Generate Custom Link utility.
Delegation	Allows users to assign other users as delegates for impersonation.
Browse People	Allows users to look up Groups at their organization to see where these Groups are meeting today.
Location Details	Allows users to view details (room type, size, phone, features, setup types, images and so on) about a room or a building.
Login\Logout	Allows unauthenticated users ("guests") to log in to EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a Everyday User to view and book rooms on a visual floor plan. If licensed for the additional Floor Map module, users can view and request rooms from a floor map of a building.
Web Administrator	Enables the Admin Functions menu option for these users designated as administrators. The menu controls various administrative functions within EMS Web App, such as clearing the cache, enabling help text edit mode, displaying detailed error messages, and configuring optional integration modules.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.
View ReservationSummary	<p>This security role allows Administrators to configure unauthenticated access for viewing reservation summary details.</p> <p>For example, if a host forwards a confirmation with a View Reservation Summary link, this security role allows the recipient to view the full details of the reservation when clicking the summary link.</p>

CHAPTER 44: Email an Everyday User

Whether your organization uses Microsoft Outlook or SMTP, you can email an everyday user.

**Note:**

If your organization uses Microsoft Outlook, you can continue to use this email system to send emails to users; otherwise, to email a user using the SMTP option, your EMS Desktop Client user account must have an email address.

1. Search for the user whom you are emailing. See Also: [Searching for a user](#).
2. On the user's window, make sure that the user is selected in the lower pane, and then click **More > Email**.
Depending on how your system is configured, either a pre-addressed Outlook email form or a pre-addressed SMTP email form opens. The To field is populated with the email address that is defined for the user, but you can edit this value if needed.
3. Complete and send the email as you normally would.

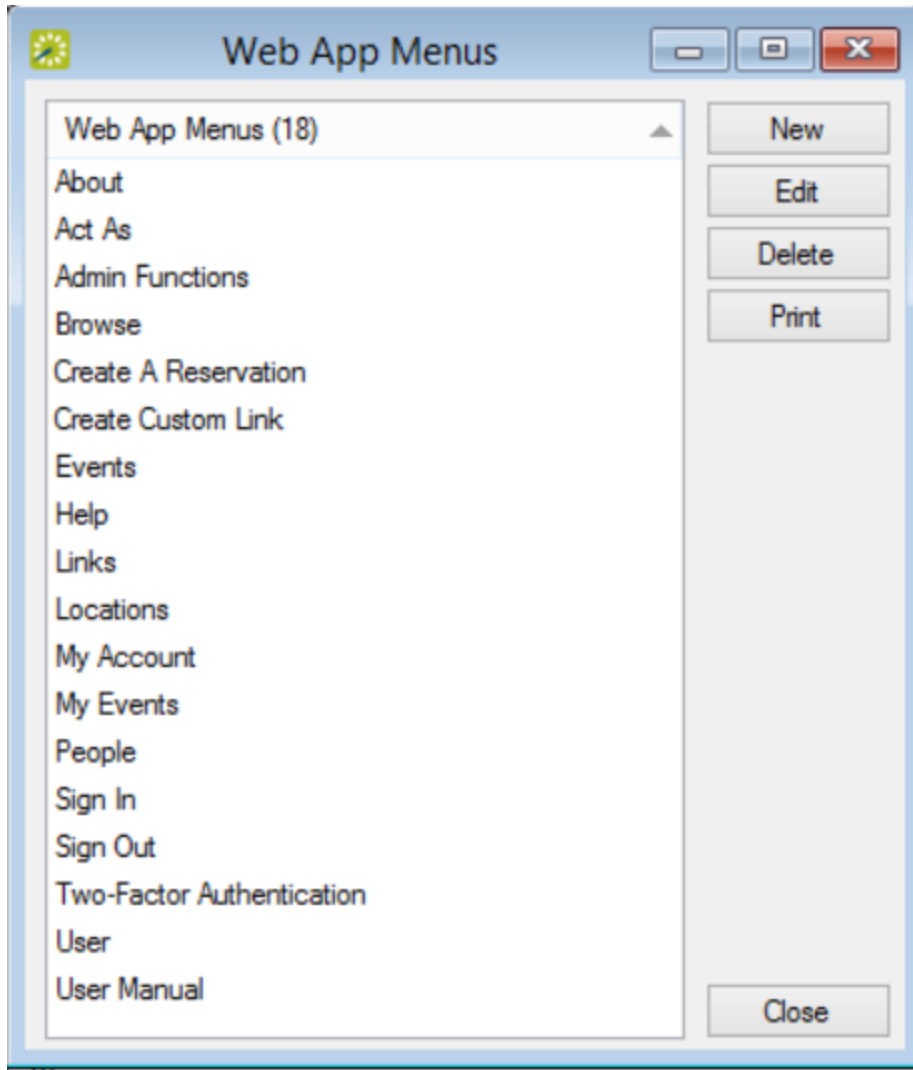
CHAPTER 45: Configure Web Menus

When EMS Web App is first installed, the main menu has a layout that determines the following:

- The default parent menu options.
- The order of the parent options in the main menu.
- The child options that appear under each parent menu option.
- The order of the child options under each parent menu option.

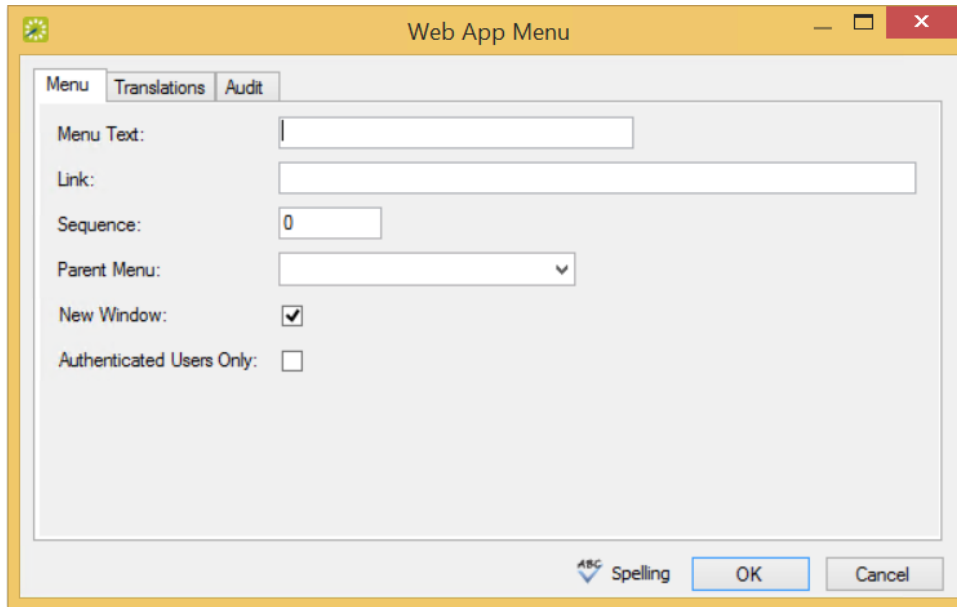
You can add customized menu items to the existing list of system menus. These custom items can be links to EMS Web App pages or to websites outside EMS Web App.

1. On the EMS menu bar, click **Configuration > Everyday User Applications > Web App Menus**. The Web App Menus window opens. This window lists all the current parent menu items and child options in alphabetical order. Buttons to the right enable you to create new menus, change existing ones, delete, and print.



Web App Menus Window


2. To configure a new menu, click **New**. The Web App Menu dialog box opens. The **Web App Menu** tab is the active tab.



Menu Tab of the Web App Menu Dialog Box

3. Enter the information for the new web menu item.

Menu Tab Field Descriptions

Field	Description
Menu Text	The text for the item as it is to appear on the EMS Web App menu.
Sequence	A number that indicates the order in which this menu option is to appear relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. <div data-bbox="511 590 1404 789" style="border: 1px dashed gray; padding: 10px;"> <p> Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.</p> </div>
Link	The URL or web address for the menu (for example, www.myorganization.com).
Parent Menu	The primary menu under which this new menu item is found.
New Window	Select this option if this new menu item should open in a new browser window or tab (with EMS Web App remaining open behind the new window or tab).
Authenticated Users Only	Select this option if access to this new menu item is restricted to only those users who have logged in to EMS Web App.

- If translations have been defined for web templates (see [Configuring Language Translations](#)), then open the Translations tab, and for each translation, click in the **Text** field, and enter the appropriate translation for the menu item.
- Click **OK**. The Web App Menu dialog box closes and returns you to the Web App Menus window with the newly configured menu option displayed in the window.

**Note:**

If you have EMS Web App open, you might have to log out and then log back in to see the new menu item.

CHAPTER 46: Configure Help Text

Since the EMS Desktop Client is the "backbone" for all editions of EMS, such as EMS Web App and EMS Kiosk, it enables you to customize the text that appears to users of those applications in your organization. This help text displays on various pages in EMS Web App, EMS Kiosk, EMS for Outlook, EMS Campus Planning Interface, and the EMS Floor Plans Utility. As the EMS administrator, you can configure this help text in EMS, or if you are assigned to an appropriate everyday user security template (which has administrator access), you can configure it directly in EMS Web App.

This topic provides information about the following:

- [Configure Help Text in EMS Desktop Client](#)
- [Configure Help Text in EMS Web App](#)
 - [Enable the Custom Help Text Feature](#)
 - [Navigate to Pages in EMS Web App and Customize Help Text](#)

See Also: [Configure Web Text in EMS Desktop Client](#)



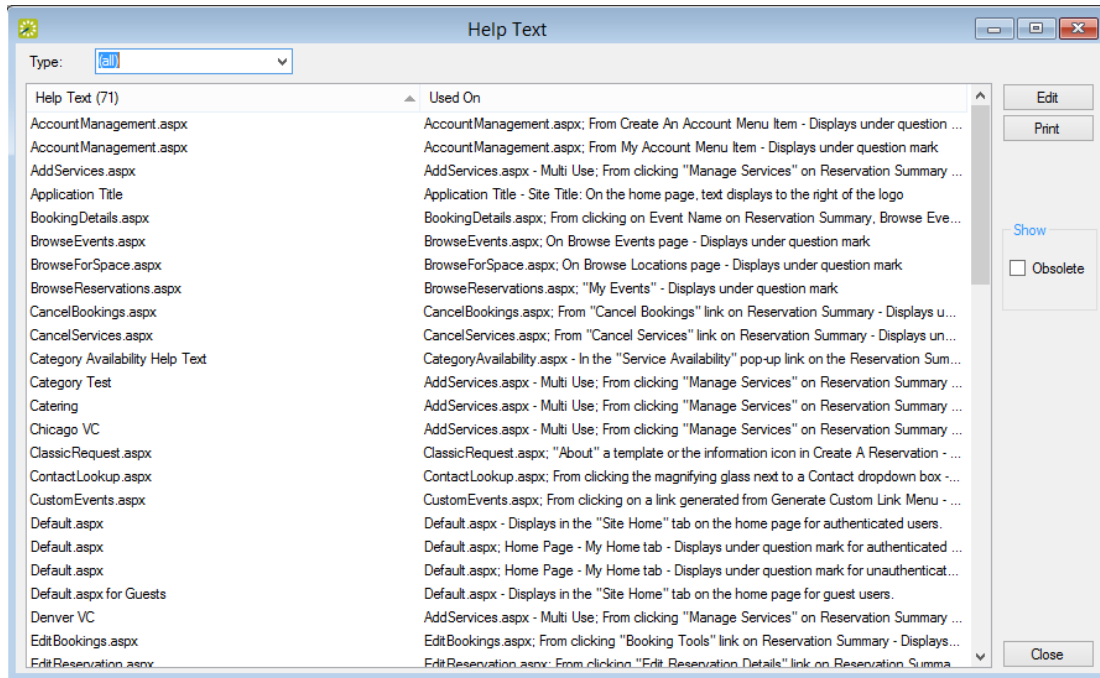
Note:

Depending on your organization, configuration in the EMS Desktop Client might need to be performed by a different type of System Administrator than configuration and text customization in the EMS Web App.

Configure Help Text in EMS Desktop Client

Follow the instructions below to enable custom help text for EMS Web App and/or EMS Kiosk.

1. On the EMS menu bar, click **Configuration > Everyday User Applications > Help Text**. The Help Text window opens. This window lists the name or description for all types of Help Text that is currently in use in your EMS Web App and EMS Kiosk installations and the EMS Web App or EMS Kiosk page on which it appears. To filter for only a specific type of help text, select a type on the Type dropdown list.



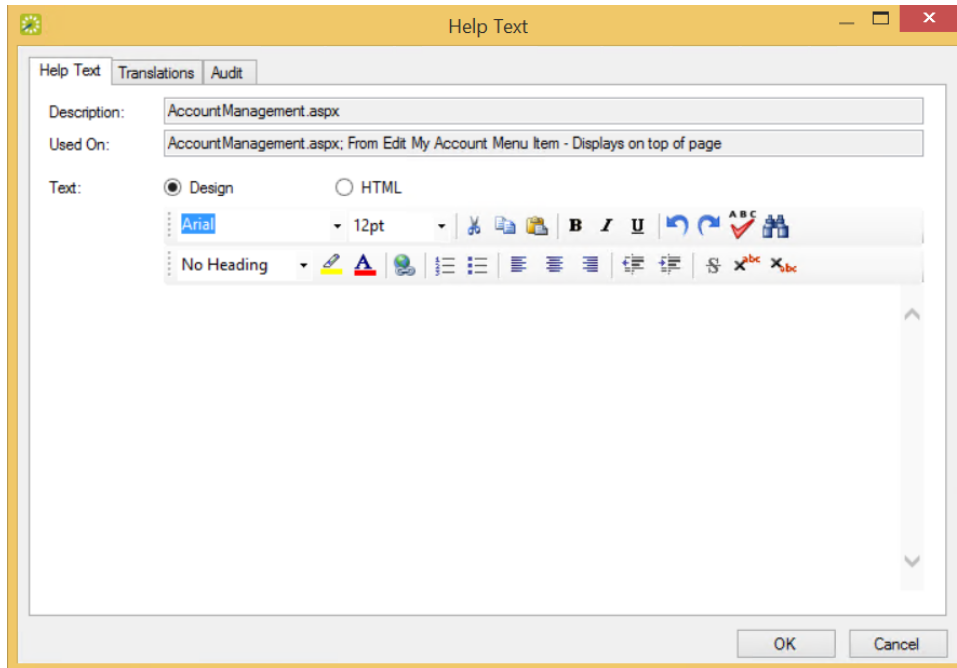
Help Text Window



Note:

You can view all help text including the text not in use: select **Obsolete**. Obsolete Help Text is displayed in red and italics in the Help Text window.

2. Select the Help Text that you are configuring, and then click **Edit**. The Help Text dialog box opens. The Help Text tab is the active tab. The tab contains options for entering and configuring the help text.



Help Text Tab

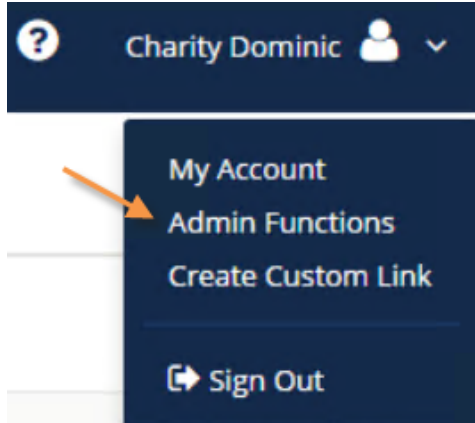
3. Configure the needed help text.
 - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the help text.
 - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the help text.
4. If translations have been defined for everyday user templates (see [Configure Language Translations](#)), then open the **Translations** tab, and for each translation, click in the **Text** field, and enter the appropriate translation for the Help Text item.
5. Click **OK**. The Help Text dialog box closes. You return to the Help Text window with the newly configured Help Text item automatically selected in the window.

Configure Help Text in EMS Web App

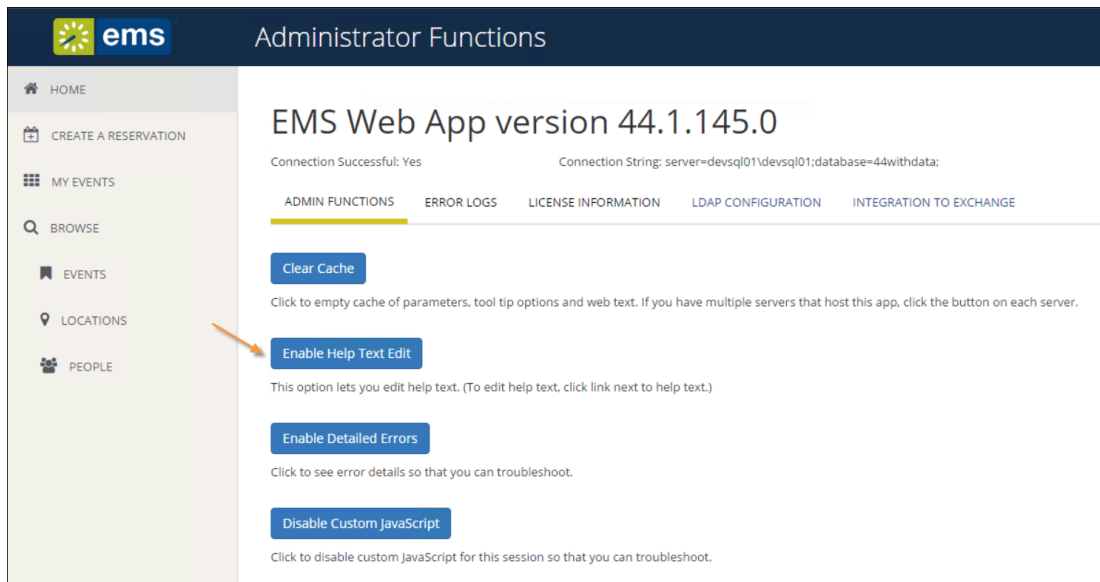
Once Help Text customization is enabled in the EMS Desktop Client, System Administrators in the EMS Web App can follow the instructions below to customize the applications help text. First, you enable the feature, then you navigate to each page in EMS Web App that you want to customize and enter help text.

Enable the Custom Help Text Feature

1. Log in to EMS Web App.
2. In the dropdown menu next to your name, click **Admin Functions**.

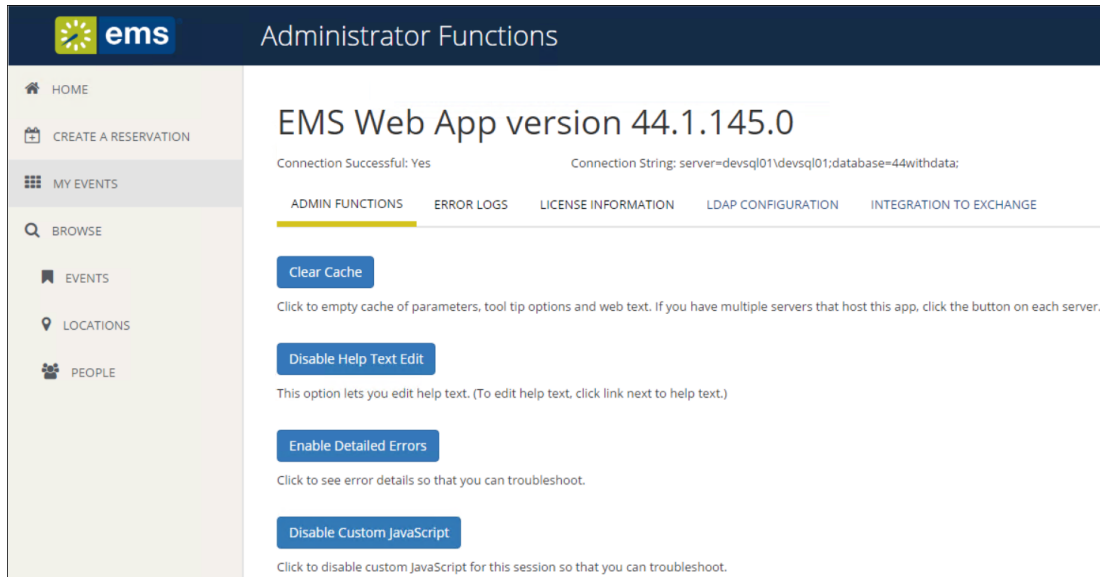


3. The EMS Web App Administrator Function page opens.



Administrator Functions Page with Enable Help Text Edit Button Showing

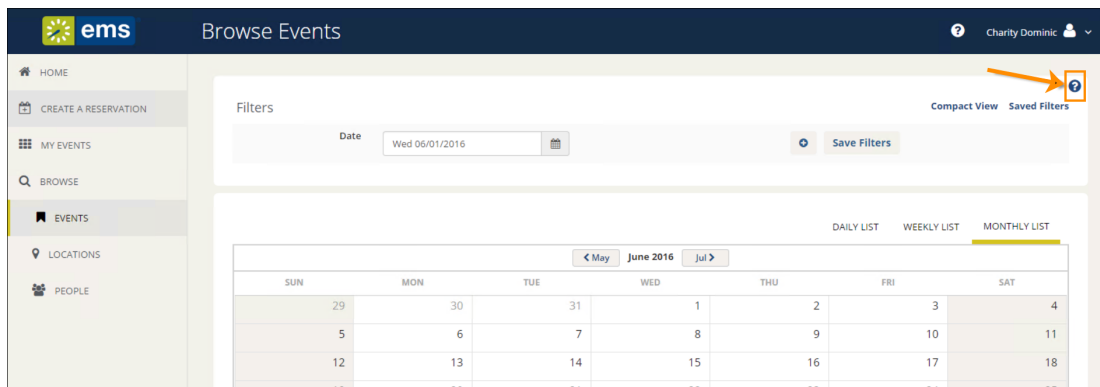
4. Click **Enable Help Text Edit**. A confirmation message appears indicating that Help Text Mode is now enabled.



Administrator Functions Page with Disable Help Text Edit Button Showing

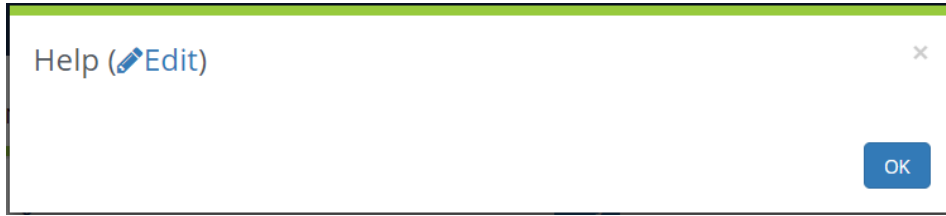
Navigate to Pages in EMS Web App and Customize Help Text

1. Navigate to the EMS Web App page where you want to customize Help text. The Edit option is available in the upper, right corner of the page.



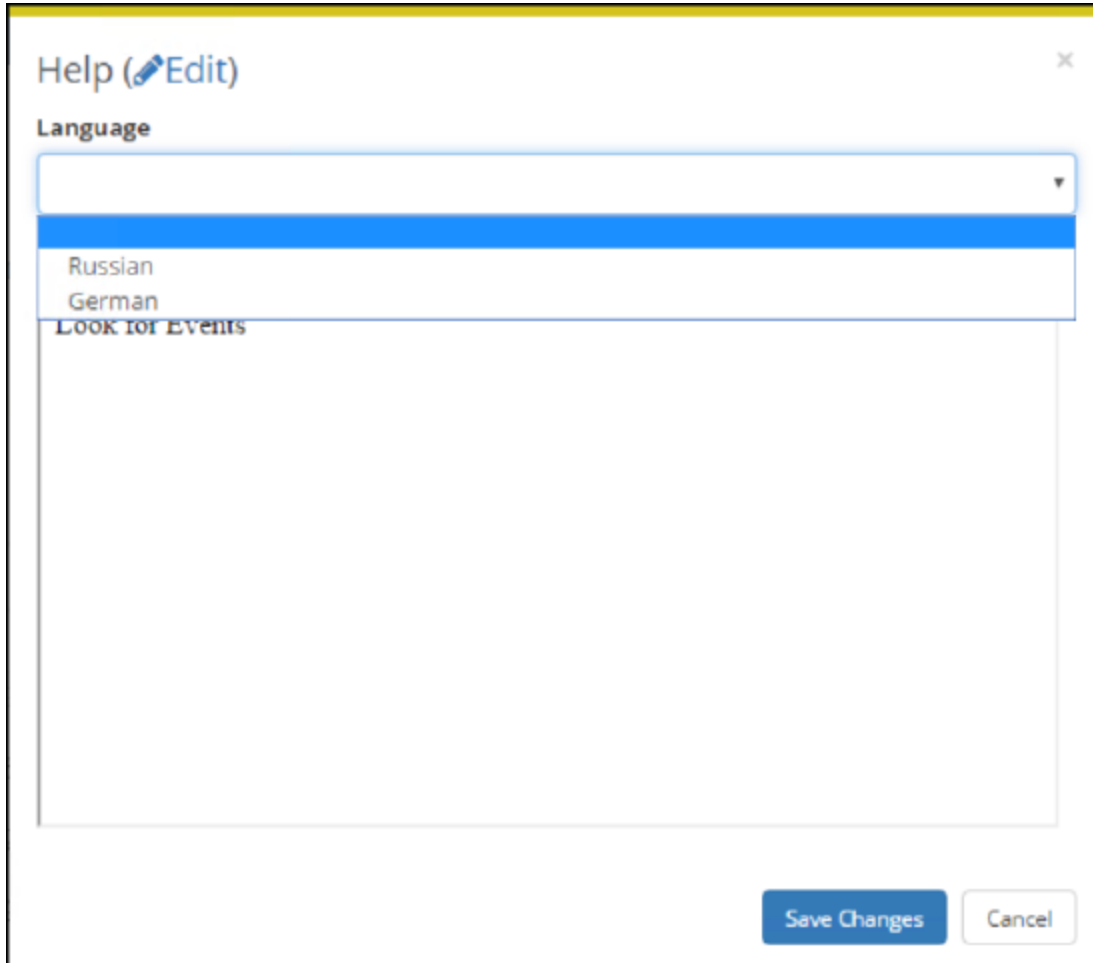
Edit Option Available in Upper, Right Corner

2. Click the option. An edit window launches where you can customize the help text (click **Edit** to enter your custom help text).




Help Text Edit Window

3. If your help text should appear in another language, select a language option in the dropdown field.



Language Field of Help Text Window (After Selecting Edit)

 **Note:** Options in the Language drop-down are controlled by another Administrator setting, see [Language Translations](#).

4. After entering and configuring the Help text, click **Save Changes** to apply the text to the selected page.

CHAPTER 47: Configure Language Translations for Everyday User Applications

**Note:**

Previous versions of EMS referred to this feature as "Web Cultures."

If you need to add language translation capability for your Everyday User templates or EMS Kiosk pages (menu text, menu items, and help text items), then you must configure language translations. Each translation you configure represents a language for which translations must be provided in your EMS Everyday User Applications.

Build Your Language Translation Spreadsheet (EMS Web App)

**Note:**

The EMS Kiosk App uses a JSON translation file instead of a translation spreadsheet. See [Configure Language Translations in EMS Kiosk App](#) for more information.


1. EMS Software provides a Microsoft® Excel spreadsheet specific to EMS Web App that contains all of the application labels, page titles, system messages and error messages with their English translations.

**Note:**

Values for data items (e.g. Event Types like "Meeting", "Training", etc. or Room Types like "Workspace", "Conference Room", etc.) configured within EMS or dynamic information that is inputted by an EMS user or Virtual EMS web user (e.g. Event Name like "HR Meeting", Comments, Special Instructions, etc.) are not translated.

2. The customer is responsible for providing the translated values for the information in the product spreadsheet. Once the customer returns the fully translated product spreadsheet to EMS Software, EMS Software development teams compile the spreadsheet into a product-specific language folder containing a set of files. (We maintain a language folder for each language).
3. The customer saves the language files in the "App_GlobalResources" folder within the EMS Web App physical directory on their web server. (The default path is C:\inetpub\wwwroot\emswebapp\App_GlobalResources\).

**Important!**

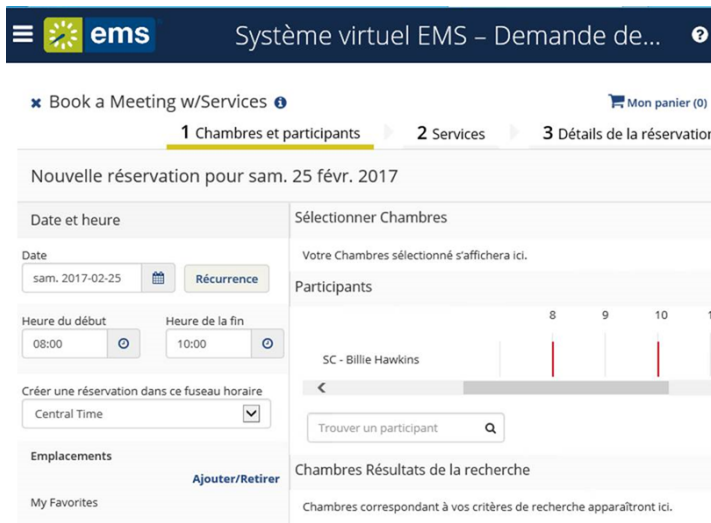
 For the translation to affect an Everyday Applications user, two conditions should be met:

- a. The language setting should be [set in Windows](#).
- b. The end user's browser Language Preference is set to that specific language and set as the default.

Example Successful Installation

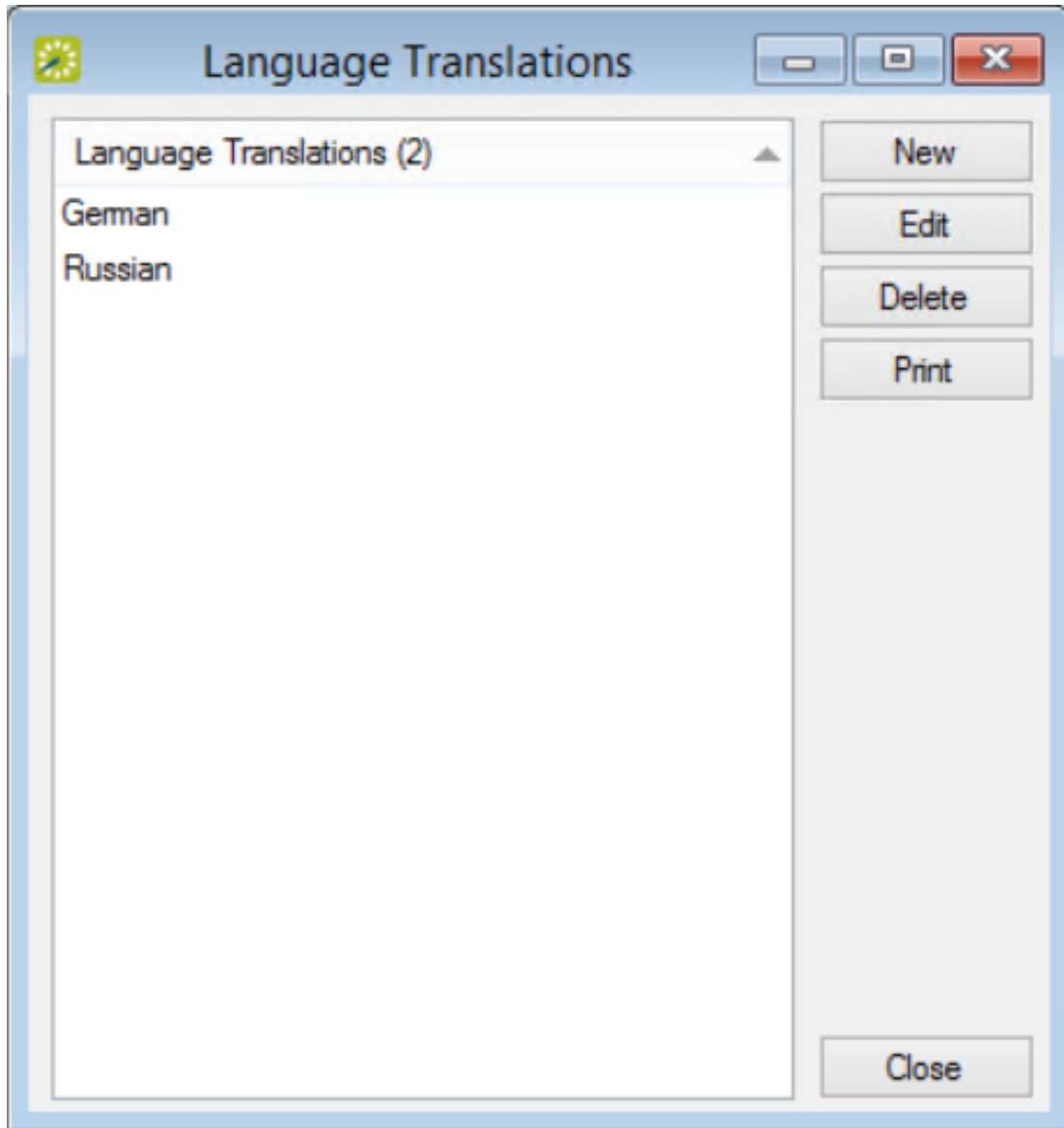


Reflected in EMS as follows (example is French-Canadian).



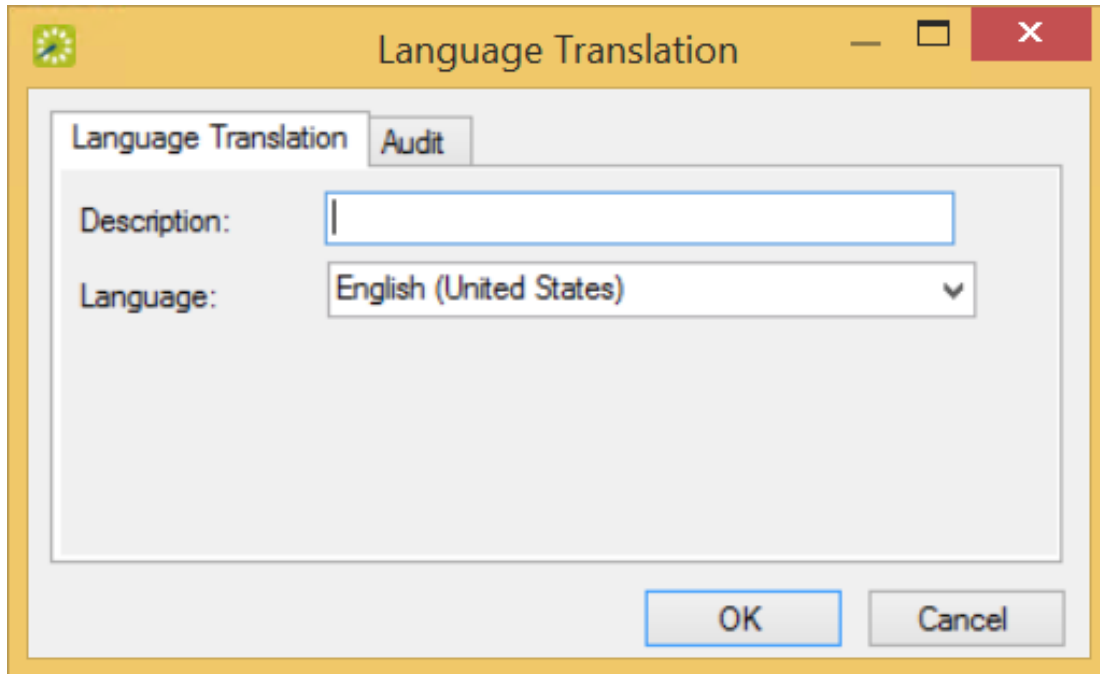
Configure Your Language Translations in EMS Desktop Client

1. On the EMS Desktop Client menu bar, click **Configuration > Everyday User Applications > Language Translations**. The Language Translations window opens, listing all the translations that are currently configured in your EMS database.



Language Translations Window

2. Click **New**. The Language Translation dialog box opens. By default, the language is set to English (United States).



Language Translation Tab

3. In the **Description** field, enter a name or description for the new web culture (up to 50 characters, including spaces).
4. On the **Language** dropdown list, select the language into which the menu text, menu items, and help text items will be translated.
5. Click **OK**. The Language Translation dialog box closes, returning you to the Language Translations window with the newly configured translations automatically selected.



Note:

After you configure a language translation, it is displayed on the Translations tab in various configuration areas in EMS.

CHAPTER 48: Customize EMS Web App

After you have installed the EMS Web App, you can customize many aspects of it, such as the appearance and security settings. For example, you can change the *look and feel* of the EMS Web App by inserting your own logo. Experienced web developers can also modify the system's style sheet to change fonts and colors.



Important!

Do not alter any of the EMS Web App web page files themselves. **The maintenance agreement for EMS Web App extends to the original page content only.**

This topic provides information on the following:

- [Customize the Logo](#)
- [Customize Style Sheets](#)
- [Customize Links](#)
- [Customize JavaScript](#)
- [Customize Security](#)

Customize the Logo

The logo that appears in the upper left corner of all pages within the EMS Web App comes from a file named LOGO.GIF found in the \EMSWebApp\Images folder of the web server. If you choose to have the system display a different logo, create a new file called CUSTOMLOGO in the same folder (any graphics file type, such as .gif, .png, etc. will suffice). If the system detects CUSTOMLOGO, the system will use that file rather than the default LOGO.GIF file. The advantage of creating the new file instead of simply replacing the LOGO.GIF file is that, in an upgrade to a new version of EMS Web App, the LOGO.GIF file is overwritten whereas CUSTOMLOGO is not. If you create a custom logo file, you might need clear your browser's cache before you see the new image.



Note:

Be sure to maintain the aspect ratio of 135 px wide X 40 px high. The system will accept nearly any size logo image, but you should avoid images more than 200 pixels wide and images that are too tall to avoid extra scrolling.

Customize Style Sheets

Experienced web developers can modify the look and feel of EMS Web App using a custom style sheet, which controls fonts and colors throughout the application. To do so:

1. Create EMSWebApp/Content/Custom folder on your web server.
2. Name your custom style sheet CUSTOM.CSS and place it in the EMSWebApp/Content/Custom folder. If the system detects this file, it will use the styles found there rather than those in the system's default style sheet, VEMS.CSS. The advantage of creating the new file instead of overwriting the default file is that, in an upgrade to a new version of EMS Web App, VEMS.CSS is overwritten whereas CUSTOM.CSS is not.

Customize Links

The EMS Web App Browse Events page allows users to view all events scheduled in EMS that display to everyday users. You have the option to automatically filter this list of events by facility, room, event type, event name or group name as part of a customized Browse Events page. This customized page is referred to as a Custom Link.

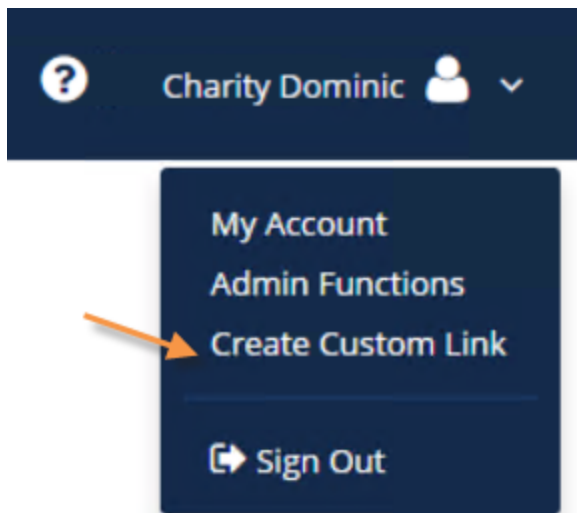


Note:

A Custom Link enables you to build a link based on the Browse Events page that will display only events meeting your specified criteria. For example, you can create a link that only displays events in a specific Building or of a specific Event Type. Essentially, the link pre-filters the event listing displayed to a specific building, event type, Group, etc. Once you generate the link, then you can insert it in emails or websites.

To create a Custom Link, follow the steps outlined below.

1. Log into EMS Web App using a user ID that belongs to a Everyday User Security Template containing the Web Administrator Role. For information on how to configure a user and/or Everyday User Security Template, see [Configure Everyday Users](#) and [Configure Security Templates](#).
2. Under the dropdown menu next to your name, click **Create Custom Link**.



3. Specify the pre-filters that will control what displays when users click your custom link.

ems Generate Custom Link

HOME
CREATE A RESERVATION
MY EVENTS
BROWSE
EVENTS
LOCATIONS
PEOPLE

Filter Type*
Room

Facilities
Denver Main Office

Select Item*
Pikes Peak

Display Format
Daily List

Custom Link Logo
Provide the full server path and the name of the logo.

Title
: Peak Denver Daily Schedule

Ignore Everyday User Application Display Settings
 Collapse Bookings to Reservation-Level

Create Custom Link

81x32bit13v2/EmsWebApp/BrowseForSpace.aspx



Note:

To display a custom logo other than the default logo used for your EMS Web App site, enter the logo filename and server path in the Logo field. The logo needs to be stored in the EMS Web App physical directory on your web server (typically, C:\inetpub\wwwroot\EMSWebApp\).

Select the **Ignore Everyday User Application Display Settings** option if you want all events within your criteria to display to users using this link regardless of everyday user display settings (essentially, ignoring configuration rules that would normally hide certain events from view).

Select the **Collapse Bookings to Reservation-Level** option to collapse booking information so that only the reservation information shows.

Collapse Bookings to Reservation Level Enabled	Collapse Bookings to Reservation Level Disabled
<div style="border: 1px solid black; padding: 5px;"> <p>18</p> <p>8:00 AM - 9:00 AM Town Hall</p> <p>9:00 AM - 10:00 AM VTC</p> </div>	<div style="border: 1px solid black; padding: 5px;"> <p>18</p> <p>8:00 AM - 9:00 AM MT Town Hall DEN - Multi-Purpose 1208A</p> <p>9:00 AM - 10:00 AM AM MT VTC DEN - Conference 1105</p> <p>10:00 AM - 11:00 AM AM CT VTC CHI - Sharyl's Office</p> <p>11:00 AM - 12:00 PM PM ET VTC NY - VTC 3650</p> </div>

- Click the **Generate Link** button to display a friendly URL and HTML code that can be added to a web page, email, etc. The URL can also be used to test your Custom Link.



6. Create the CustomJs folder within the root of your EMS Web App Install Directory (typically, C:\inet-pub\wwwroot\EMSWebApp\CustomJs).

You are now ready to implement your Custom JavaScript using one of several options:

- In the newly-created CustomJs folder, create a file for each of the above pages you want to include your custom JavaScript on (such as RoomRequest.js, EditReservation.js, or Default.js).
- In the newly-created CustomJs folder, create one file called global.js that will be included on every page in the system.

Your custom JavaScript should be included on global.js **or** on each of the applicable page-specific JavaScript files.



Important!

If you include the script in both places, it could cause problems.

Customize Security

There are settings in the web.config file that you can customize to enhance website security. For more information regarding these security settings, [contact EMS Support](#).

Contact Customer Support

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

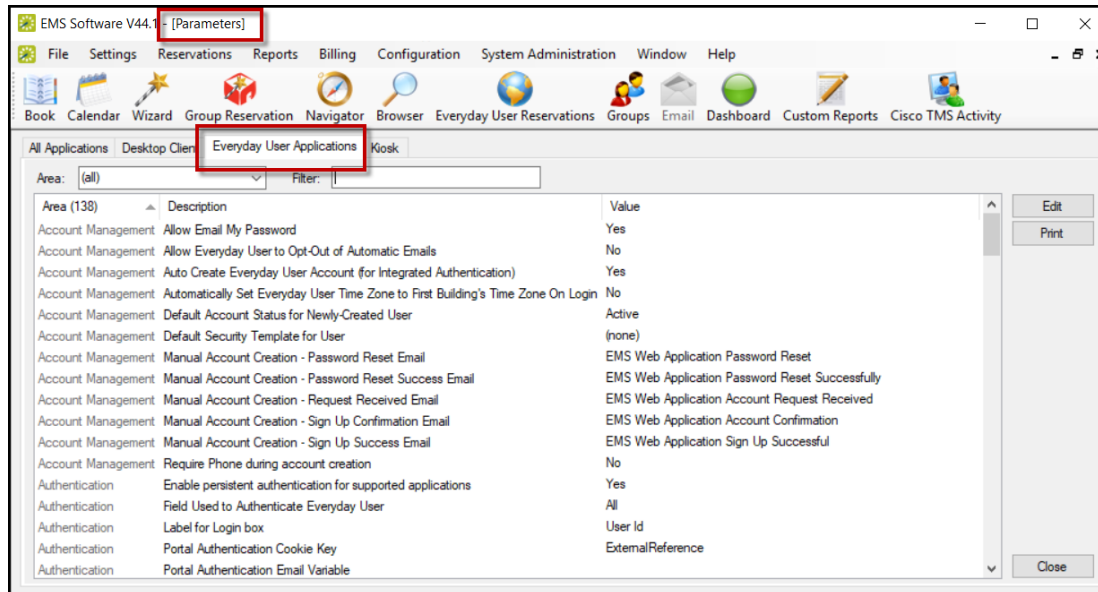


Important!

If you do not have a customer login, register [here](#).

CHAPTER 49: EMS Web App System Parameters

Parameters for the EMS Web App are configured in the EMS Desktop Client. As an EMS Administrator, you can access these parameters by navigating to **System Administration > Settings > Parameters > [Everyday User Applications](#)** tab.



Parameters for the EMS Web App

CHAPTER 50: EMS Web App User Guide

EMS Web App is an optional web application to access online. EMS Web App lets you see your schedule, create new reservations, and change existing reservations.

If you have deployed an older version of EMS Web App and are upgrading to the newest version, please encourage users at your facility to review {see What's New} before they begin working with the new version of the software. Doing so will streamline the adoption of the new release and help your users benefit from new features and functions that they might not otherwise discover.

The EMS Web App provides extensive space management functionality so that web users, including guests and temporary visitors, can view and book space while on-the-go, using any web browser.

This *User Guide* will provide the following information:

- [Get Started with EMS Web App](#)
- [Browse Events, Locations, and People](#)
- [Create a Reservation in the EMS Web App](#)
- [Personalize Your Account](#)
- [Mobile Web App](#)
- [Learn About the EMS Web App](#)
- [Skype for Business in the EMS Web App](#)

CHAPTER 51: Get 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. To get started, see the following topics:

- [Log In and Out](#)
- [Check In To Events](#)
- [Introduction to the Home Page](#)
- [Create Your Login or Get a New Password](#)

**Note:**

Upgrading Users may know EMS Web App as VEMS. For details about the enhancements in this new release, see [What's New](#).

CHAPTER 52: Log In and Out

You can access EMS Web App through any standard Internet browser. This topic provides information on the following:

- [Log In](#)
- [Log Out](#)

Log In

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 and prompts you to sign in.

Note: If your Administrator has enabled Guest Accounts, you can create a Guest Account using the green buttons to the right. When logged in through a Guest Account, you can request rooms; however, 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. Click **Sign In**. The window changes to show your MY HOME and offer more options for creating reservations and for browsing events, locations, and people. For an overview, see [Introduction to the Home Page](#).

The screenshot shows the EMS Web App Home page. The top navigation bar includes the EMS logo, the word 'Home', a help icon, and 'Welcome, Guest.' with a user icon. A left sidebar contains navigation options: HOME, BROWSE, EVENTS, LOCATIONS, and LINKS (with sub-links for Georgia and Alabama). The main content area has tabs for 'SITE HOME' and 'MY HOME'. The 'Sign In' section contains an 'Email Address' field (marked with a red '1' and 'Required to log in'), a 'Password' field, and a 'Sign In' button. Below the password field is a link: 'I've forgotten my password.' To the right, a 'Welcome, Guest.' section features a green 'Request An Account' button and a text box stating: 'This area may contain options to Create An Account or Request a Room (as a guest)'.

Log Out

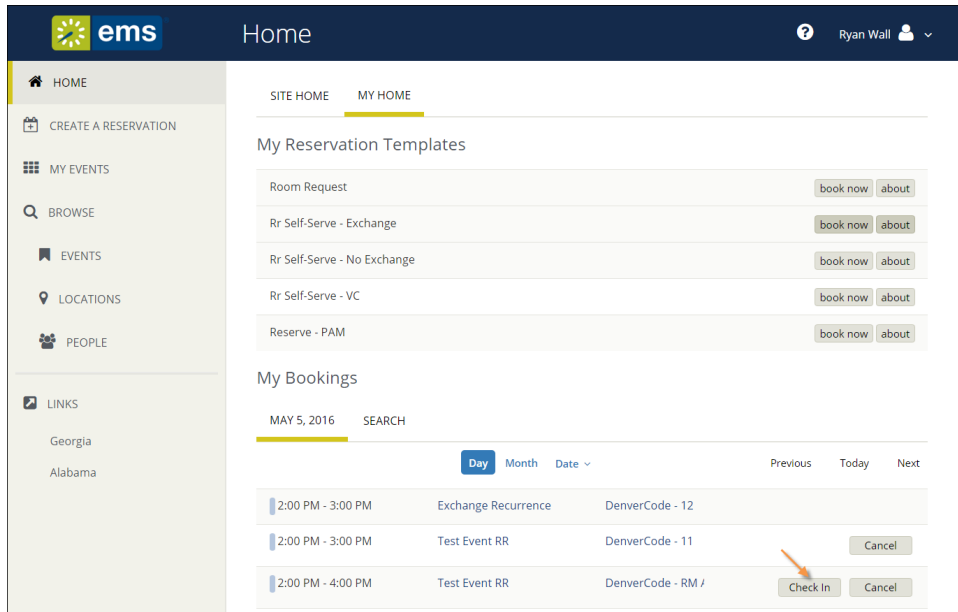
1. To log out, click the dropdown arrow under your name in the upper-right corner of the EMS Web App window.
2. Click **Sign Out**.



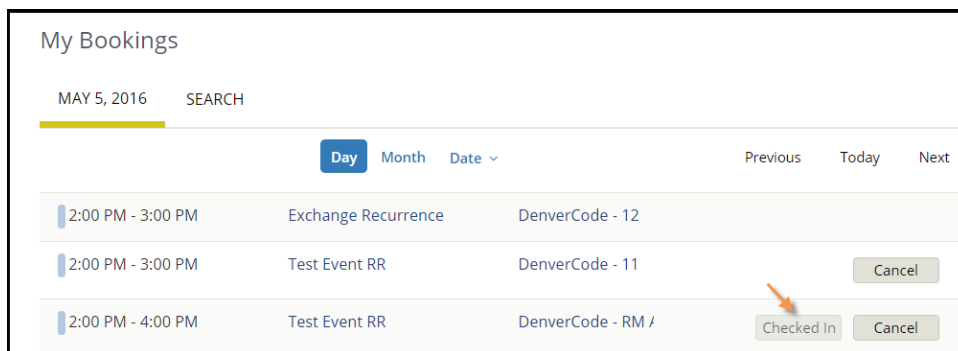
CHAPTER 53: Check In To Events

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.

CHAPTER 54: 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**.

**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

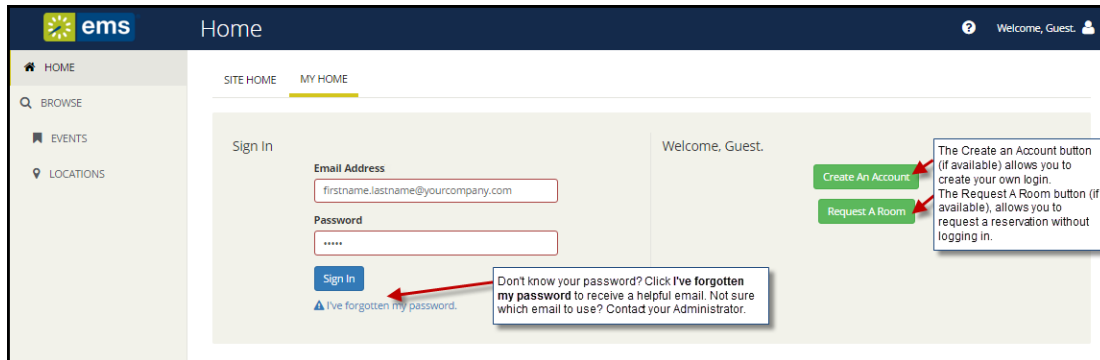
Note: Anywhere you see "... " on a room name, you can click to expand and see the full room name.

Site Home

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

CHAPTER 55: Create Your Login or Get 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.



Note:

If enabled, you can 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 might 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 might 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.

CHAPTER 56: Browse Events, Locations, and People

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

This section will provide information that will allow you to do the following:

- [Browse Events](#)
- [Browse Locations](#)
- [View Floor Plans](#)
- [Locate People](#)
- [Event Details Page](#)

The screenshot shows the 'Browse Events' interface. On the left, a navigation menu is visible with the following items: HOME, CREATE A RESERVATION, MANAGE MY RESERVATIONS, BROWSE (highlighted with a red box), EVENTS, LOCATIONS, PEOPLE, and LINKS (About IAC, Rules & Policies). The main area features a 'Filters' section with 'Date' set to 'Tue Nov 17, 2015' and 'Time Zone' set to 'Mountain Time'. Below the filters is a calendar for November 2015. The calendar shows events for various dates, including '8a Long Event Example, Red Rocks' on Nov 15, '8a Morning Meeting, Demo...' on Nov 17, '11a Review, Lemon' on Nov 17, '11a Review, Lemon' on Nov 20, '11:30a Test, Pink Peak' on Nov 20, and a 'Thanksgiving Holiday' on Nov 26. A list of events for Nov 26 is shown, including '10a Review, Lemon', '11:15a Morning Meeting, B...', '11:30a Daily Meeting, Lemon', '12p Lunch', '12:30p Afternoon Meeting', '1p Standup, Pink Peak', and '1:15pm Call w/ DEA, Confer...'. A '+ 12 more events' link is also present.

Browse Section of the EMS Web App

Updates to the Browse Section

The previous version of this application, Virtual EMS (VEMS), had different menu options. See the following table for a comparison of VEMS and Web App menu options.

Menu in VEMS	Menu in EMS Web App	How Is This Better?
My Requests	Events	Expands the view to all events, instead of only those you requested
Browse for Space	Locations	Expands the view to Facilities, Buildings, Views (custom collections of space), and Room
Browse Groups	People	Expands the view to Groups, individual Users, and custom user types

CHAPTER 57: Browse Events

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



Note:

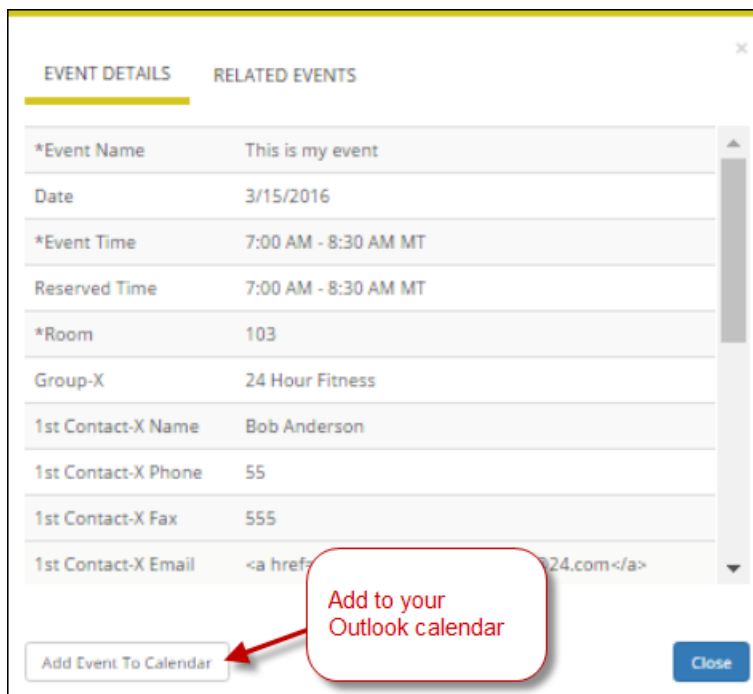
To view and work with your own reservations and bookings, see [View Your Events](#).

This topic provides information on the following:

- [Browse Events Before Making a Reservation](#)
- [Browse Events Using Filters](#)

Browse Events Before Making a Reservation

1. Click **Browse > Events** in the menu bar.
2. To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.



3. 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

Browse Events Using Filters

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

⋮

Note:

Your Administrator might 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.

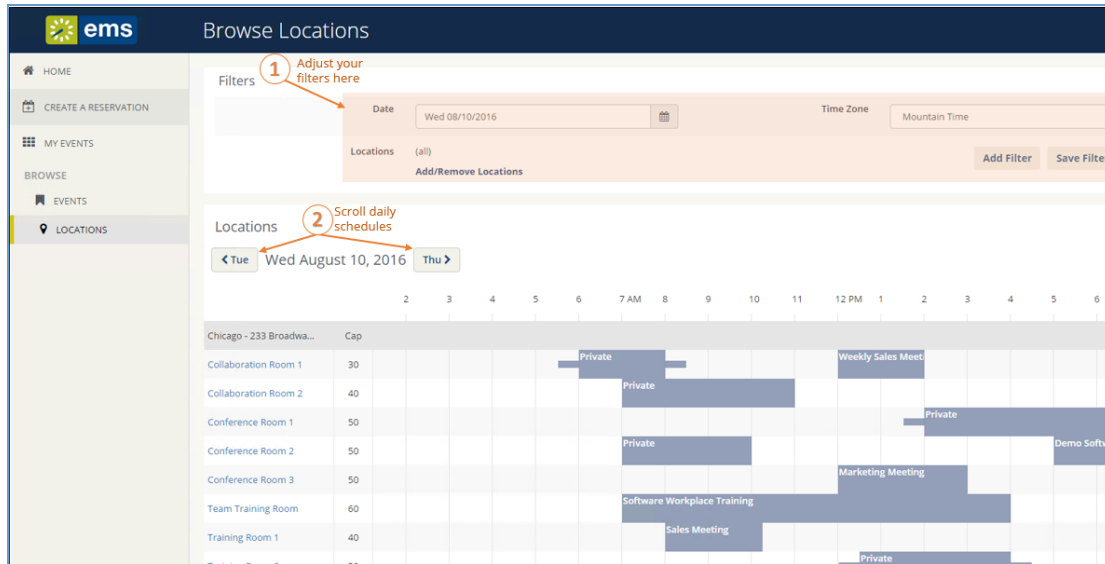
To filter in more detail, click the drop-down option.

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.

CHAPTER 58: Browse 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.



Note:

Filters along the top of the **Browse Locations** page enable you to quickly focus the view on rooms in a specific time frame 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.

1 Click to limit the list to buildings in a specific area

2 Click VIEWS to see locations by View

3 Click to refresh the list with your filters

- To learn more about a location, click the location name. The Location Details window appears (if you have permissions), showing details about the location.
- 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 [Create a Reservation in the EMS Web App.](#))

1 Click tabs to see building information

2 Click tabs to see room information

Chicago - 233 Broadway	
Building Code	CHI
Description	Chicago - 233 Broadway
Time Zone	Central Time (CT)

Conference Room 2	
Room Code	Conf 2
Description	Conference Room 2
Room Type	Conference
Size	944

Note:
 The LINKED TEMPLATES tab might be available, depending on your implementation. This option will allow you to make a reservation for this room. Once you locate a room you want 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.

CHAPTER 59: View Floor Plans

If your [administrator has associated floor plans with spaces](#) 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.

The screenshot shows the 'Room Request' interface in the EMS system. The header includes the EMS logo and the title 'Room Request'. Below the header, there's a section for 'New Booking for Thu Jun 30, 2016'. The interface is divided into several sections:

- Date & Time:** Includes a date picker set to 'Thu 06/30/2016', a 'Recurrence' button, and time pickers for 'Start Time' (8:00 AM) and 'End Time' (10:00 AM).
- Attendees:** A message states 'There was a problem accessing the Attendee services.'
- Room Search Results:** Features tabs for 'LIST', 'SCHEDULE', and 'FLOOR MAP'. A checkbox for 'Favorite Rooms only.' is present.
- Rooms You Can Reserve:** A table listing available rooms with columns for Room, Location, and Floor. An orange callout box points to a floor plan icon next to 'Collaboration Room 3' with the text 'Click to view floor plan diagrams'.
- Rooms You Can Request:** A section below the reserveable rooms.
- Left Sidebar:** Contains filters for 'Locations' (New York - 345 Park Ave. (V)), 'Setup Types' (Classroom, Conference, U-Shape, Workspace), 'Room Types' (all), 'Features' (none), and 'Number of People' (1).

CHAPTER 60: Locate People

You can click **BROWSE > PEOPLE** from the main EMS Web App menu to find a Group or Host who is scheduled to have a meeting, event, or workspace reservation. You can locate space in close proximity to a colleague with a workspace reservation or find the location of a meeting you are attending.

**Note:**

Previous releases of EMS called this "Locate a group."

To search for a reservation hosted by 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**.

**Note:**

The Search field is not case-sensitive and you can search by any portion of the Group/person's name.


While the default number of search characters is three, this number can be configured by your EMS Administrator through the **Minimum Characters to Initiate Type Ahead Search** parameter. See Also: [Everyday User Application Parameters](#).

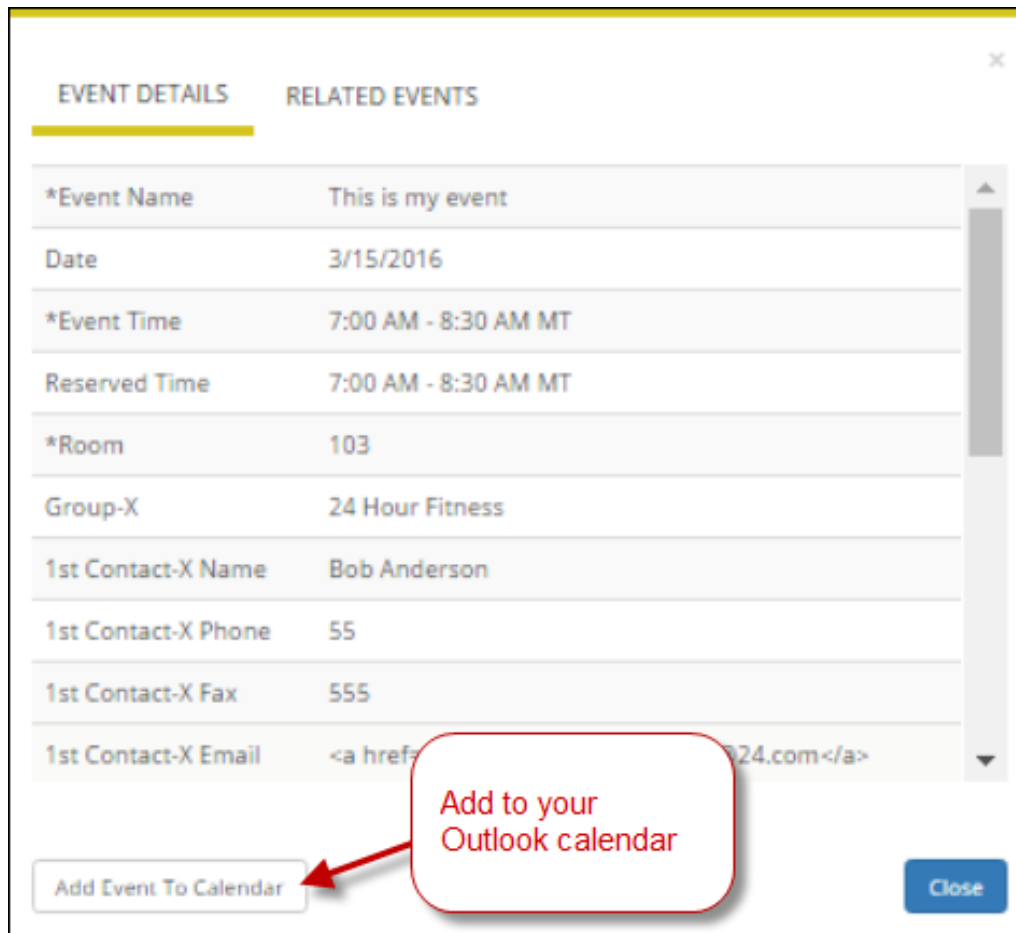
**Note:**

From the results, you can click the Event Name for more details, to add to your personal calendar, or to share on social media. You can click the Location field for more information about the location including properties, applicable set-up types and corresponding capacities, and built-in features. You can click the Floor Plan icon to reveal where the location is situated on a floor map (requires module purchase and configuration).

CHAPTER 61: Event Details Page

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

 **Note:**
To add the event to your Outlook calendar, select **Add Event to Calendar** from the Event Details pop up.



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	24.com	

Add to your Outlook calendar

Add Event To Calendar Close

CHAPTER 62: Overview of Creating a Reservation in the EMS Web App

This section provides all the information you need to create and manage reservations and bookings in the EMS Web App.

- [Creating a Reservation](#)
- [Different Ways to Create Reservations](#)
- [Viewing Your Events](#)
- [Searching for Available Rooms](#)
- [Booking Multiple Rooms](#)
- [Booking Recurring Meetings](#)
- [Booking a Video Conference Room](#)
- [Booking a Desk or Workspace](#)
- [Adding Reservation Details](#)
- [Adding Services to a Meeting](#)
- [Working with Services](#)
- [Canceling Your Reservations and Bookings](#)
- [Editing Reservations and Bookings](#)
- [Inviting Attendees with EMS for Outlook](#)
- [Notifications in the EMS Web App](#)

CHAPTER 63: Create a Reservation in the EMS Web App

This topic provides information on creating a reservation in the EMS Web App:

- [Create a Reservation](#)
 - [Specify When and Where](#)
 - [Specify Who and What](#)
 - [Choose Services \(Optional\)](#)
 - [Finalize Reservation Details](#)
 - [EMS for Outlook® \(Optional Capability\)](#)



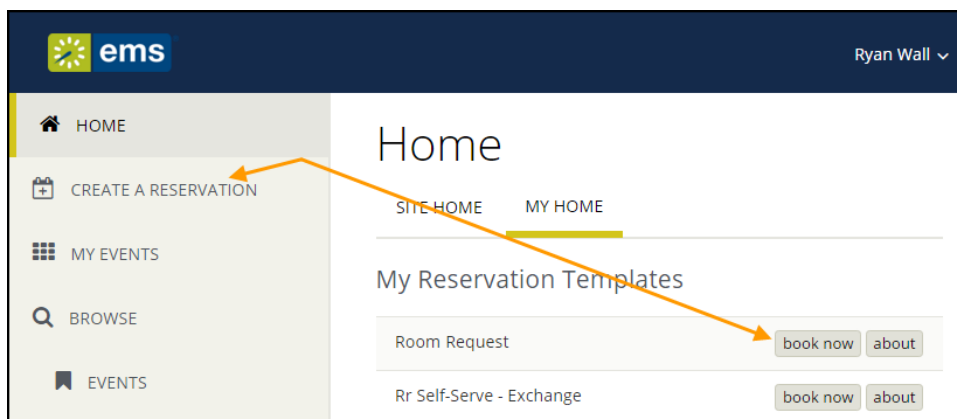
Note:

For a conceptual overview, be sure to review the following:

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

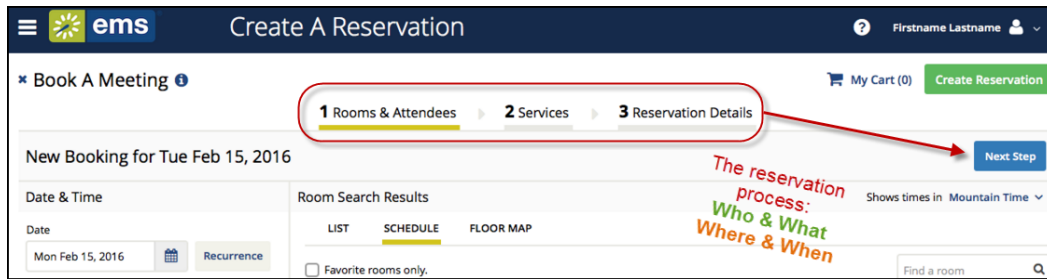
Create a Reservation

1. 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).



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

advance through the process.



Specify When and 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 one of the following:
 - **Let Me [Search for a Room](#)**
OR
 - **I Know What Room I Want**

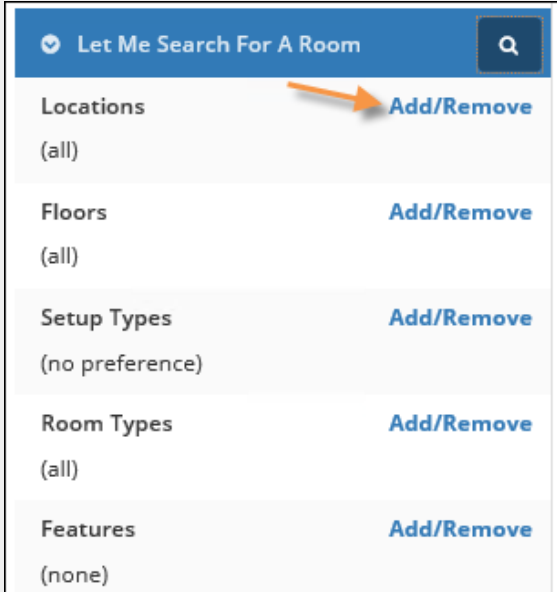


Note:

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: [Search for Available Rooms](#).

Note: Once you have [established favorites](#), EMS Web App uses these (plus the parameters of the booking template in use) to filter your search results when you use the **Let Me Search For A Room** option. To expand your search results beyond your favorites, de-select the Favorite rooms only checkbox or click **Add/Remove** next to **Locations**.

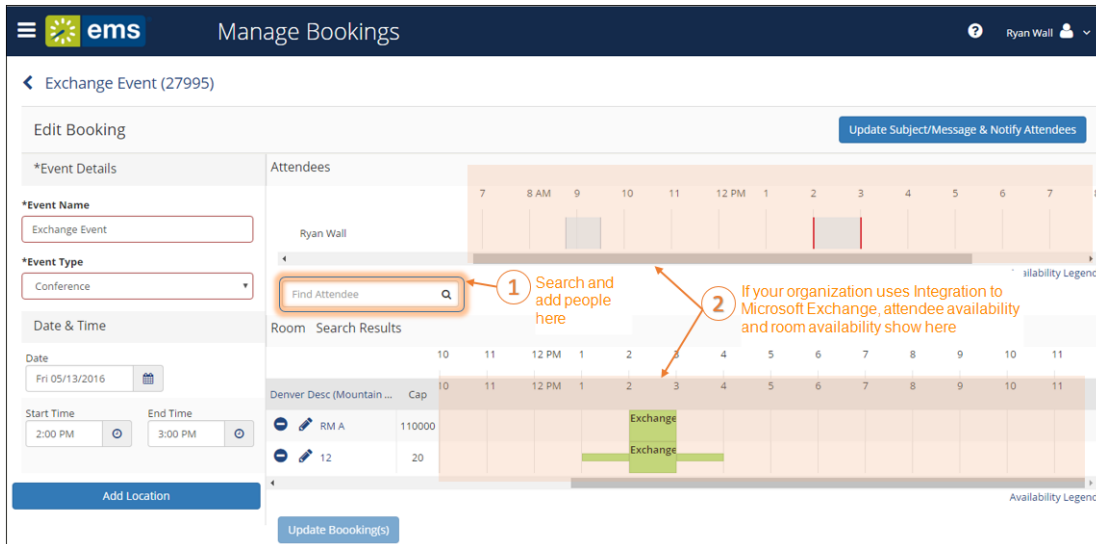


3. Once you have located a room to reserve, click the Add (+) icon to add the booking to your cart. You can delete or change the room before finalizing your Reservation.

Note: If you are booking video conferences or multiple rooms, see [Book a Video Conference Room](#) and [Book Multiple Rooms](#). Then, skip to Step 6.

Specify Who and What

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



- If your organization has installed and configured Integration to Microsoft® Exchange, you will be able to add or remove attendees and view attendee availability in the calendar grid of the Attendees section in the EMS Web App. Your attendees will also be sent invites after you finish creating the reservation. Attendees can be individuals, mailing lists, or groups; however, you cannot add attendees outside your domain. To see who is in a mailing list or group, add the list or group and click the (+) symbol next to the list or group in the calendar grid.
- If your organization does not use Integration to Exchange, you will see a list of EMS Web App users and groups, but you will not see a calendar grid showing their availability.

Note: 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](#).

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

- Once you complete all required fields on this tab, click **Next Step** in the upper-right corner.

Choose Services (Optional)



Note:

Choose Services is an optional feature based on the booking template you use. Services include room setup and teardown, equipment, and any other services you want to associate with a room. Your Administrator sets which services can be associated with a room and with an event type.

6. Under the **Services** tab in the Create Reservation screen, specify any services you want to associate with the reservation (if available, you can click **Skip Services**). The example below showing a work-

space booking may differ from your administrator settings, such as catering options and billing.

7. When complete, click **Next Step** in the upper right corner.

Finalize 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. For an in-depth overview of this part of the booking process, see [Add Reservation Details](#).

8. Complete all required information. Then click **Save Reservation Details** and **Create Reservation**.

Create A Reservation Firstname Lastname

Book A Workspace My Cart (1) Create Reservation

1 Rooms & Attendees **2 Services** **3 Reservation Details**

Reservation Details

Event Details ?

Event Name * Event Type *

Comment

Calendaring Details

Subject Show Time As Reminder

Message Private

Requestor Details

Group/Employee *

First Contact *

Second Contact

First Contact Phone First Contact Mobile

First Contact Email Address *

Attendee Attachment

Only one attachment can be sent to attendees per reservation.

Reservation Attachments

Billing Information

Billing Reference PO Number

Add this reservation to my calendar.
 I have read and agree to the terms and conditions.

**Note:**

To add the reservation to your Outlook calendar, click the **Add this reservation to my calendar** checkbox at the bottom of the window.

EMS for Outlook[®] (Optional Capability)

EMS for Outlook[®] is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS add-in icon in your Outlook application. You will also see additional features and functionality in EMS. Furthermore, 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.

CHAPTER 64: Ways to Make Reservations

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

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.

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.

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.

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.

Select from your booking templates to quickly begin a reservation.

Click **book now** next to the template you prefer to begin making a reservation.

Browse first and then choose open **EVENTS** available **LOCATIONS**.



Note:

First Browse and Then Book. To familiarize yourself with the locations in your organization, try [Browse 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. *Click for more...*

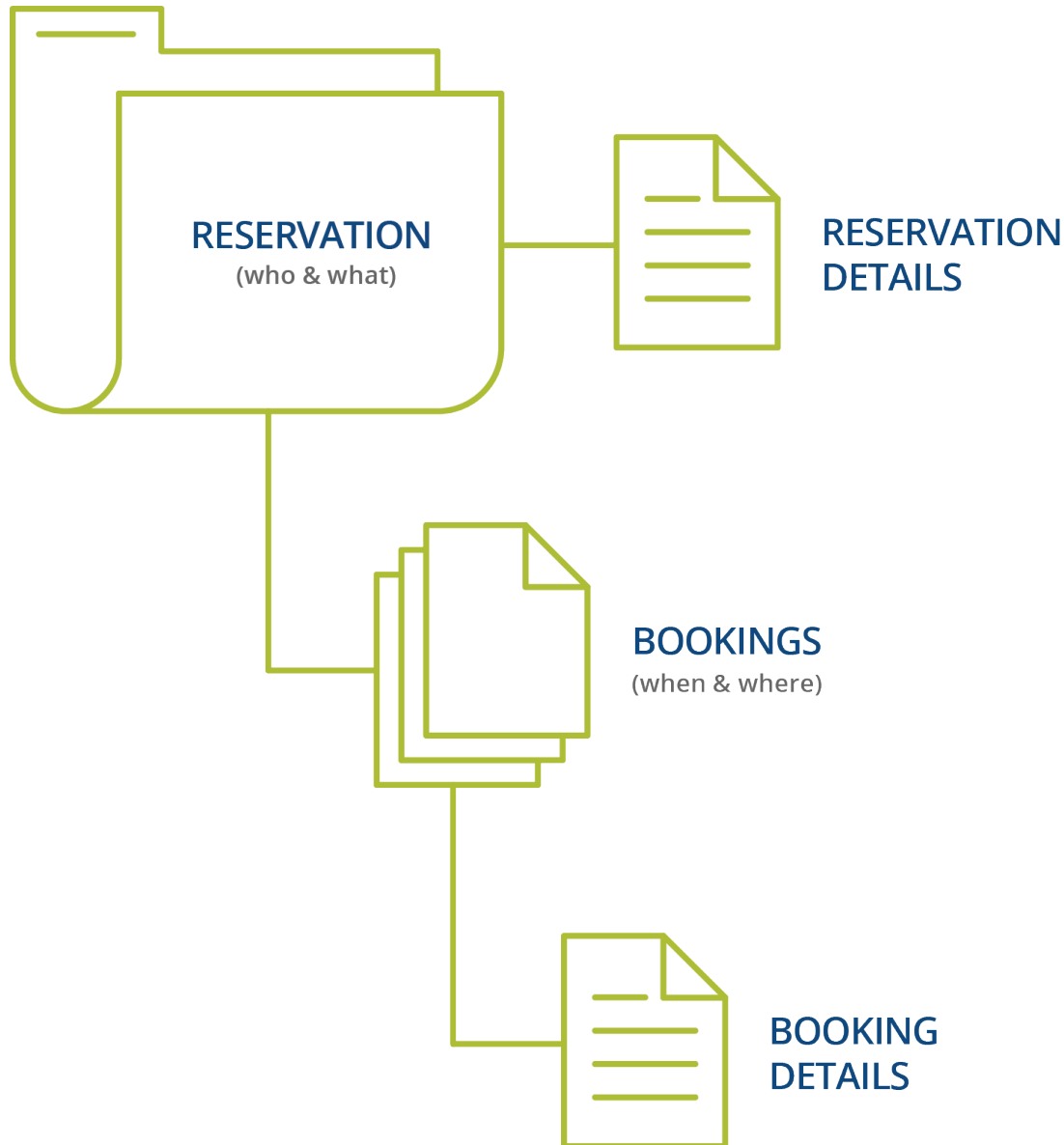
- **Templates:** Your My Account settings contain reservation Templates created by you or your Administrator to streamline the process of booking events. Rooms and workspaces are individually set to work with various types of booking templates by your Administrator.
- **Requests vs. Reservations:** Depending 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 and What, Where and 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.



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 for more...](#)
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 *Category types*: Activities, Attendees, Catering, Notes, Resources with Service Orders, or Resources Without Service Orders. These types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it, and there is nothing for a person to "select" from these types of services.

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



Note:

The following Category Types allow [Production Items](#): Catering, Resources with Service Orders, and Resources Without Service Orders.

Furthermore, a Category can be [configured to "Use States"](#) so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option in EMS Desktop Client.



See Also: [Add Booking Details Wizard](#)

CHAPTER 65: View 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.

The screenshot shows the EMS Home page with the following elements:

- Header:** EMS logo, Home page title, and user profile (Firstname Lastname).
- Left Navigation:** HOME, CREATE A RESERVATION, MY EVENTS (highlighted), BROWSE, EVENTS, LOCATIONS, PEOPLE, LINKS (Dea, Google).
- Main Content:**
 - My Reservation Templates:** A list of reservation templates with 'book now' and 'about' buttons. An arrow points from the 'MY EVENTS' menu to this section.
 - My Bookings:** A table showing bookings for February 15, 2016. The table has columns for time, event name, and location. Below the table are navigation buttons: Day, Month, Date, Previous, Today, Next. A red box highlights the 'check in', 'cancel', and 'end now' buttons for each row.

1. Click **My Events** to see your reservations and bookings. The default view for My Events is dependent on the configuration done by your EMS Administrator. This configuration is done in the EMS Desktop Client through the **My Events Default View** parameter. See Also: [EMS Everyday User Applications Parameters](#).
2. To view or edit a reservation, click the name of the reservation. See Also: [Create a Reservation in the EMS Web App](#).

My Events ? Ryan Wall

RESERVATIONS **BOOKINGS** 1 See your bookings 2 Search by event name or ID

Include cancelled reservations

CURRENT **PAST** 3 Click on an event name to see details

Name	First/Last Booking ^	Location	Services	ID	Status
Test Event (TT) 240 month recurrence	Sun Jun 1, 2008/ Mon May 1, 2028 (multi-booking)	Multiple		3609	Confirmed
Test Event RR	Wed Apr 6, 2016/ Fri May 13, 2016 (multi-booking)	Multiple	✓	27194	Web Request
Exchange Event	Fri May 13, 2016/ Fri May 13, 2016 (multi-booking)	Multiple		27995	Web Reservation



Note:

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.



Note:

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 the reservations you have created. It will not display reservations to which you have been invited.

- 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.

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)

Reservation Tasks

- Booking Tools
- Cancel Reservation
- View Service Availability
- Send Invitation
- Add to My Calendar

Bookings

CURRENT PAST

Include cancelled bookings

[New Booking](#)

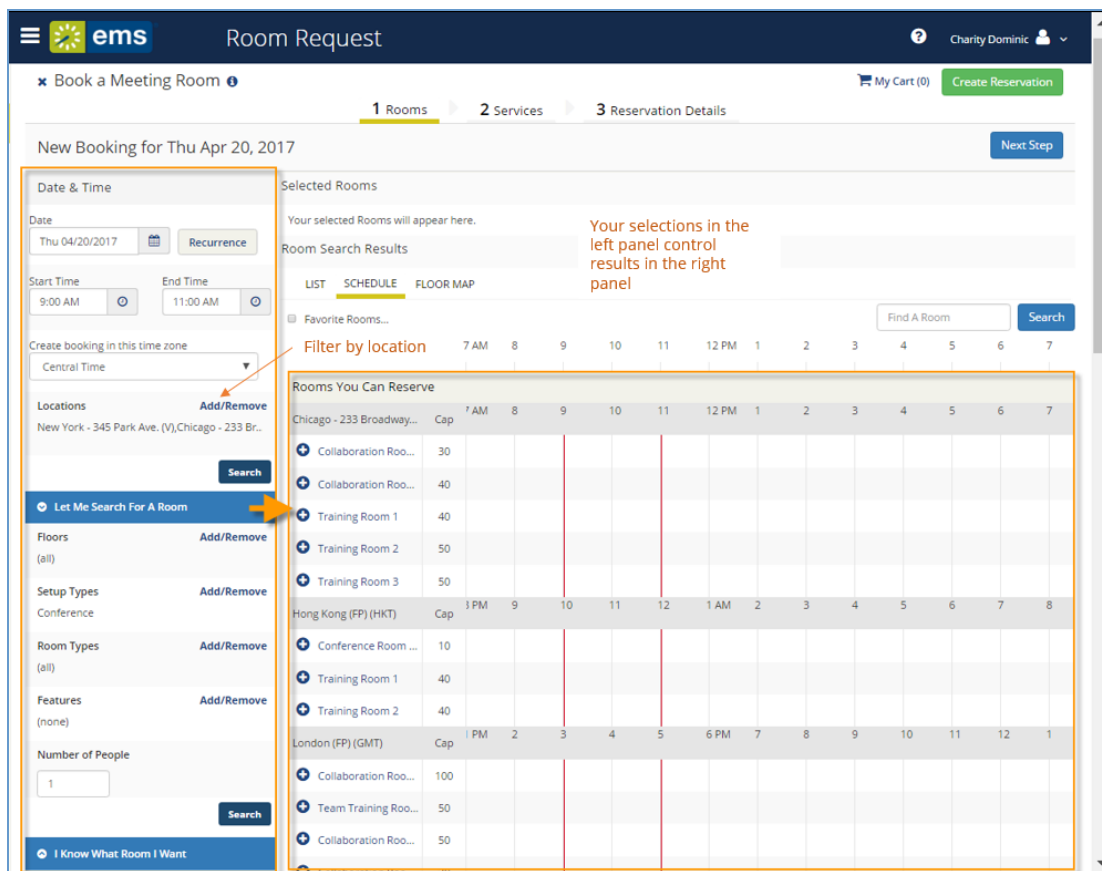
Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 12, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 19, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 26, 2016	12:00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

CHAPTER 66: Search for Available Rooms

During the booking process, you can search for available rooms on the Room Request page in two ways: **Let Me Search For A Room** or **I Know What Room I Want**.

To search for available rooms, do the following:

1. From the Create a Reservation screen, in the Bookings area, select one of the following:
 - **Let Me Search For A Room**
OR
 - **I Know What Room I Want**



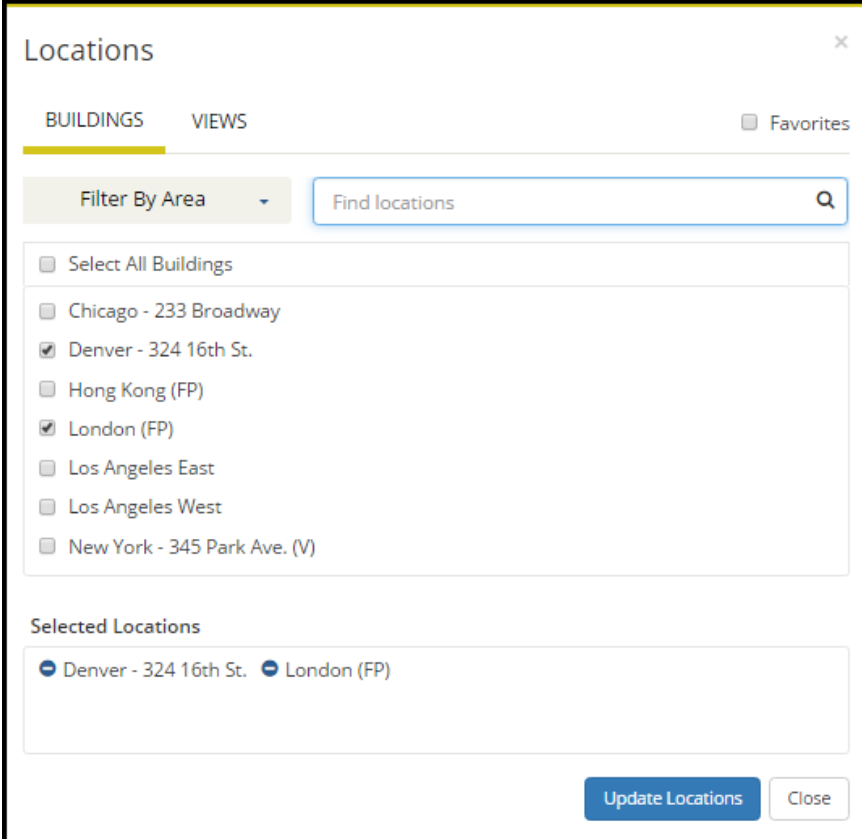
**Note:**

Filters in the 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, and you can view any available floor plans by clicking the floor plan icon next to it.

You can click the Add/Remove buttons next to Locations, Floors, Setup Types, and Features to add or expand your filters. To set Favorite Rooms to use every time, see [Set Favorite Rooms](#).

Locating space as part of the reservation process is different than browsing locations. For detailed instructions on using the BROWSE LOCATIONS option in the main menu to view available and booked space, see [Browse Locations](#).

2. To filter your search by Location, click **Add/Remove** next to **Location**. This presents a list of locations by Building or view. Select the locations filters you want to apply (or search by keyword), and then click **Update Locations**. This filters the results of your keyword search on the Add New Favorite Room dialog (above). Your filter settings are saved, and you will have to go back in and remove them if you want to expand search results beyond these locations.



Locations

BUILDINGS VIEWS Favorites

Filter By Area Find locations

Select All Buildings

Chicago - 233 Broadway

Denver - 324 16th St.

Hong Kong (FP)

London (FP)

Los Angeles East

Los Angeles West

New York - 345 Park Ave. (V)

Selected Locations

Denver - 324 16th St. London (FP)

Update Locations Close

- 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.

CHAPTER 67: Book Multiple Rooms

During the [reservation process](#), you can select more than one room (if the template you are using permits it).

- Once you have [found available rooms](#), click the **Add (+)** icon to move each room into the Selected Rooms area. You can repeat this for each room you want to add to your reservation.

1 Rooms & Attendees ▶ 2 Services ▶ 3 Reservation Details

My Cart (4) Create Reservation

Next Step

Selected Rooms Attendance & Setup Type

Conference Room 1 Collaboration Room 2 Innovation Lab 2 Conference Room 3

Attendees

There was a problem accessing the Attendee services.

Room Search Results

LIST SCHEDULE FLOOR MAP

Favorite Rooms only. Find A Room Search

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

- As you book each room, EMS will prompt you to enter attendees and setup type as follows:
 - Enter the headcount in the **No. of Attendees** field.
 - Select a setup type from the **Setup Type** dropdown list.
 - Click the **Add Room** button to book the room.

The screenshot shows a dialog box titled "Attendance & Setup Type" with a close button (X) in the top right corner. Below the title is the instruction: "To continue, please enter the number of attendees and desired setup type for this Room." There are two main input sections: "No. of Attendees" and "Setup Type".

- No. of Attendees:** A text input field containing the number "1". A callout "1" with an arrow points to this field, labeled "Enter headcount".
- Setup Type:** A dropdown menu currently showing "Conference". A callout "2" with an arrow points to the dropdown arrow, labeled "Pick a setup type".
- Buttons:** At the bottom right, there are two buttons: "Add Room" (highlighted with a blue glow) and "Cancel". A callout "3" with an arrow points to the "Add Room" button, labeled "Book the room".

3. Click **Next Step** to continue with the booking process.

CHAPTER 68: Book Recurring Meetings

This topic provides information on booking recurring meetings in the EMS Web App.

- [Create a Reservation for Recurring Meetings](#)
 - [Specify When and Where](#)
 - [Specify Who and What](#)
 - [Choose Services \(Optional\)](#)
 - [EMS for Outlook® \(Optional Capability\)](#)
 - [Finalize Reservation Details](#)



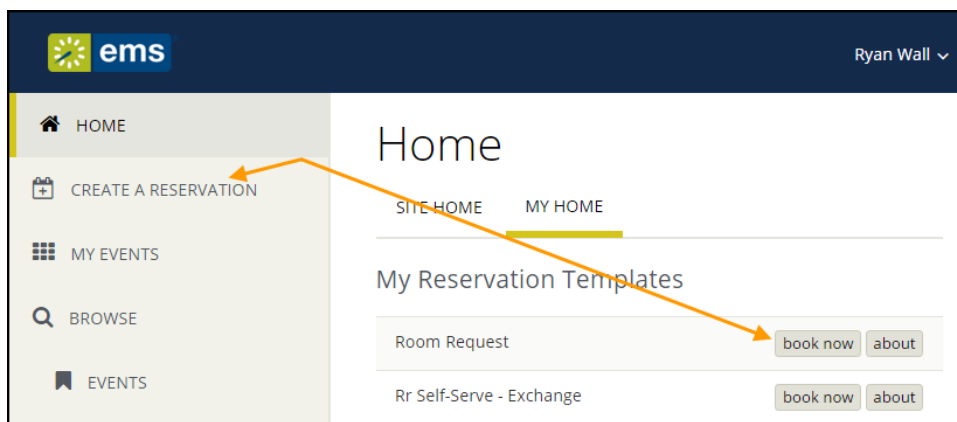
Note:

For a conceptual overview, be sure to review the following topics:

- [Ways to Make Reservations](#)
- [Reservations, Bookings, and Booking Details](#)

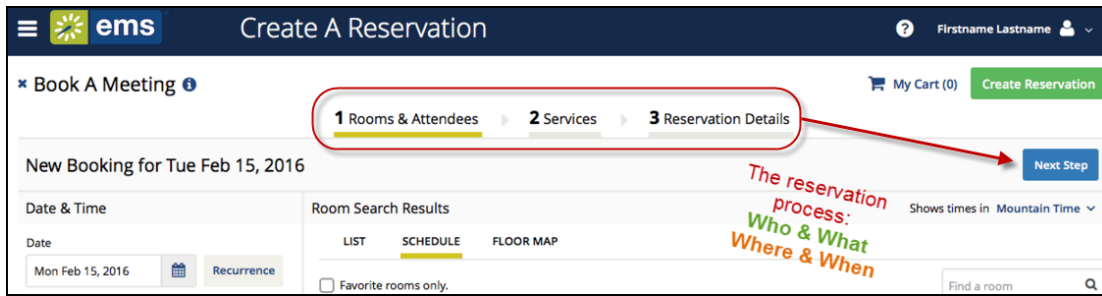
Create a Reservation for Recurring Meetings

1. 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).



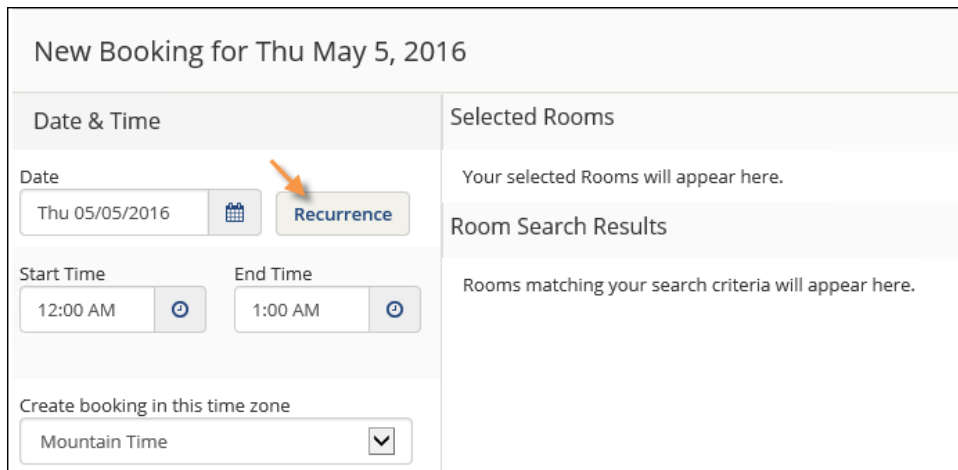
2. Next, the Create a Reservation screen launches, where EMS Web App will lead you through the reservation process.
3. Enter your information (including all required fields) and click the **Next Step** button to advance

through the process.



Specify When and Where

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



- a. Follow the prompts to select the frequency, date range, day of the week, start and end times, and time zone for the recurrence.

Recurrence ×

Repeats Daily ▼ Remove Recurrence

Every day(s)

Weekdays Only

Start Date 📅

End Date 📅 (2 occurrences)

End after occurrence(s)

Start Time End Time

🕒 🕒

Create Booking In ▼

Apply Recurrence Close

- b. Click **Apply Recurrence** to validate your entries and return to the New Booking screen.



Note:

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 might differ from your system time zone.

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

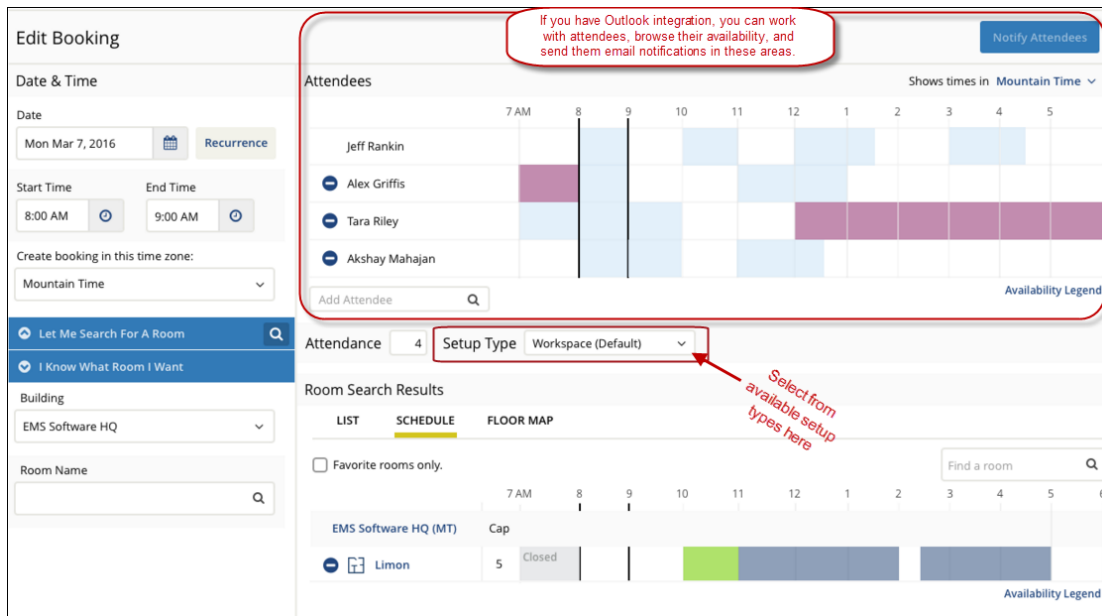
Note: Filters in this lower left panel help you narrow your Room Search Results. When you click Search, results appear on the right. From these results, you can view expanded Room Details by clicking on the room name.

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 [Search for Available 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 and 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.

**Note:**

Adding attendees to an event is different than browsing people. For detailed instructions on using the **BROWSE PEOPLE** option from the main menu, see [Locate People](#).

3. Once you have completed all required fields, click **Next Step** in the upper right corner.

Choose Services (Optional)

This is an optional feature based on the booking template you use. Services include room setup and teardown, equipment, and any other services you want 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 want to associate with the reservation, or click **Skip Services**.
2. When complete, click **Next Step** in the upper-right corner.

EMS for Outlook® (Optional Capability)

EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS add-in icon in your Outlook application. You will also see additional features and functionality in EMS. Furthermore, 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.

Finalize Reservation Details

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to all attendees.

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

**Note:**

To add the reservation to your Outlook calendar, click the **Add this reservation to my calendar** checkbox at the bottom of the window.

CHAPTER 69: Book 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.

**Note:**

You might 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.

CHAPTER 70: Book a Desk or Workspace in the EMS Web App

This topic provides information on booking a desk or workspace in the EMS Web App.

- [Create a Reservation for a Desk or Workspace](#)
 - [Specify When and Where](#)
 - [Specify Who and What](#)
 - [EMS for Outlook \(Optional Capability\)](#)
 - [Finalize Reservation Details](#)



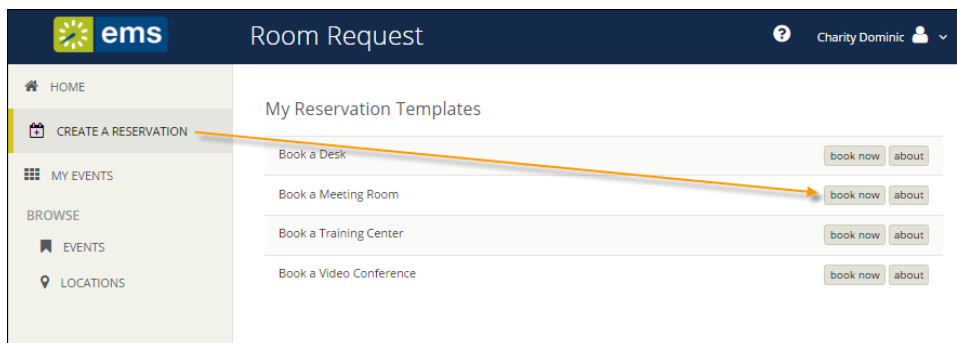
Note:

For a conceptual overview, be sure to review:

- [Ways to Make Reservations](#)
- [Reservations, Bookings, and Booking Details](#)

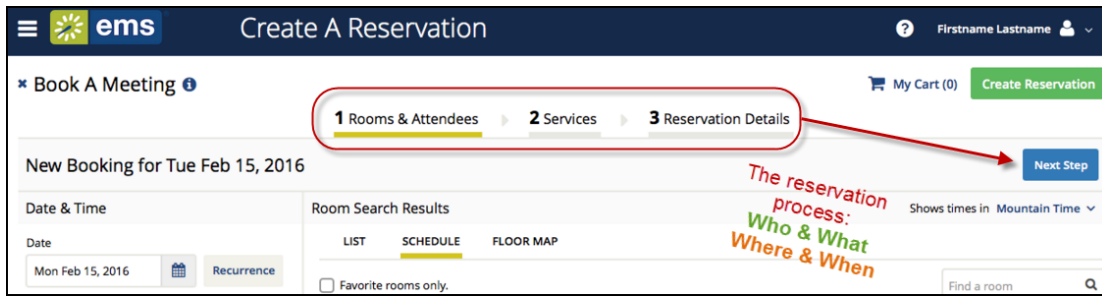
Create a Reservation for a Desk or Workspace

1. 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).



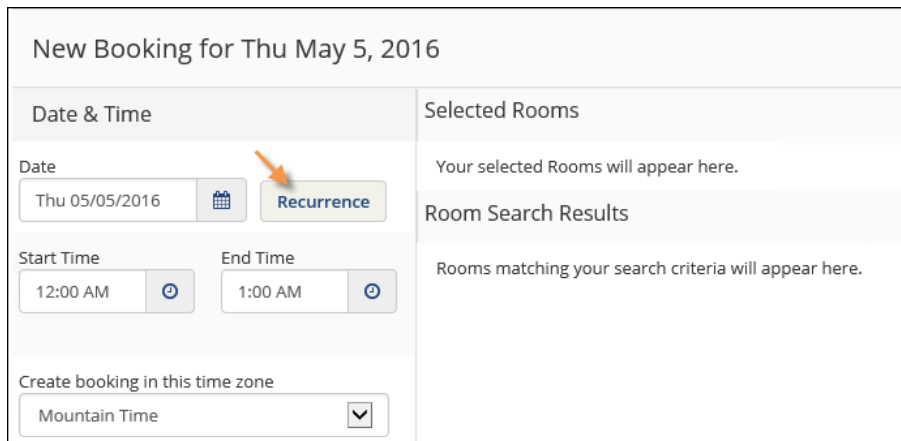
2. Next, the Create a Reservation screen launches, where EMS Web App will lead you through the reservation process.
3. Enter your information (including all required fields) and click the **Next Step** button to advance

through the process.



Specify When and Where

1. To specify *When*, select dates and times.
 - a. If you want to book space for multiple time slots, click the **Recurrence** button.



- b. 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 day(s)

Weekdays Only

Start Date 📅

End Date 📅 (2 occurrences)

End after occurrence(s)

Start Time End Time

🕒 🕒

Create Booking In ▼

Apply Recurrence Close

- c. Click **Apply Recurrence** to validate your entries and return to the New Booking screen.



Note:

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 might differ from your system time zone.

2. To specify *Where*, in lower left panel, select one of the following:
- **Let Me Search For A Room**
 - OR
 - **I Know What Room I Want**

Note: Filters in this lower left panel help you narrow your 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.

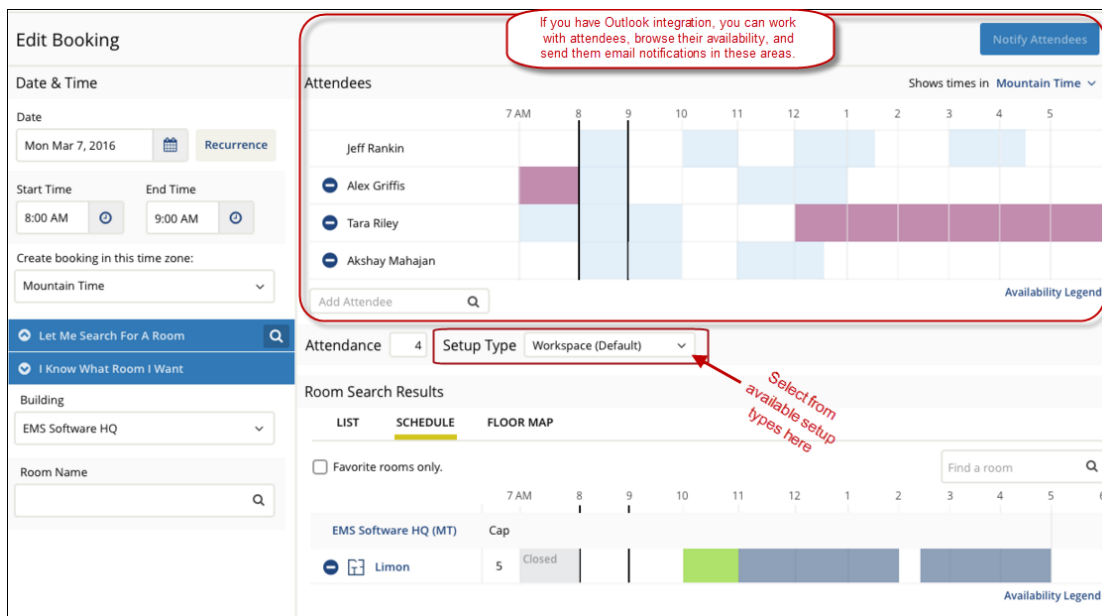
Locating space as part of the reservation process is different than simply browsing locations. For detailed instructions on using the **BROWSE LOCATIONS** option on the main menu to see available and booked space, see [Browse Locations](#).

3. Once you have located space 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 and What

To specify the setup type and attendees for your reservation, do the following:

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



2. Specify headcount and attendees in the Attendance area. If you are the only attendee, you might be able to skip this step.
 - 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.
3. Once you have completed all required fields, click **Next Step** in the upper right corner.

EMS for Outlook® (Optional Capability)

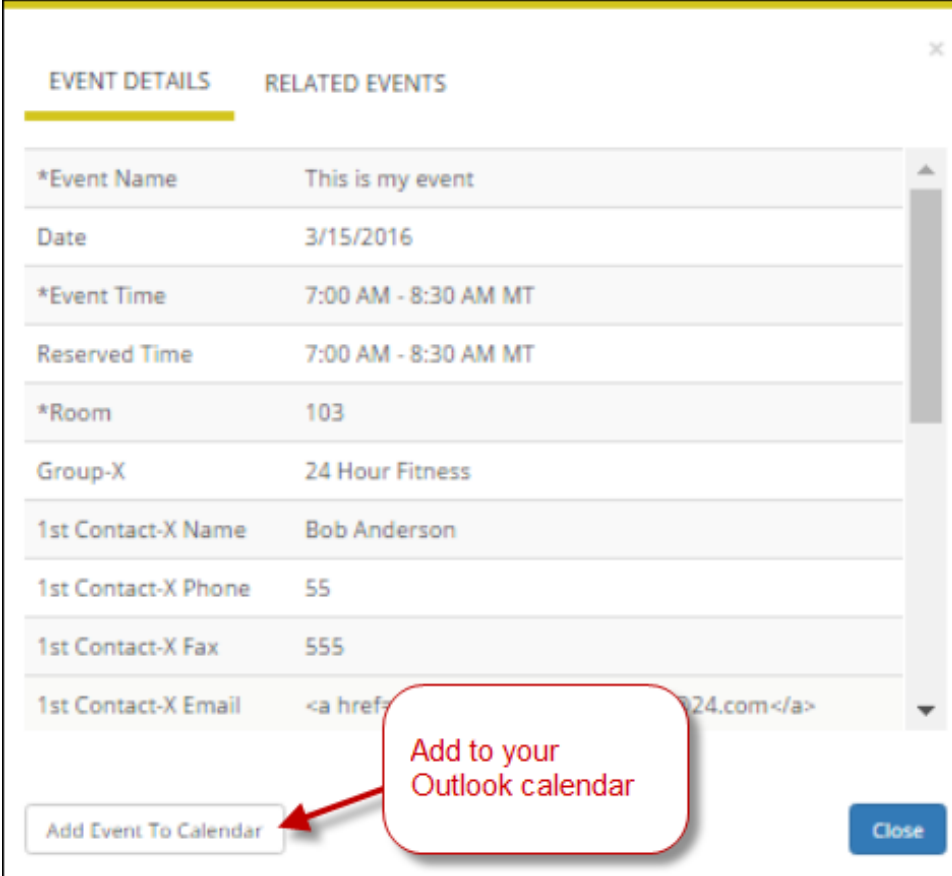
EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS plug-in icon in your Outlook application. You will also see additional features and functionality in EMS. Further, anywhere that you see people or groups in EMS, you will have access 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.

See Also: [Checking In](#)

Finalize Reservation Details

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to any attendee you invites. The example shown below might differ from your implementation.

1. 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	

Add to your Outlook calendar

Add Event To Calendar Close

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

**Note:**

To add the reservation to your Outlook calendar, click **Add Event To Calendar** at the bottom of the window.

CHAPTER 71: Add 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. This topic provides information about the following:

- [Reservation Details](#)
- [Reservation vs. Booking](#)
 - [Reservations: Who and What](#)
 - [Bookings: Where and When](#)
 - [Booking Details](#)
 - [Service Orders](#)
- [Reservation Tasks](#)
- [Attachments](#)
- [Bookings for the Reservation](#)

Reservation Details

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 displays the EMS 'My Events' interface for a 'Workout' event. The 'RESERVATION DETAILS' section shows event information like 'Event Name: Workout', 'Event Type: Recreation', and 'Group: Charity Dominic'. The 'Bookings' section is active, showing a table of current bookings. Annotations include: '2 Work with the reservation' pointing to the 'Edit Reservation Details' button; '2 Work with a booking' pointing to the 'Cancel Bookings' link; '3 See room details' pointing to a location cell in the table; and '4 Add another booking to this reservation' pointing to the 'New Booking' button.

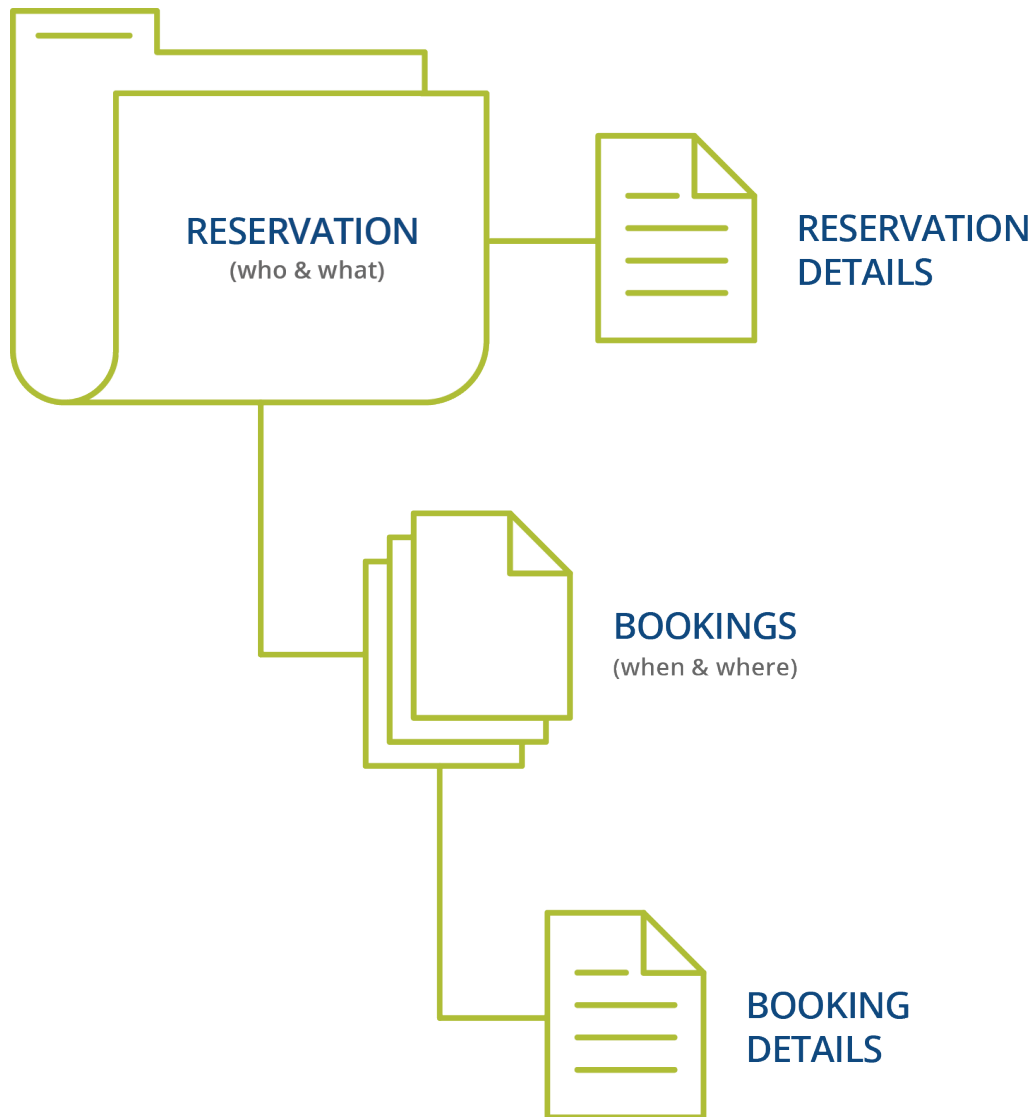
Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 12, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 19, 2016	12:00 PM	1:00 PM	MT	Taylor Field House - Gymnasium - All	16	As Is/Standard	Web Request
Thu May 26, 2016	12:00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

Reservation vs. Booking

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

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

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



Reservations: Who and What

A *reservation* is the "who and what" of an event. For example, the Academic Planning Board (the who) can 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 for more...*
In EMS, you might 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 *Category types*: Activities, Attendees, Catering, Notes, Resources with Service Orders, or Resources Without Service Orders. These types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it, and there is nothing for a person to "select" from these types of services.

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



Note:

The following Category Types allow [Production Items](#): Catering, Resources with Service Orders, and Resources Without Service Orders.

Furthermore, a Category can be [configured to "Use States"](#) so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option in EMS Desktop Client.



See Also: [Add Booking Details Wizard](#)

**Note:**

You might be able to see floorplans for rooms. See Also: [View Floor Plans](#).

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.
View Service Availability	Opens a Service Availability window where you can choose from allowable booking templates to add services.
Send Invitation	Sends invitations to recipients you specify.
Add to my Calendar	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
Cancel Booking 	Cancel selected bookings for the reservation.

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

CHAPTER 72: Add Services to a Meeting

To add services to an existing event, follow these steps:

1. Click on **My Events** and open the reservation you want to edit.
2. Click **Add Services** to add details to the meeting.

The **Add Services** option is only available if your Administrator allows services for this type of meeting and for your user profile.

The screenshot shows the EMS 'My Events' interface. The top navigation bar includes the EMS logo, the title 'My Events', and a user profile for 'Charity'. The main content area is titled 'My Events / Meeting about music beginning Mar 17, 2017 (2824823)'. It features two tabs: 'RESERVATION DETAILS' (active) and 'ATTACHMENTS'. Under 'RESERVATION DETAILS', there is an 'Edit Reservation Details' link and a table with the following information:

Event Name	Meeting about music
Event Type	Client
Group	Carney, Lisa
1st Contact Name	Charity
--

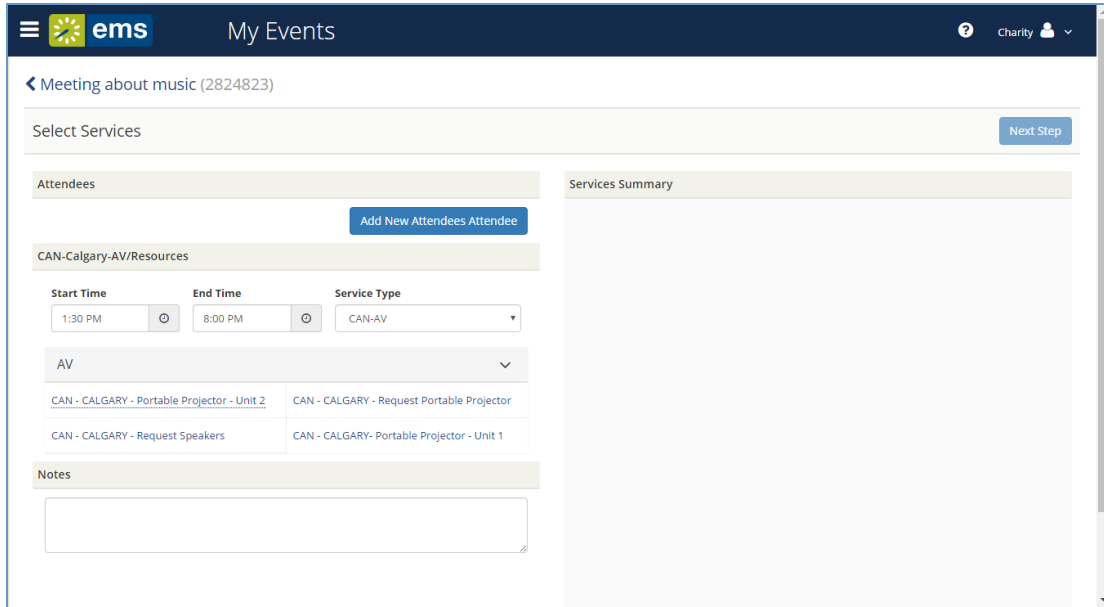
To the right of this table is a 'Reservation Tasks' sidebar with the following options: 'Add Services', 'Cancel Services', 'Booking Tools', 'Cancel Reservation', 'View Reservation Summary', 'View Service Availability', 'Send Invitation', and 'Add to My Calendar'. An orange arrow points to the 'Add Services' button. Below the reservation details is a 'Bookings' section with 'CURRENT' and 'PAST' tabs. A checkbox for 'Include cancelled bookings' is present. There are 'Cancel Bookings' and 'Booking Tools' links, and a 'New Booking' button. A table lists the following booking:

Date ^	Start Time	End Time	Time Zone	Location	Status
Fri Mar 17, 2017	1:30 PM	8:00 PM	CT	Bentonville - Beau Terre Office Park - 11 Training Room 20 person	Confirmed

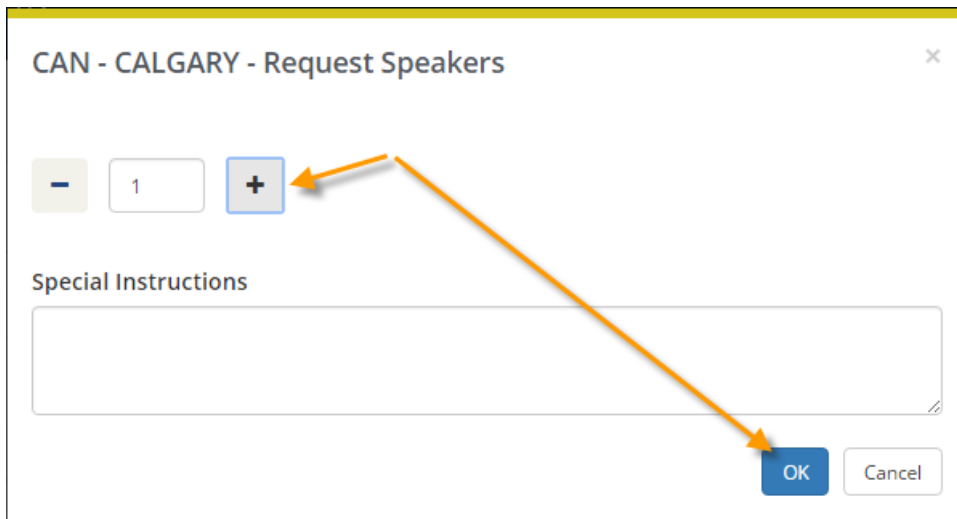
At the bottom, there is a warning message: 'Warning: Booking in conflict status or had a resource quantity reset' with links to 'View Services' and 'Manage Services'. Another orange arrow points to the 'View Services' link.

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

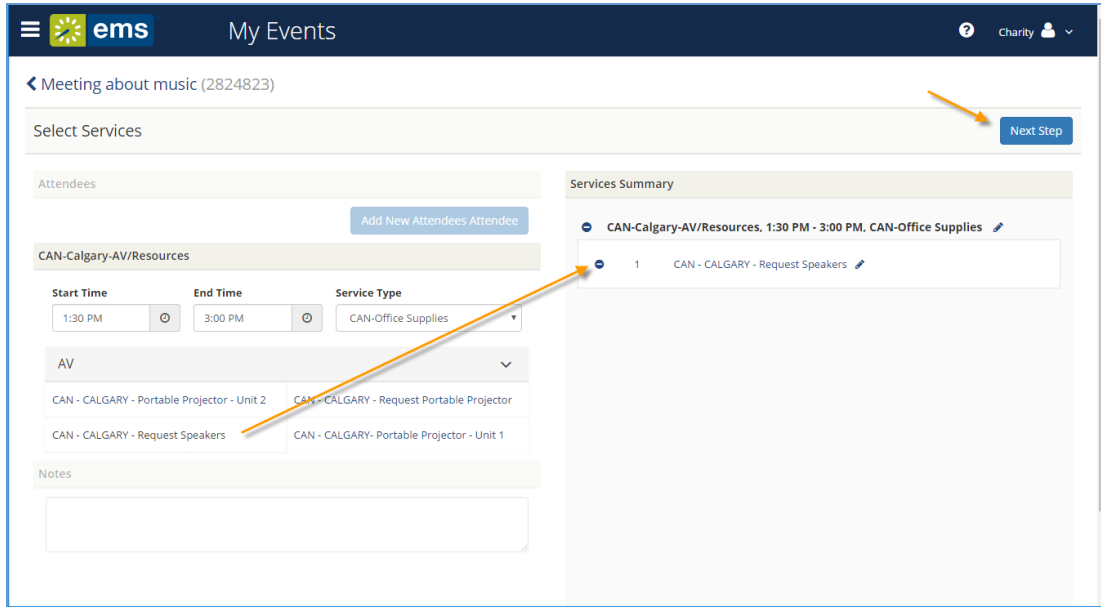
3. The first screen shows attendees and any existing services for the meeting and click on services you want to add from the list of available options.



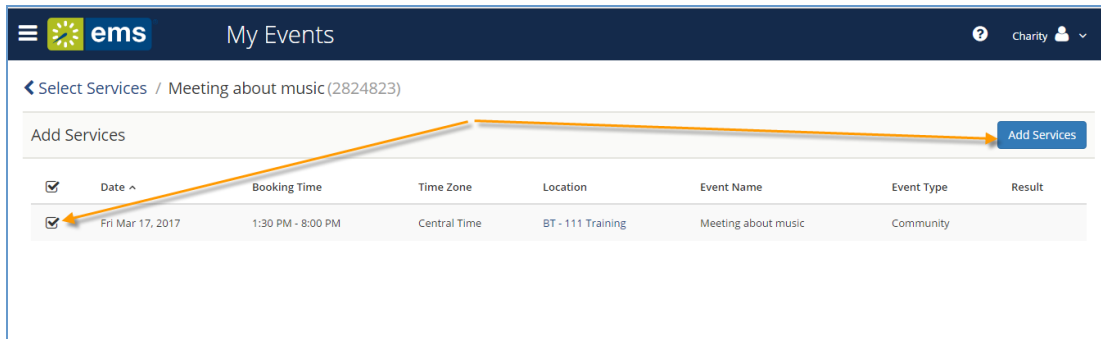
- When you click on a service to add, a pop-up screen might prompt you to specify a quantity for the item and prompt you to add notes, special instructions, and so on. Click **OK** to save your changes.



- 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 want to add services (if the reservation includes multiple booking, they are all listed here for you to select), and click the **Add Services** button.



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

CHAPTER 73: Work with Services

This topic provides information on the following:

- [Services, Categories, and Resources](#)
- [Add Services to a New Reservation](#)
- [Change or Cancel Services for an Existing Reservation](#)

Services, Categories, and Resources

In EMS, you may sometimes hear the terms Services, Categories, and Resources used interchangeably; however, they are different concepts.

Categories

A Category in EMS is anything you might add to a Booking such as Catering, Audio Visual, Furniture, Security, Notes, Attendee Names, Agendas etc. When you configure a Category, however, it must be of six Category types: Activities, Attendees, Catering, Notes, Resources with Service Orders, or Resources Without Service Orders. These types cause the service to behave slightly differently when added to a booking. For example, a Notes/Activities/Attendees type service category does not require the EMS Administrator to configure items under it and there is nothing for a person to “select” from these types of services.

Service Category

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 or whiteboard (under AV Equipment). The person requesting the service for this meeting would then select **AV equipment**; then flipchart and whiteboard would be typical options to add to the event.

**Note:**

The following Category Types allow [Production Items](#): Catering, Resources with Service Orders, and Resources Without Service Orders.

Furthermore, a Category can be [configured to "Use States"](#) so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option in EMS Desktop Client.



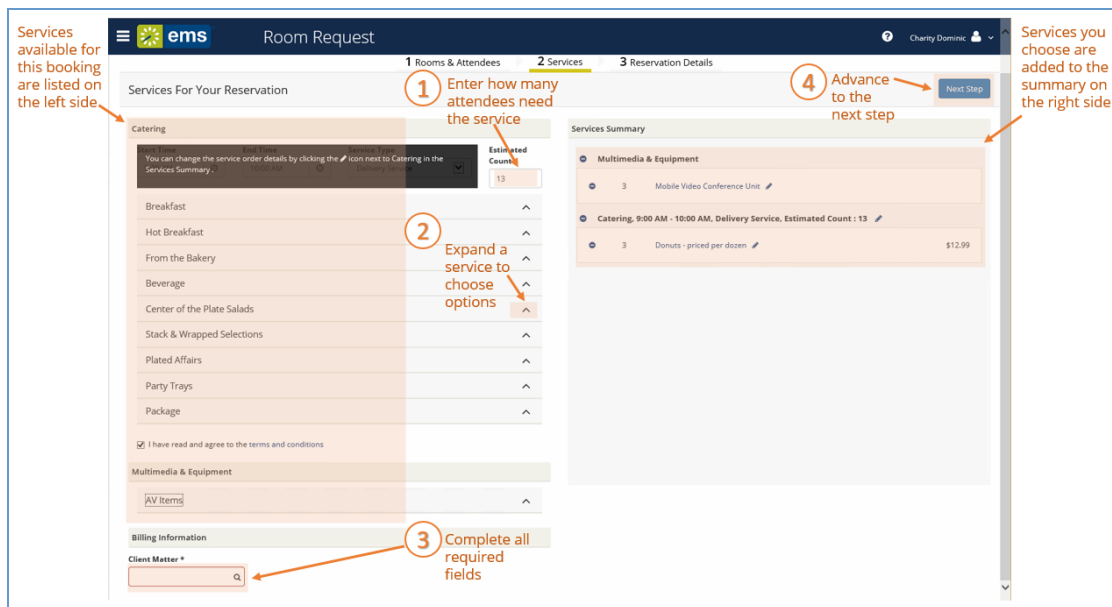
Note: If you are using the EMS Web App on a mobile device, you will not have access to this feature. See Also: [Categories, Resources, and Services: What's the Difference?](#)

Add Services to a New Reservation

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.

Note: 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** dropdown 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.



**Note:**

Options available in the Services drop-down field 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.

**Note:**

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.

Change or Cancel 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.

My Events / Meeting about music beginning Mar 17, 2017 (2824823)

RESERVATION DETAILS ATTACHMENTS

Event Name: Meeting about music
 Event Type: Client
 Group: Carney, Lisa
 1st Contact Name: Charity

Reservation Tasks:
 Add Services
 Cancel Services
 Booking Tools
 Cancel Reservation
 View Reservation Summary
 View Service Availability
 Send Invitation
 Add to My Calendar

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools [New Booking](#)

Date	Start Time	End Time	Time Zone	Location	Status
Fri Mar 17, 2017	1:30 PM	8:00 PM	CT	Bentonville - Beau Terre Office Park - 11 Training Room 20 person	Confirmed

Warning: Booking in conflict status or had a resource quantity reset [View Services](#) | [Manage Services](#)

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.

Meeting about music (2824823)

Manage Services [Reservation Details](#)

Attendees

Name	Company N...	Email Addr...	Phone	Visitor
devin		devin@com...		<input type="checkbox"/>

[Add New Attendees Attendee](#)

CAN-Calgary-AV/Resources

Start Time: 1:30 PM End Time: 8:00 PM Service Type: CAN-AV

AV

CAN-Calgary-AV/Resources (2)

Start Time: 1:30 PM End Time: 3:00 PM Service Type: CAN-Office Supplies

AV

Notes

Very important! Make sure to plug in the speakers.

[Save Changes](#) [Cancel](#)

Services Summary

- CAN-Calgary-AV/Resources, 1:30 PM - 8:00 PM, CAN-AV
 - 1 CAN - CALGARY - Request Portable Projector \$ 0.00
 - 0 CAN - CALGARY - Request Speakers \$ 0.00
 - 1 CAN - CALGARY - Request Portable Projector \$ 0.00
 - 1 CAN - CALGARY - Portable Projector - Unit 1 \$ 0.00
 - 1 CAN - CALGARY - Portable Projector - Unit 2 \$ 0.00
- CAN-Calgary-AV/Resources (2), 1:30 PM - 3:00 PM, CAN-Office Supplies
 - 0 CAN - CALGARY - Request Speakers \$ 0.00



Note:

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

CHAPTER 74: Cancel Your Reservations and Bookings

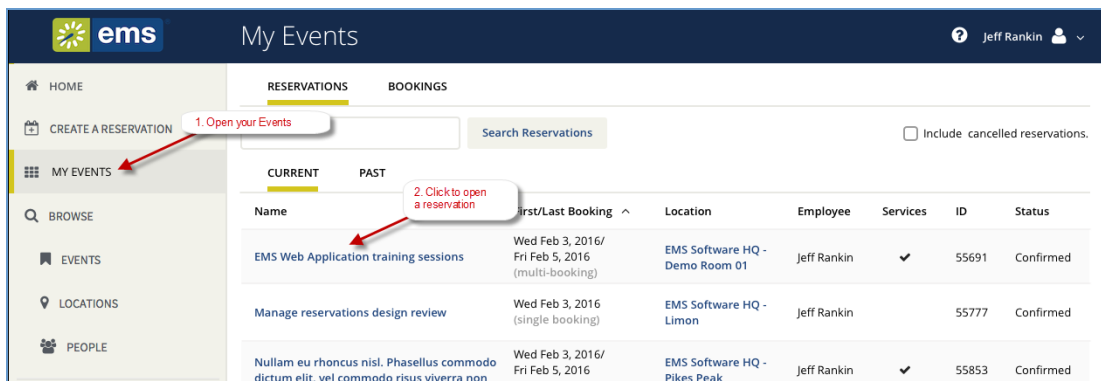
This section guides you to work with bookings in the Reservation Details page on EMS Web App, where you can view, add, change, or cancel services and attendees for a booking. For an overview, see [Add Reservation Details](#). A reservation might contain multiple bookings, so the procedures below guide you in applying your changes to more than one booking within a reservation.

This topic provides information on the following:

- [Cancel Reservations](#)
- [Cancel Bookings](#)

Cancel Reservations

1. Navigate to the reservation with which you want 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.



Note: 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.

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

The screenshot shows the 'My Events' interface. At the top, there's a navigation bar with the 'ems' logo and 'My Events' title. Below that, the breadcrumb path is 'My Events / Exchange Event beginning Apr 29, 2016 (27768)'. There are two tabs: 'RESERVATION DETAILS' (active) and 'ATTACHMENTS'. Under 'RESERVATION DETAILS', there's an 'Edit Reservation Details' link and a table with the following information:

*Event Name	Exchange Event
*Event Type	Class
Group	Ryan Wall
1st ContactX Name	Main Man

Below this is a 'Bookings' section with 'CURRENT' and 'PAST' tabs. A checkbox for 'Include cancelled bookings' is present. A table lists the booking details:

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Sat Apr 30, 2016	7:00 AM	10:00 AM	MT	Denver Desc - Twelve	10	Banquet	Web Reservation

On the right side, a 'Reservation Tasks' sidebar is open, containing the following options: 'Manage Attendees', 'Cancel Reservation' (highlighted with a red arrow), 'View Reservation Summary', 'Send Invitation', and 'Add to My Calendar'.

Important! Canceling a reservation will also cancel all bookings under the reservation.

- In the **Cancel Reservation** popup that appears, select a **Cancel Reason**, add **Cancel Notes**, and then confirm that you want to cancel.

Cancel Reservation?

Both the reservation and bookings will be cancelled. Are you sure you want to proceed?

Cancel Reason

Cancel Notes

4. Your MY EVENTS pages refreshes, and the reservation is canceled.

Cancel Bookings

1. From the [Reservation Details](#) page in the Bookings 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.

The screenshot shows the 'My Events' page in the EMS system. The breadcrumb trail is 'My Events / Exchange Event beginning Apr 29, 2016 (27768)'. There are two tabs: 'RESERVATION DETAILS' (selected) and 'ATTACHMENTS'. Under 'RESERVATION DETAILS', there is an 'Edit Reservation Details' link and a table with the following information:

*Event Name	Exchange Event
*Event Type	Class
Group	Ryan Wall
1st ContactX Name	Main Man

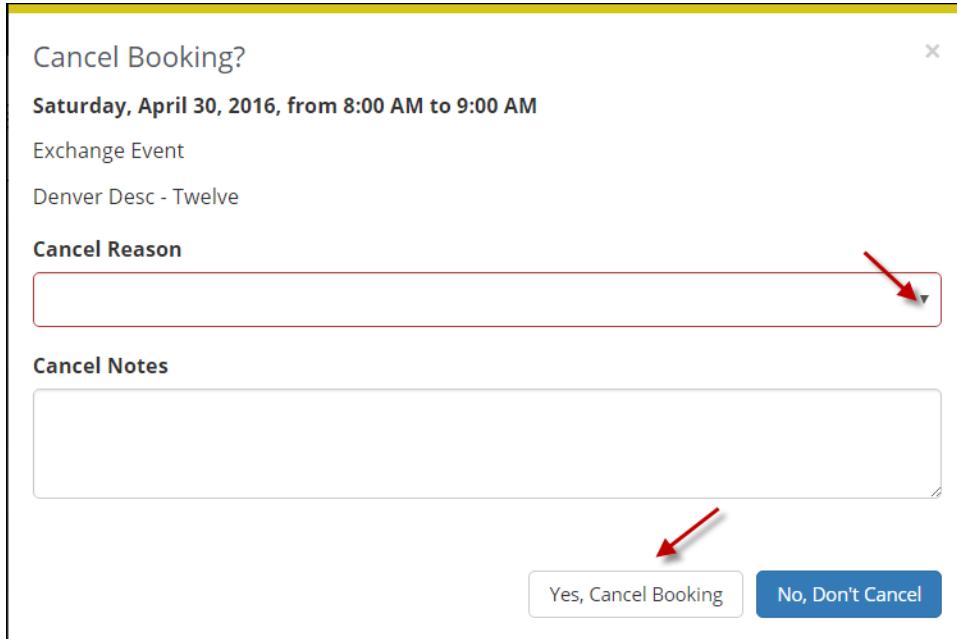
On the right side, there is a 'Reservation Tasks' panel with the following options: 'Manage Attendees', 'Cancel Reservation' (with a minus icon), 'View Reservation Summary', 'Send Invitation', and 'Add to My Calendar'. Below this is a 'Bookings' section with tabs for 'CURRENT' (selected) and 'PAST'. There is a checkbox for 'Include cancelled bookings'. A table lists the current bookings:

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Sat Apr 30, 2016	7:00 AM	10:00 AM	MT	Denver Desc - Twelve	10	Banquet	Web Reservation

A red arrow points to the minus icon next to the date 'Sat Apr 30, 2016' in the bookings table.

Note:
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**, add **Cancel Notes**, and then confirm that you want to cancel.



3. Your MY EVENTS page refreshes and the booking is canceled.

CHAPTER 75: Edit 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 [Add 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.

The process for editing reservations and bookings for Exchange-enabled templates and non-Exchange-enabled templates are different. This topic includes the following information:

- [Edit Reservations](#)
- [Edit Booking \(Exchange-enabled Template\)](#)
- [Edit Bookings \(Non-Exchange-enabled Template\)](#)

Edit Reservations

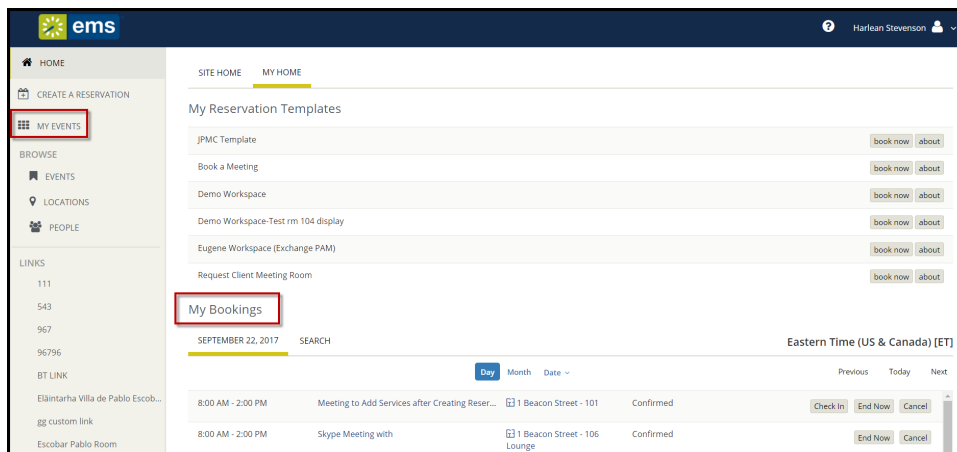
Concept: Reservations and Bookings: What Is the Difference? *(Click to Expand)*

A Reservation is the purpose of the event. In EMS, a reservation is the who (the meeting organizer) and the what of an event. A Reservation contains one or more Bookings. For example, you (the who) can reserve some space for a staff meeting (the what).

A Booking is the where and the when of an event. For example, you can schedule the large auditorium (the where) for a staff meeting on the second Monday in January (the when). There are one or more Bookings in a Reservation.

To edit a reservation:

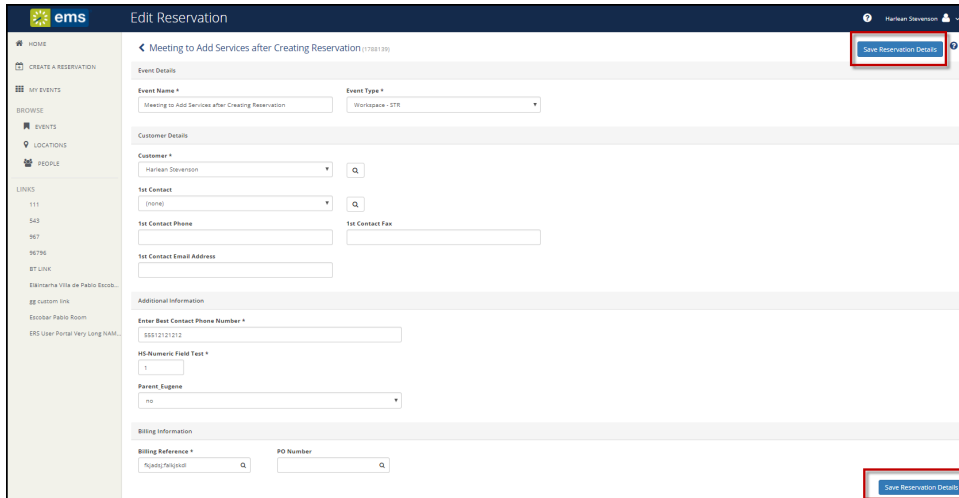
1. To navigate to the reservation you want to edit, click **My Events** on the side bar of the Home page.



Use the My Events Link to Find Your Reservations

2. Click on the reservation name you want to edit.

- To edit reservation details, navigate to [Reservation Details](#) > **Reservation Details** tab.
- Click the **Edit Reservation Details** link.



Edit Reservation Details Page

- Edit any available field.
- Click the **Save Reservation Details** buttons at either the bottom or top right hand of the page.

Note: 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.

Note: If there is Additional Information (e.g., user-defined fields) associated with your reservation, you can edit this information by navigating to the Additional Information Tab from the Reservation Details page. Click the **Edit Additional Information** button.

Edit Booking (Exchange-enabled Template)

Important! Users are unable to edit the date and time from the **Room Request** screen. The date and time can be edited from the **Manage Bookings** screen.

1. From the Home page, navigate to the **My Events** page.
2. Click on the Reservation Name for the reservation you want to edit.
3. Click **Edit** icon next to the booking you want to edit. The **Manage Bookings** page appears.
4. From the **Manage Bookings** page, you can:
 - I. **Edit/replace the room:**
 - a. Click on the **Edit** icon next to the room to change the location. The user is routed to the **Room Request** screen.
 - b. Click **Search** to display the list of available rooms.

**Note:**

In the example below, Demo Room 03 does not have an **Add (+)** button because it was the original room for this booking.

Room Request Screen

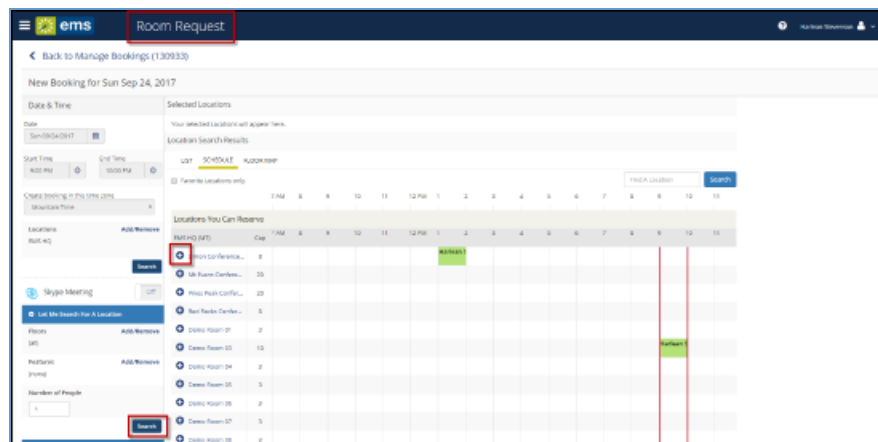
- c. To choose a room, click the **Add (+)** button.
- d. Click **Update Booking** to save that location to your booking.
- e. When the Manage Bookings screen appears, click **Update Bookings** again on this page.
- f. You will receive a prompt to **Notify Attendees**. Click either **Notify Change** (this will send a calendar update to added or removed attendees), **Notify All** (this will send a calendar update to ALL attendees), or **Cancel**.
- g. Changes are applied, attendees are notified, and the calendars of both attendees and the organizer are updated.

II. Edit the time/date of the booking:

- Click on the reservation Name for the reservation you want to edit.
- Click **Edit** icon next to the booking you want to edit. The Manage Bookings page appears.
- Edit the **Date & Time** of the booking in the left-hand column.
- If the room is available for this new time, click **Update Bookings**.
- If the room is not available for the new time, either select a new time or edit the room for the booking (see above).

III. Add an additional location to the same booking:

- Click on the reservation name for the reservation you want to edit.
- Click **Edit** icon next to the booking you want to edit. The **Manage Bookings** page appears.
- Click **Add Location**. The Room Request screen appears.



Add Additional Location



Note:

All locations within the same booking will have the same Start and End time.

- Click **Search** to display the list of available rooms.
- Select a room(s) using the **Add (+)** button.
- Click **Done**. The Manage Bookings page appears.
- Click **Update Bookings**.

- h. A prompt will appear to **Notify Attendees**. Click either **Notify Change** (this will send a calendar update to added or removed attendees), **Notify All** (this will send a calendar update to ALL attendees), or **Cancel**.
- i. Changes are applied, attendees are notified, and the calendars of both attendees and the organizer are updated.

IV. **Modify attendees in this booking:**

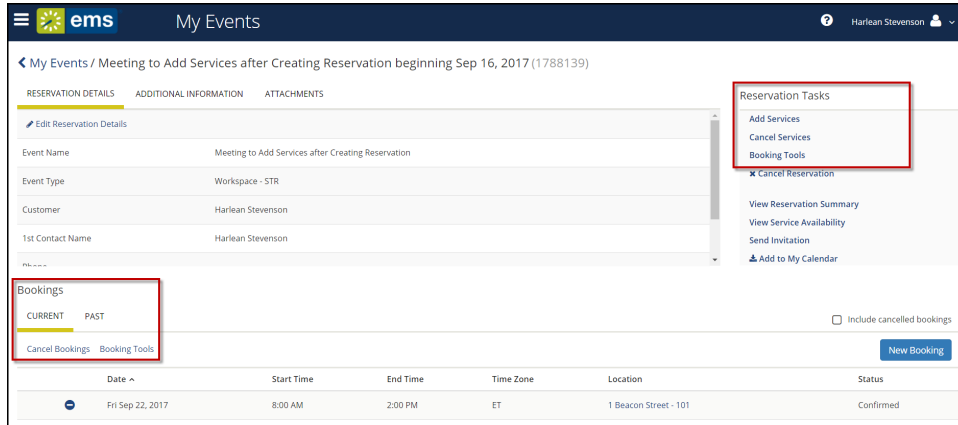
- a. Click on the reservation Name for the reservation you want to edit.
- b. Click the **Edit** icon next to the booking you want to edit. The Manage Bookings page appears.
- c. Navigate to the **Attendee** section.
- d. Type in the attendee name in the text field. The system will create a dropdown list of names that match the search.
- e. Select a name. This attendee will be added to your booking.
- f. Click **Update Subject/Message and Notify Attendees**.
- g. Click either **Notify Change** (this will send a calendar update to added or removed attendees), **Notify All** (this will send a calendar update to ALL attendees), or **Cancel**.
- h. Changes are applied, attendees are notified, and the calendars of both attendees and the organizer are updated.

Edit Bookings (Non-Exchange-enabled Template)

From the [Reservation Details](#) page in the Bookings area, you can edit one booking or multiple bookings.

Edit the Date and Time on a Single or on Multiple Bookings

1. Click the Booking Tools link under the **Reservation Tasks** section on the right hand side of this page. You can also edit the date and time on multiple bookings by clicking on the Booking Tools link under the **Bookings** section.

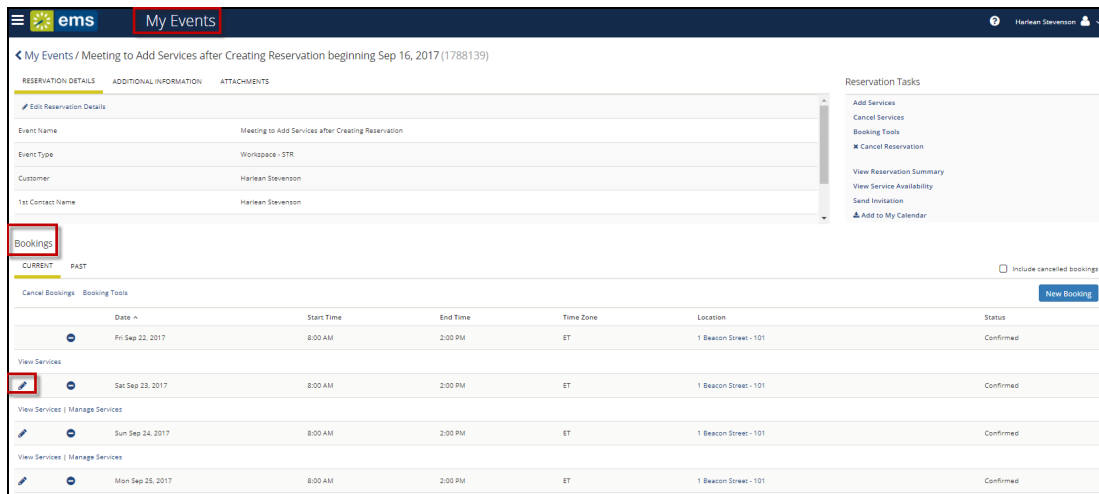


Use the Reservation Tasks and Bookings Sections to Edit Multiple Bookings

2. Make any necessary edits.
3. Click **Update Bookings**.

Edit the Location and/or Date and Time on a Single Booking

1. To navigate to the reservation you want to edit, click **My Events** on the side bar of the Home page.
2. Click on the reservation name you want to edit.
3. Under the Bookings section, click the **Edit** icon next to the booking. These options are available if you have permissions.



Editing a Booking in the Bookings Section of My Events

4. The **Room Request** window appears, where you can make changes to the booking.
5. If needed, you can edit the date and time of the booking under the **Date & Time** section.

6. Search for a new location under the Locations section in the left-hand column.
7. Click the **Add/Remove** link to select by Buildings or Views. Choose a Building or View. Click **Update Locations**.
8. In the Locations section, click **Search**.

**Note:**

Under the **Let Me Search for a Room** section in the left-hand column, you can select filters to apply to your search (e.g., Floors, Room Types, etc.).

9. Click the **Add (+)** icon to change the room in your booking.
10. Click **Update Booking** to save the changed location.

CHAPTER 76: Invite 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.



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 (*).

1. Begin [creating a reservation](#).
2. When you select attendees, the Create a Reservation window will show their availability in a calendar grid.

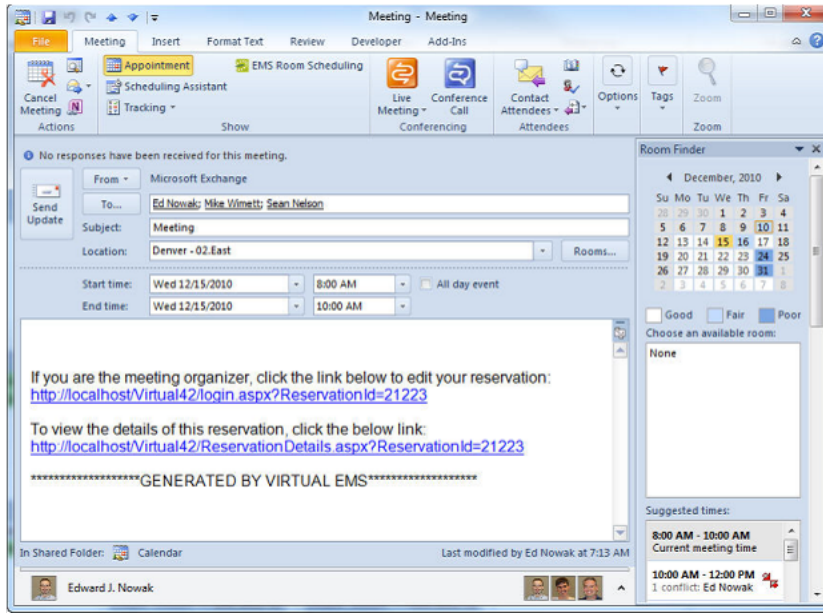
The screenshot displays the 'Manage Bookings' interface in the EMS Web App. On the left, the 'Event Details' section includes fields for 'Event Name' (Exchange Event), 'Event Type' (Conference), 'Date' (Fri 05/13/2016), and 'Time' (2:00 PM to 3:00 PM). The right side features a calendar grid for attendees and rooms. A search bar labeled 'Find Attendee' is highlighted with a red box and a circled '1'. A red arrow points from the search bar to a calendar grid cell, with a circled '2' and text: 'If your system is integrated with Outlook, attendee and room availability shows here.'



Note:

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

CHAPTER 77: Notifications in the EMS Web App

The EMS Web App automatically sends out notifications based on the filters on the notification rule.

There are five types of notification rules:

1. Bookings
2. Service Orders
3. Anything on a VIP Event
4. New Web Users
5. User-Defined Fields

These are mostly sent out a predefined amount of days prior to a booking. They are triggered when a change occurs on a booking, service order, etc., within that range of days.

Confirmations

Confirmations are either sent out automatically after a booking is made in EMS Web App, or manually from the EMS Desktop Client.

Confirmations 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 for Event Changes

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. 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.

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.

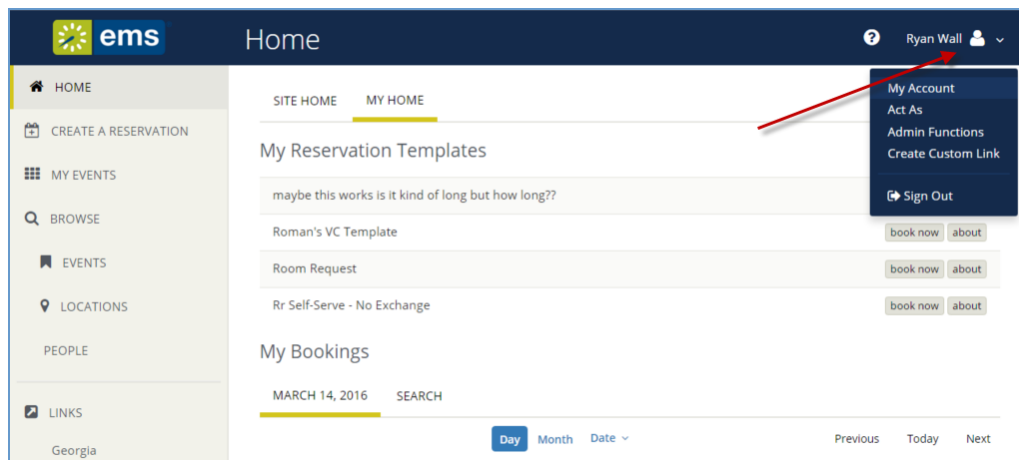
You must be licensed for EMS Desktop Client, EMS Web App, and Integration to Microsoft[®] Exchange in order to configure and use this capability. If you are unsure if your organization is licensed for Integration to Microsoft[®] Exchange, or if you would like to learn more about it, please contact your EMS Account Executive.

CHAPTER 78: Personalize 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, time-saving *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](#).



This section will provide information that will allow you to:

- [Change Account Information](#)
- [Establish Delegates](#)
- [Establish Booking Templates](#)
- [Set Favorite Rooms](#)

CHAPTER 79: Change Account Information

Under My Account, you can change your email address, name, phone number, fax number, time zone, and password.

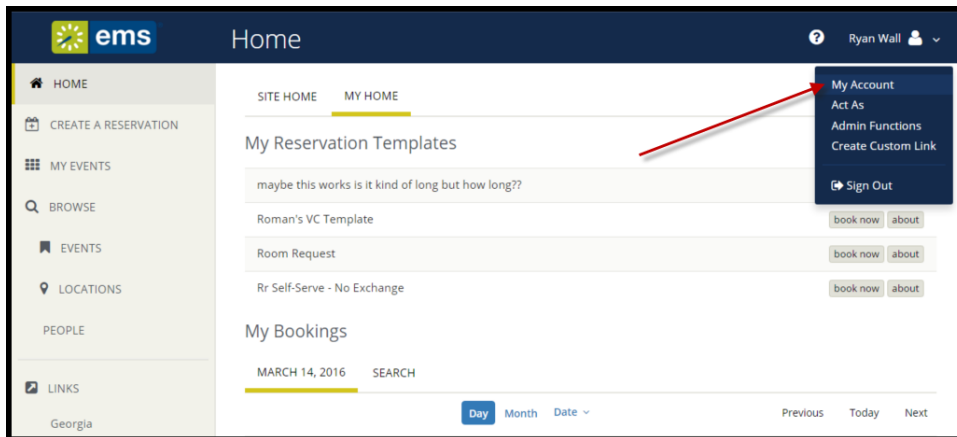


Note:

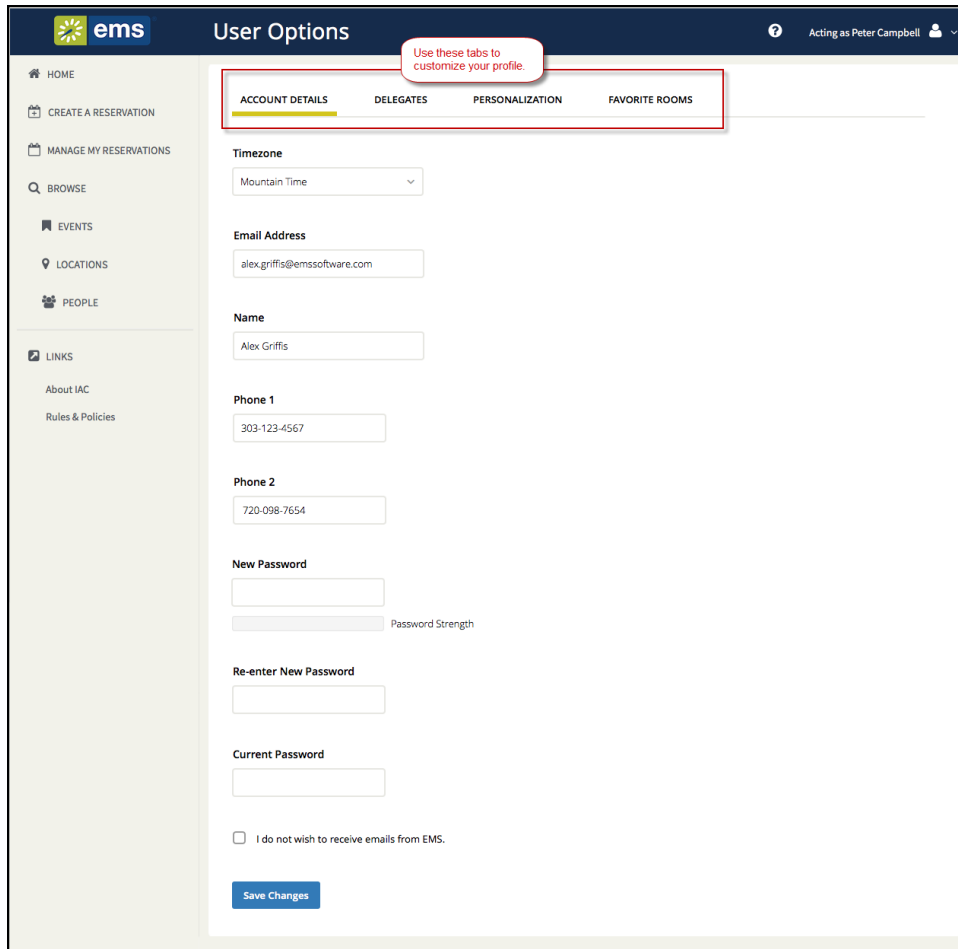
You can also personalize your EMS experience by setting default values for your templates and choosing favorite rooms. To further customize your EMS Web App account, refer to the following topics:

- [Create Delegate Accounts](#)
- [Set Default Values for Room Requests and Reservations](#)
- [Create a List of Favorite 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. 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 want 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 want 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, refer to the following topics:
 - [Create Delegate Accounts](#)
 - [Set Default Values for Room Requests and Reservations](#)
 - [Create a List of Favorite Rooms](#)

CHAPTER 80: Establish Delegates

You may want 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.

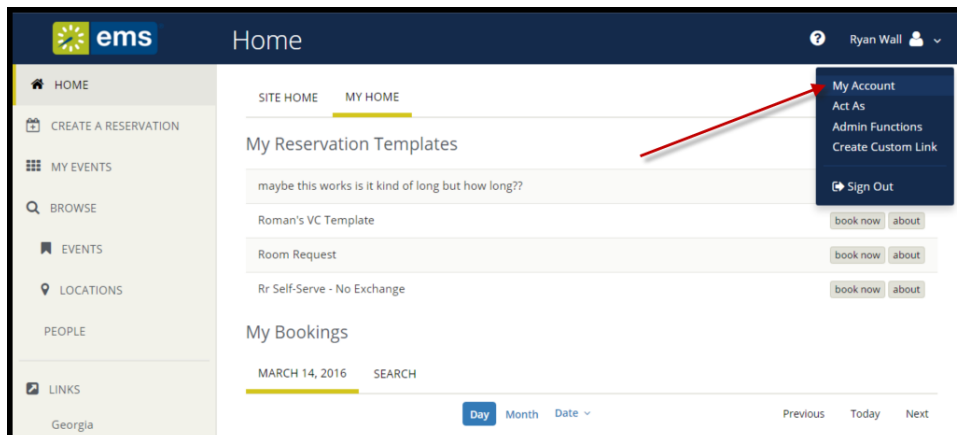
You begin by adding one or more EMS users to act as your delegate. Then they can log in and request to "Act As" you. You can keep track of their actions on your behalf, and any event invitations, cancellations, changes, room requests, service requests, and so on that they create on your behalf will appear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

Concept: Delegates Act As You. *Click for more...*

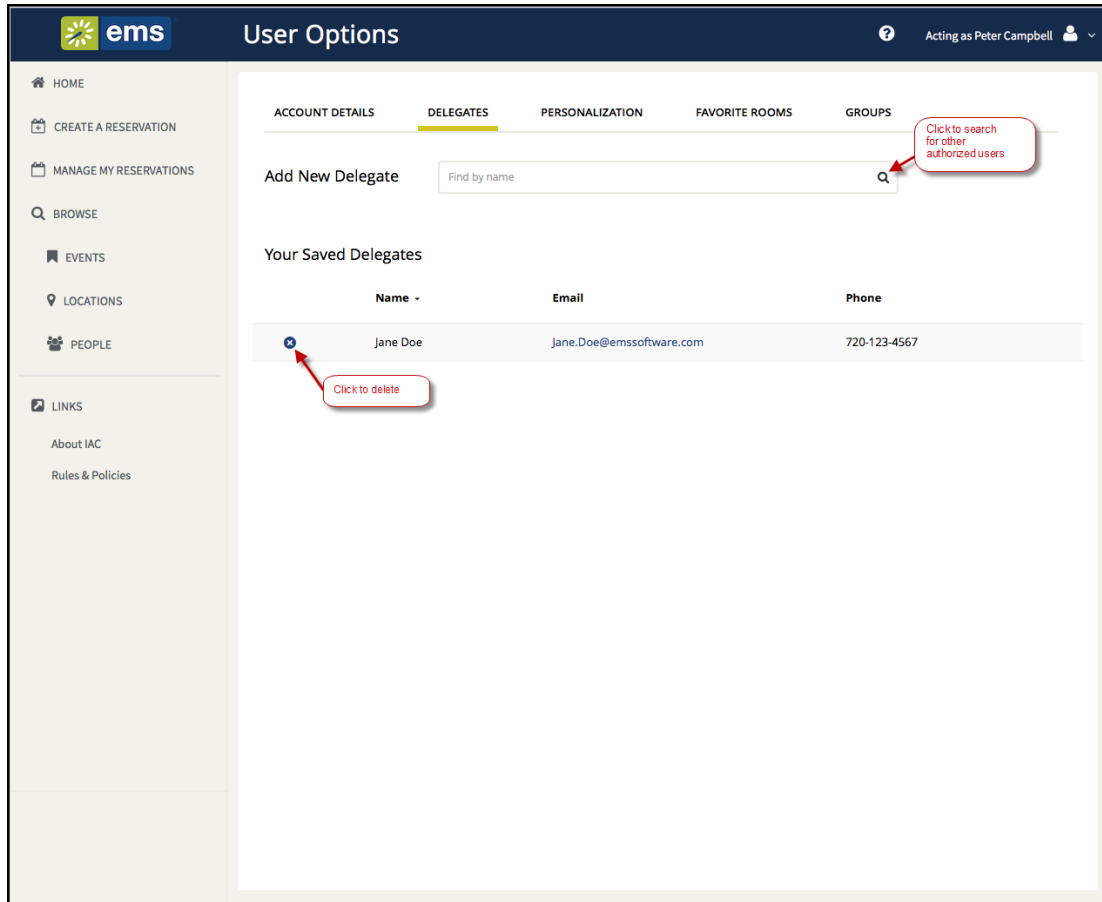
A *delegate* is another authorized user who can act as you in EMS Web App and carry out actions on your behalf. To delegate users, first you add them to your account as delegates under My Account. Then they can use the **Act As** option and select your name.

Add Delegates to Act As You

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

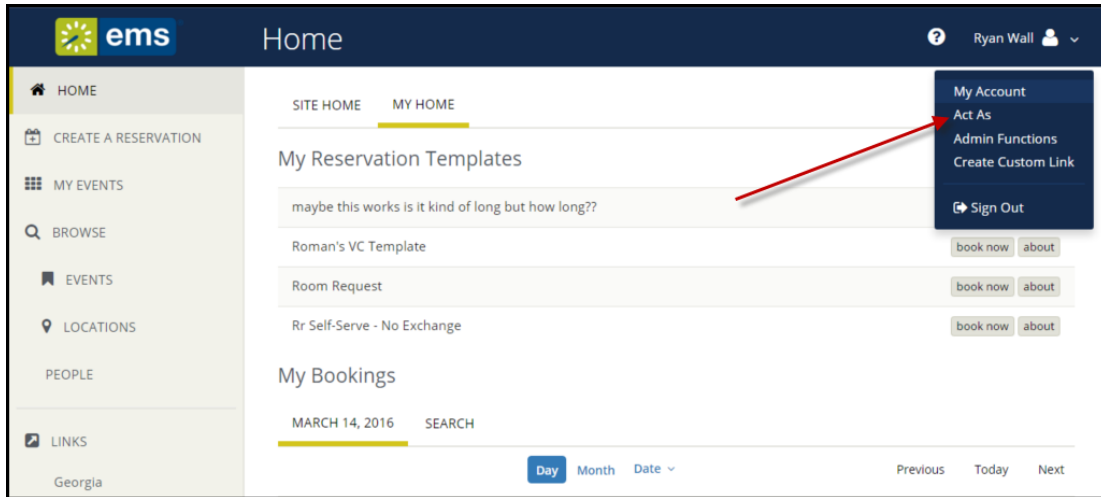


2. Click the **Delegates** tab and add your delegates.

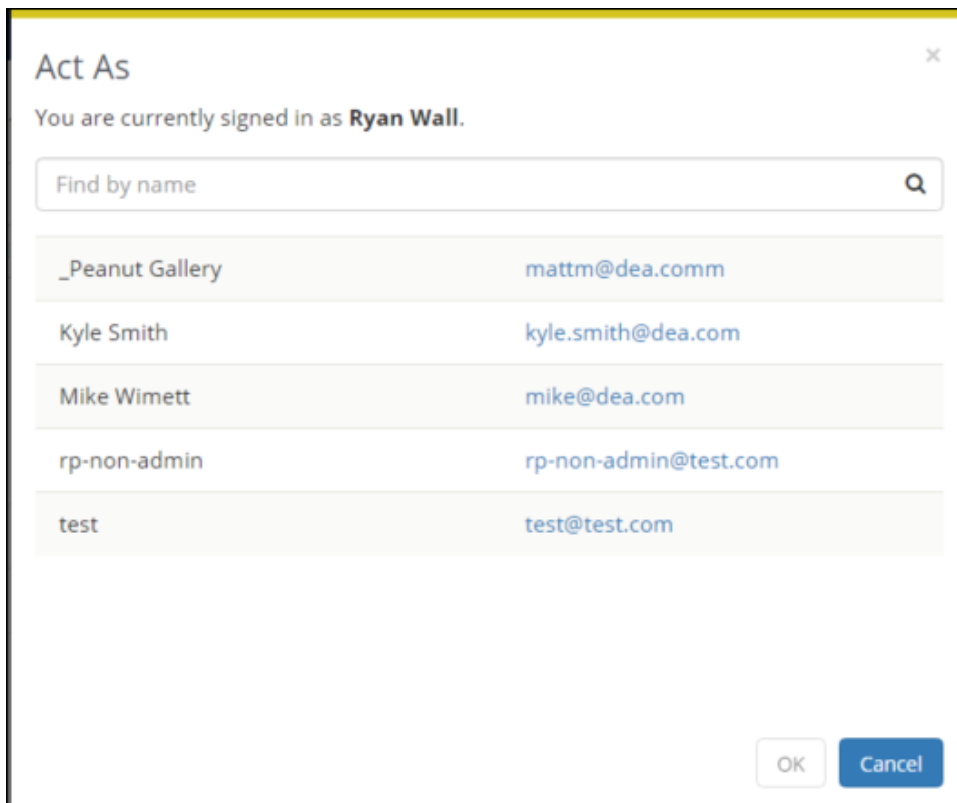


For the EMS Web App User Who Will Act on Behalf of Another

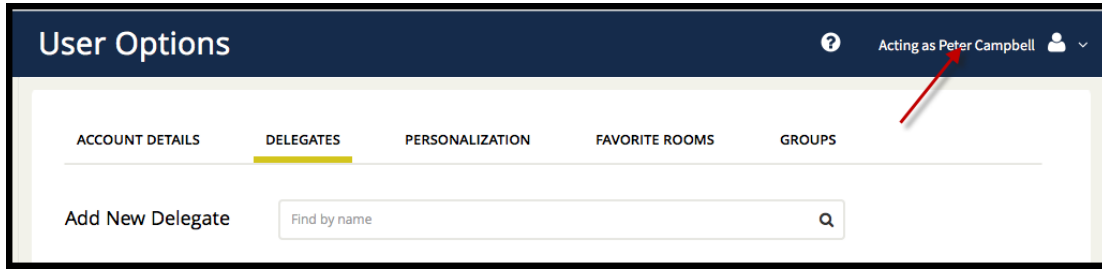
1. From the **My Account** dropdown, click **Act As**.



2. In the **Act As** popup, select which user you will be acting as and click **OK** to confirm.



Once activated, the user you are acting as will show in the upper-right corner of the EMS Web App, like this:

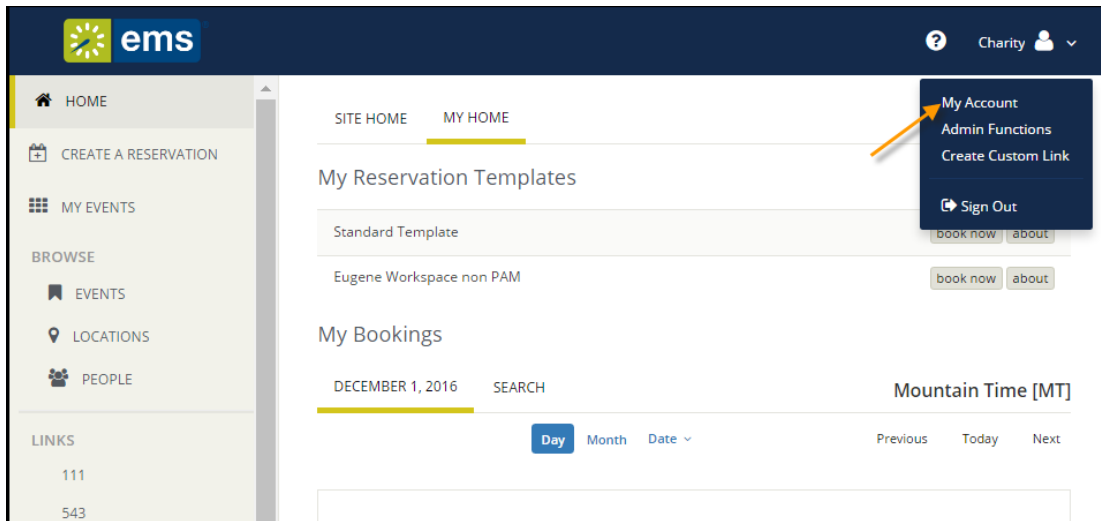


CHAPTER 81: Establish Booking Templates

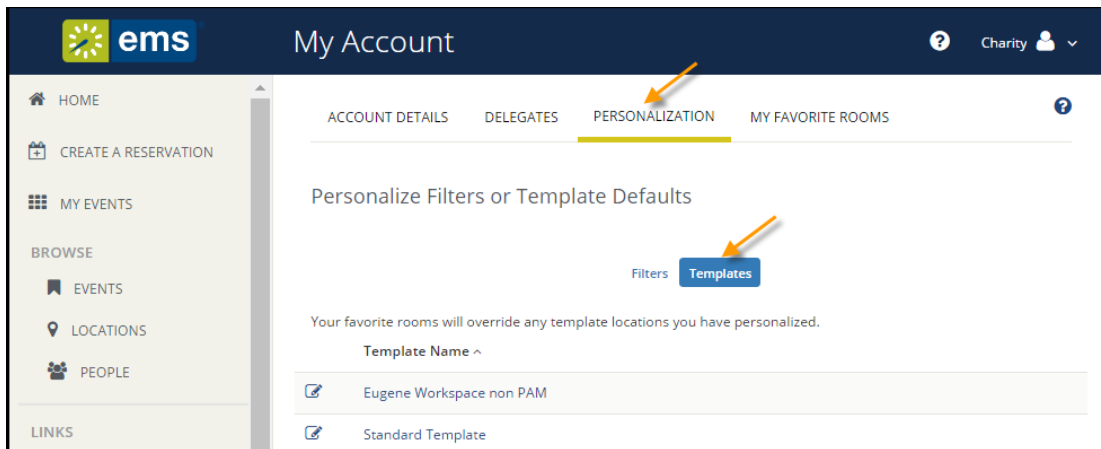
You can personalize booking templates to streamline your process for requesting rooms and making reservations (depending on your permissions). These templates appear on your personal EMS Web App home page after you save them.

Note: For more information about how booking templates work, see [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 want to change. The lower section changes to show options for the selected template.

**Note:**

Essentially, your settings here automatically populate field values and filter search results when you make room requests. For example, setting a Start Time here will set a start time for any room request you make using this template, and 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

**Note:**

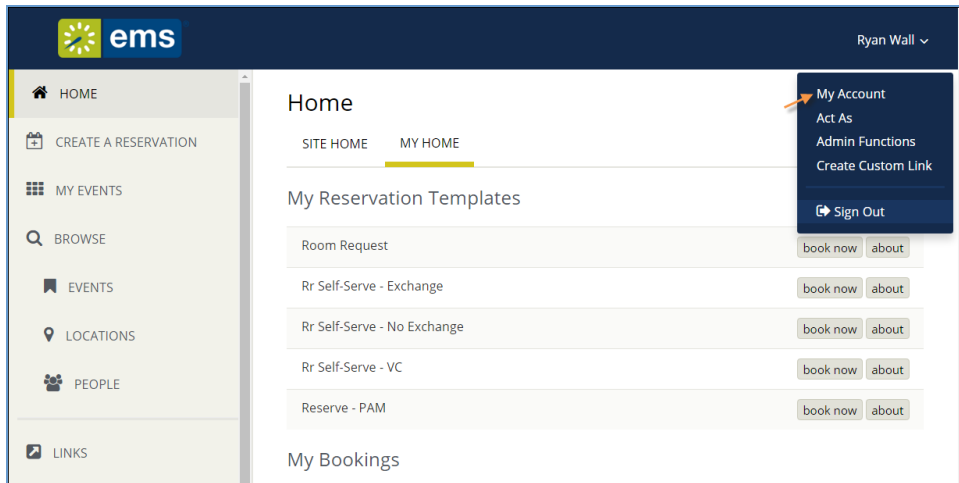
If you select the **Override location and time zone settings when I search for available space** option under Locations, this means that whenever you book using this template, you can change the default location for this template during the booking process. For example, if your template Location was 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**.

CHAPTER 82: Set Favorite Rooms

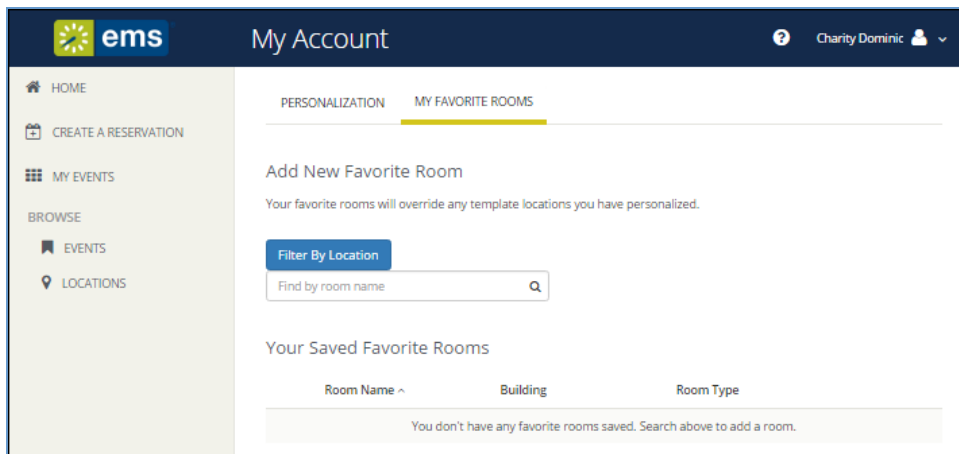
Under My Account, you can create a list of favorite rooms. This streamlines the process of searching for available space when you request or reserve rooms.

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 want to favorite (your search string is not case-sensitive but characters must be in the correct order). Enter your search string. The dropdown updates to show results (taking into account your Location filters).

ems My Account Charity Dominic

PERSONALIZATION **MY FAVORITE ROOMS**

Add New Favorite Room

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

Filter By Location

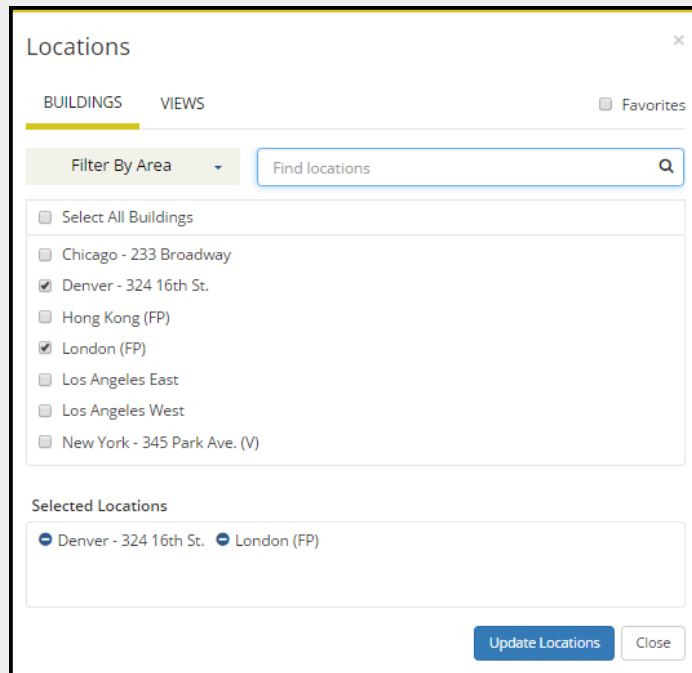
room

Collaboration Room 1 - Chicago - 233 Broadway - CT		
Collaboration Room 2 - Chicago - 233 Broadway - CT		
Conference Room 1 - Chicago - 233 Broadway - CT		
Conference Room 3 - Chicago - 233 Broadway - CT		
Team Training Room - Chicago - 233 Broadway - CT		
Training Room 2 - Chicago - 233 Broadway - CT		
Training Room 3 - Chicago - 233 Broadway - CT		
Conference Room 1224 - Hong Kong (FP) - HKT		
Training Room 1 - Hong Kong (FP) - HKT		
Training Room 2 - Hong Kong (FP) - HKT		
Collaboration Room 1 - London (FP) - GMT		
Collaboration Room 2 - London (FP) - GMT		
Collaboration Room 3 - London (FP) - GMT		
Collaboration Room 4 - London (FP) - GMT		

Building	Room Type
Chicago - 233 Broadway	Conference
Chicago - 233 Broadway	Training Room

**Note:**

You can filter your search results by clicking **Filter by Location**, which presents a list of locations by Building or view. Select the locations filters you want to apply (or search by keyword), and then click **Update Locations**. This filters the results of your keyword search on the Add New Favorite Room dialog (above). Your filter settings are saved, and you will have to go back in and remove them if you want to expand search results beyond these locations.



- 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.

**Note:**

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 **X** next to the room in **Your Saved Favorite Rooms**.

CHAPTER 83: Mobile Web App

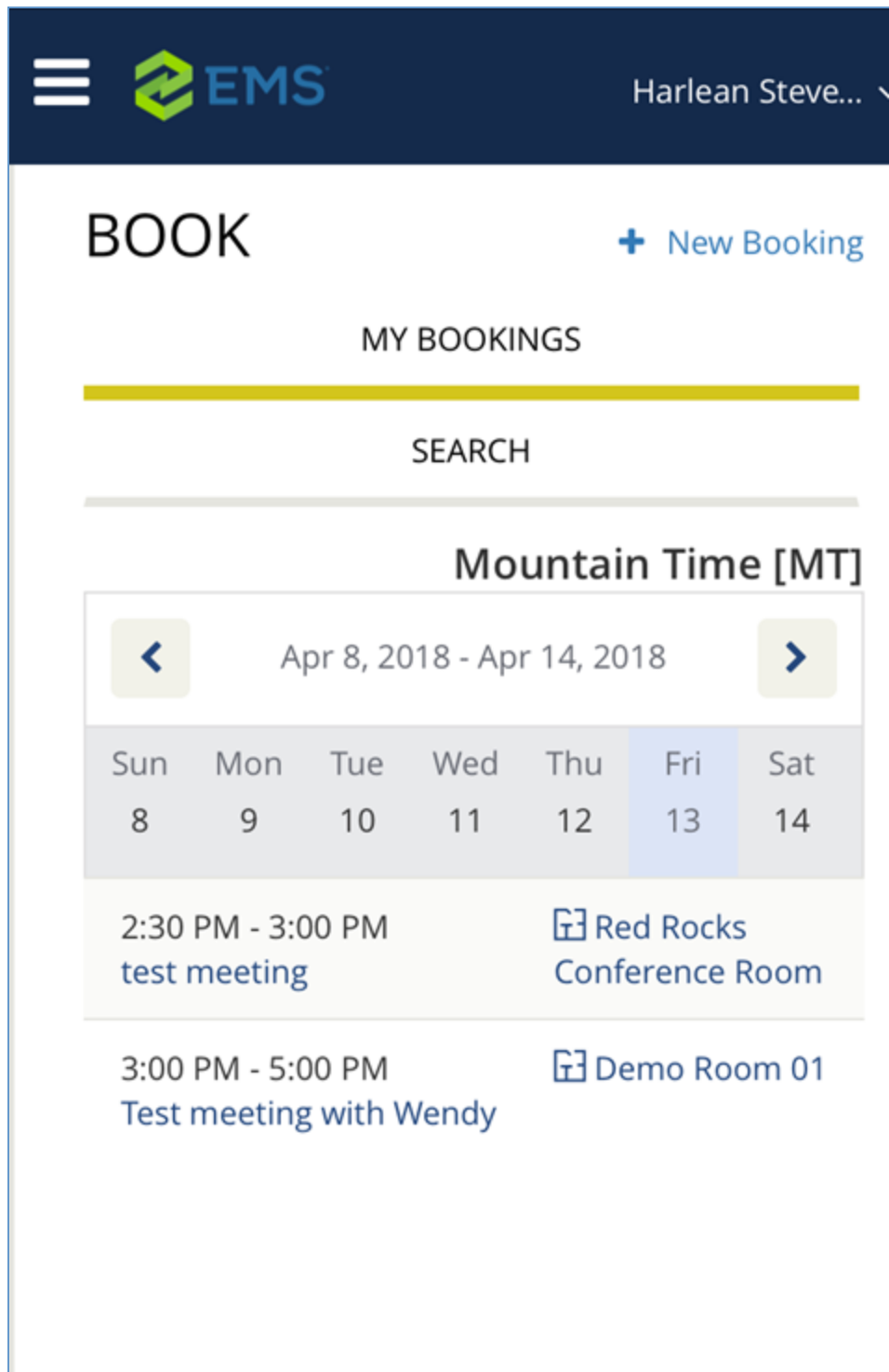
EMS Web App is available both in a desktop client version and in a mobile version. If you access EMS Web App from a mobile device, you are redirected to the mobile version of EMS Web App.

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

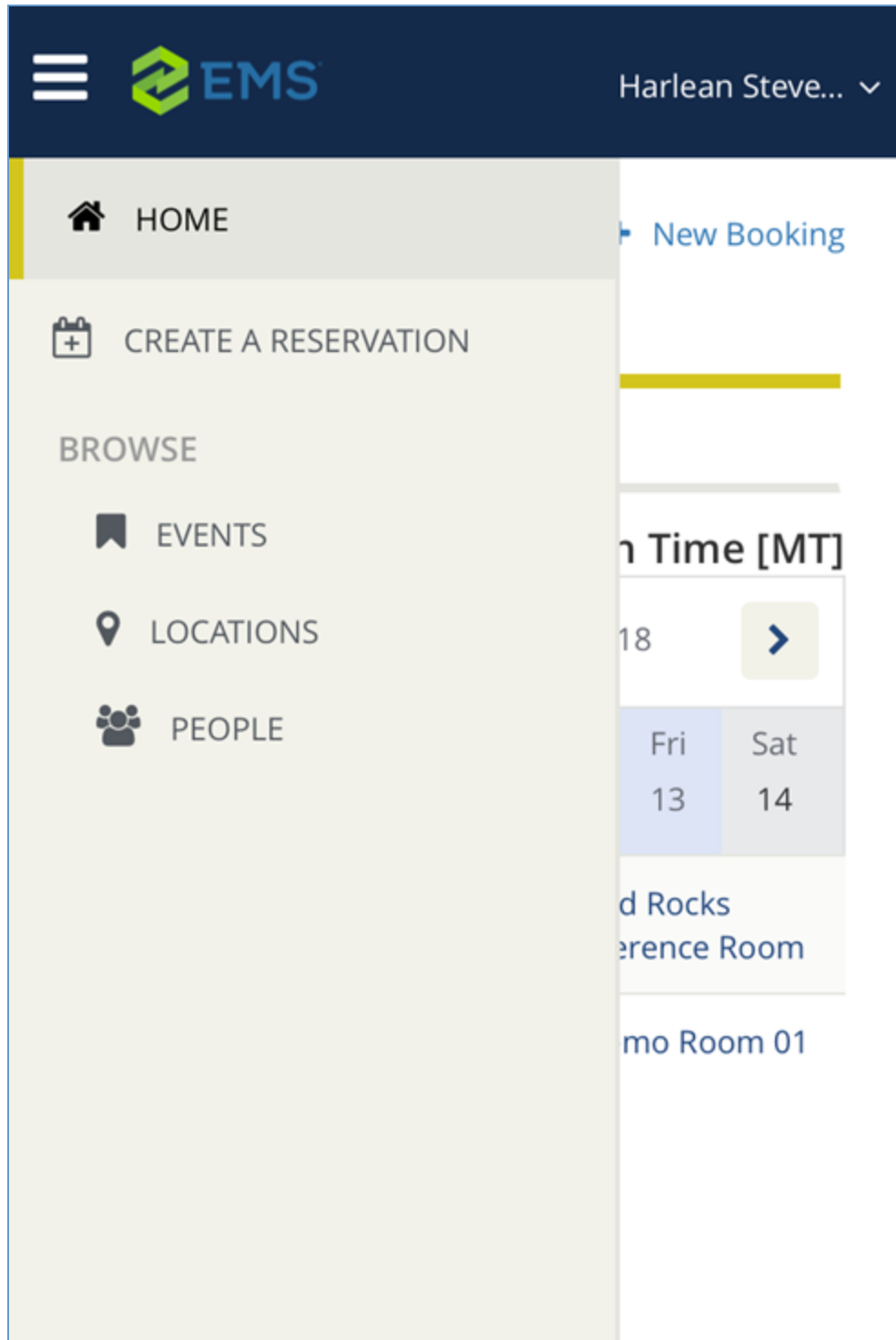
CHAPTER 84: Use the EMS Web App on Mobile Devices

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, drop-downs and menu bars will be reduced or abbreviated, and you will need to click to expand some regions and scroll to view some information.



Examples of the EMS Web App on a Mobile Device



Home Screen



Mobile Menu

Harlean Steve... ▾


Room Request

[Cancel](#)


[Next Step](#)

Date & Time


Date




Start Time



End Time



Create booking in this time zone





Add Skype to Reservation

[📍 Let Me Search For A Location](#)

[📍 I Know What Location I Want](#)


[Filter By Location](#)

Create Booking


Harlean Steve... ▾

Date & Time


Date



Start Time



End Time



Create booking in this time zone

Skype Meeting

Let Me Search For A Location

I Know What Location I Want

Filter By Location

Location Name

Edit Booking

Quick Tasks





Click on **Home** at any time to return to the Mobile EMS Web App Home page.

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

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

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.

What Is the Difference?

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 locations with numerous rooms and setups might be best done using a non-mobile browser, due to the volume of information you may want to see in one window.



Note:

To see "My Bookings" from anywhere in the mobile version of EMS Web App, simply click **Home**.

Functional Limitations

The following features of the EMS Web App on mobile devices are different than on a standard computer web browser and have limited functionality due to the parameters of mobile browsers and display area and data limitations:

- Available rooms display in a list view; schedule and Floor Plan views are not available.
- The Services tab is not available.
- You cannot book multiple rooms in Microsoft Outlook.
- You cannot book video conferences.
- The main menu is always hidden and accessible by clicking the Menu icon in the upper-left corner.
- You can only book one room per booking.
- The home screen only contains bookings and ability to search, and does not show the "Site Home" tab.
- When creating a new reservation, you type the name of the desired room rather than searching by keyword.
- To edit reservations on your My Events page, you tap the Edit icon next to the reservation.
- To see a room's schedule from the Browse Events page, click the grid icon next to the room name.

**Note:**

EMS also produces a mobile application for use on devices like smartphones.

See Also: [EMS Mobile App Versus EMS Mobile Web App: What Is the Difference?](#)

CHAPTER 85: 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.

EMS Mobile App = 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 App (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 App)

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

CHAPTER 86: Learn About EMS Web App

- **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, see [Browse Events, Locations, and People](#).
- **Why can't I make a reservation?**
Several settings control your capabilities as a user. For a deeper understanding, see [Create a Reservation in the EMS Web App](#).
- **Why are some options not available to me?**
This is probably because of settings controlled by your Administrator. For more detail about these settings, see [Understand 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, and 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.

EMS Web App FAQs

- [Booking Templates, Requests, and Reservations](#)
- [Delegates Act as You](#)
- [My Events vs. Browse Events](#)
- [Notifications Automatically Alert People to Changes in EMS](#)
- [EMS for Outlook® \(Optional Capability\)](#)
- [Integration with Exchange Enables You to Use Outlook®](#)
- [Reservations, Bookings, and Booking Details](#)
- [Troubleshoot Internal Server Error When Viewing My Events in EMS Web App](#)
- [Understand Everyday User Templates](#)

CHAPTER 87: Booking Templates, Requests, and Reservations

Booking Templates

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

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

You can set up default values of the templates that are available to you so that you can more quickly make your reservations. For example, if you book a workspace every day from 8:30 am to 4:30 pm, 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 can 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.

CHAPTER 88: Delegates Act As You

Delegate

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.

See [Establish Delegates](#) for instructions on adding delegates to act as you.

CHAPTER 89: MY EVENTS vs. BROWSE EVENTS



Important!

If you [logging in and out](#) as a guest, you will only have permissions to request reservations, therefore the MY EVENTS option will not be available.

What is the Difference Between MY EVENTS and BROWSE EVENTS?

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

MY EVENTS = Reservation Management

Clicking **My Events** 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 **Browse > Events** 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.

CHAPTER 90: Notifications Automatically Alert People to Changes in EMS

In EMS, 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®.

CHAPTER 91: EMS for Outlook® (Optional Capability)

EMS for Outlook® is an optional (extra cost) purchase. If your organization has purchased it, then you will see the EMS plug-in icon in your Outlook application. You will also see additional features and functionality in EMS. Furthermore, 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.

CHAPTER 92: Integration with 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 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.

See Also: [Integration to Microsoft® Exchange Guide](#)

CHAPTER 93: Reservations, Bookings, and Booking Details

The two essential EMS components for meeting and event scheduling are reservations and bookings. To use the EMS Web Client efficiently and effectively, you must understand the structure of a reservation in EMS, the concept of an event timeline for a reservation booking, and how to make a reservation. This section covers the following topics:

- [Reservation Structure](#)
- [Event Timeline](#)
- [Make a Reservation Using the Reservation Wizard](#)
- [View and Edit Reservations in the Reservation Book](#)

Reservation Structure

An event in EMS Desktop Client is comprised of the following:

1. A **Reservation**
2. One or more **Bookings**
3. Booking details

These three components exist in a hierarchy—a reservation contains one or more bookings, and each booking can have one or more details associated with it.

Reservations

A reservation is the who and the what of an event. For example, Group X (the who) can reserve some space for an Event Y (the what). A booking is the where and the when of an event. For example, Group X can schedule the conference room (the where) for a staff meeting on the second Monday in January (the when). Group X now has a single reservation with a single booking in EMS. If, however, Group X schedules the conference room (the where) for a staff meeting on the second Monday of each month for a calendar year (the when), then Group X now has a single reservation with twelve bookings in EMS.

Booking Details

A booking can have one or more booking details associated with it. Booking details are the resources or services that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for Group X's staff meeting, the resources could include the requested catering (coffee service, bagels and muffins, and so on) and the A/V equipment (a projector, a speaker's podium, and so on).

Event Timeline

The following time designators are used for an event in EMS Desktop Client:

- **Event Time:** The time period during which the event actually takes place.
- **Setup/Teardown Hours:** The hours, or fractions of hours, that you add to the event time to allow staff to prepare a room for the event or to clean up after the event.
- **Reserved Time:** The total time for which the space (the where) is reserved. This time is the event time plus the setup/teardown time.

Variable	Time
Reserved Start Time	8:00 a.m.
Setup Hours	1 hour
Event Start Time	9:00 a.m.
Event End Time	4:00 p.m.
Teardown Hours	1.5 hours
Reserved End Time	5:30 p.m.
Reserved Time	9.5 hours

Make a Reservation Using the Reservation Wizard

The Reservation Wizard allows you to check for available space and make a reservation for an event. You can search for rooms that are available for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings). You can also create a series reservation by selecting one date and time, but multiple rooms. To make a reservation using the wizard, you must do the following:

- [Specify the Event Date and Time Information](#)
- [Specify the Event Time and Status](#)
- [Select the Event Location](#)
- [Specify the Event Information](#)

**Note:**

The following procedure describes how to make a reservation by selecting values for the required and optional fields.

- If your EMS administrator has configured reservation wizard templates, then a Reservation Wizard Template dropdown list is displayed at the top of the Reservation Wizard. You can facilitate the making of a reservation in the Reservation Wizard by selecting the appropriate template from the list, which automatically sets the default values for many of the fields in the Reservation Wizard.
- If your job entails making multiple reservations that require the same information, and you are not using reservation wizard templates, then you can set your own default values for many of the fields in the Reservation Wizard.

Specify the Event Date and Time Information

1. On the EMS Desktop Client toolbar, click the **Wizard** icon. The Reservation Wizard page opens.
2. If needed, use the scroll features on the top of the **Calendar** to open the calendar for a different month (< or >), or click a month at the top of the calendar to open a dropdown list from which you can select a different month. You can also click a year at the top of the calendar to open a dropdown list from which you can select a different year.
3. If the event dates do not follow a pattern, use one or more of the following options for entering a date:
 - Click on the dates on the calendar that the event is to take place.
 - To select all five weekdays in a week, click in the blank space that is to the left of the week.
 - To select all seven days in a week, double-click in the blank space that is to the left of the week.
 - To select every occurrence of a specific day of the week for the displayed month (for example, all Sundays in June, 2017), click the heading (S, M, T, and so on) for the day.
 - To select every occurrence of a specific day of the week that is currently displayed onscreen (regardless if the day falls within the same month), double-click the heading (S, M, T, and so on) for the day.
4. If the event dates do follow a pattern, (for example, the third Friday of every month), click **Date Pattern** at the bottom of the Calendar to open the Date Pattern dialog box and enter your event date information. As you specify the event dates, the following occurs:
 - The **Selected Dates** tab at the top of the Calendar is automatically updated with the selected dates.
 - If your EMS administrator has configured any of the dates as a holiday or closed, then holiday dates are displayed in green on the **Calendar** tab and closed dates are displayed in red. For any

date, after you select the date on the Calendar tab, you can:

- Toggle between the Calendar tab and the Selected Date tab. Open the **Selected Dates** tab, select the date, and then click **Go To Date**.
 - You can remove a date from the list of selected dates by opening the Selected Dates tab, selecting the date (or CTRL-click to select multiple dates), and clicking **Remove**.
 - For dates that are configured as a holiday or as closed, you can:
 - Place your cursor on a holiday date to open a tooltip that shows the name of the holiday.
 - View information about the date from the Selected Dates tab. Open the **Selected Dates** tab, scroll to the date, and then click **Holidays** to open a Holidays dialog box that displays information about the holiday.
 - Place your cursor on a closed date to open a message that states that you cannot select the date because the date is closed.
5. Continue to specify the event time and status.

Specify the Event Time and Status

1. Specify the start time and end time for the event in one of two ways:
 - Click the **Time Picker** icon to open a dropdown list from which you can select a time for each field.
 - Under the **Time** section, manually enter the start and end times from the dropdowns. If applicable, select the appropriate Time Zone for the event.
2. Specify the Setup and Teardown times in one of two ways:
 - To use the default setup and teardown times that your EMS administrator has assigned to the rooms in your system, leave the Use Default checkbox selected.
 - Override the default setup/teardown times by clearing the **Use Default** checkbox, and selecting **Minutes or Hours**, and entering your own setup and teardown times.
3. Indicate the status for the event.
4. Continue to select the event location.

Select the Event Location

You have three options for selecting the event location, which are indicated on the first page of the Reservation Wizard:

1. [Standard](#): Use this option to display a list of all the available rooms that meet all the requested dates.
2. [Best Fit](#): Use this option if no one room can meet all the requested dates. The system lists rooms along with the number of bookings for which you can reserve the room. You can piece together the entire reservation using Best Fit, or just part of it.
3. [Specific Room](#): Use this option to confirm the availability and reserve of one specific room for the scheduled event.

I. Search for a Standard Room

1. Select **Standard**.
2. Choose one of the following for room specifications:
 - **Type** is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.
 - **Floor** is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.
 - **Setup Type** is the physical layout or arrangement of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.
 - **Setup Count** is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.
3. To select a **Feature**, open the Features tab, select the Feature, or CTRL-click to select the multiple features that the room must have.
4. Click **Next**. Up to two tabs are displayed:
 - The **Available** tab, which is the active tab and is always displayed, lists all the rooms that meet all your event criteria.
 - If you have elected to show the Available All Day Indicator, the rooms that are available all day are marked with an asterisk (*).
 - By default, the available rooms are sorted alphabetically by room code. If your EMS administrator has configured the rooms for your EMS implementation with a book sequence, then under Options, select Sort Rooms by Book Sequence to sort the rooms from lowest to highest book sequence. (If two rooms have the same sequence, then the rooms are sorted alphabetically by name within the sequence.)
 - The **Conflicts** tab is displayed only if there are rooms that are not available for the requested dates/times. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling as well as list of the events that are scheduled for each room.

5. Select the room, or CTRL-click to select the multiple rooms that you are scheduling for the event.
6. Click **Room Info** to open the Room Info dialog box and view information about the room properties, notes, Room URL, Building URL, setup type and capacity, and features. Click **Close**.
7. Click **Building Hours** to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date. Click **Close**.
8. Click the **Move** button (>) to move the rooms to the Selected list.
9. Click **Next** to [specify the event Information](#).

II. Search for a Best Fit Room

1. Select **Best Fit**.
2. Leave **Building** set to the default value of (all), or select a specific Building, Area, or View in which to search for a best fit room.
3. Choose one of the following for room specifications:
 - **Type** is the class or category of the room, for example a meeting room, a workspace, and so on. Leave Type set to the default of (all) to search for all pre-configured room types or select a specific room type from the Type dropdown list.
 - **Floor** is optional information when you are searching for a room. Leave Floor set to the default value of (all) to search for all pre-configured floors or select the floor from the Floor dropdown list.
 - **Setup Type** is the physical layout or arrangement of a room, for example, rounds of 6 or theater-style. Leave Setup Type set to the default value of (all) to search for all pre-configured setup types or select the setup type from the Setup Type dropdown list.
 - **Setup Count** is the anticipated attendance for the event. If you selected a specific setup type, then you must enter the setup count.
4. Open the **Features** tab, and then select the feature, or CTRL-click to select the multiple features that the room must have.
5. Click **Next**. Up to two tabs are displayed:
 - The **Available** tab, which is the active tab and is always displayed, has two lists. The list in the left pane is a list of all the rooms that meet some or all of your event criteria. The list in the right pane is a list of all the event dates that must be fulfilled.
 - The **Conflicts** tab is displayed only if there are rooms that are not available for the requested dates. Optionally, you can open the Conflicts tab to view the list of rooms that were not available for scheduling for the event as well as list of the events that are scheduled for each room.

6. Choose one or both of the following:
 - Click **Room Info** to open the Room Info dialog box and view information about the room properties, notes, Room URL, Building URL, setup type and capacity, and features. Click **Close**.
 - Click **Building Hours** to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date. Click **Close**.
7. Choose one of the following:
 - If one is available, select the single room that is available for all the requested dates, and then click the Move button (>) to move the room to the **Event Dates** list.
 - If a single room is not available, select a room that is available for some of your requested dates, and then click the Move button (>) to move the room to the **Event Dates** list. Repeat this step as needed to fulfill all the event dates.
8. Click **Next** to [specify the event information](#).

III. Search for a Specific Room

You can use the **Specific Room** search to book a standard EMS room or a room or area that is not managed in EMS. An override room, or “override description,” is used to book an event in a space that has not been configured in your EMS system. For example, your EMS administrator might have configured an override room named “Other Area” in the Engineering building. To book an event in Dr. Wilson's office, which is a room that is not defined in EMS, in the Engineering building, you can select the “Other Area” room and specify “Dr. Wilson's Office” for the location. EMS does not track availability for events booked in override rooms; however, EMS reports on events that are scheduled in an override room just like any other event scheduled for any other room.

1. Select **Specific Room**. The Room Selector dialog box opens. By default, (all) buildings is selected.
2. Do one of the following:
 - To select a room from a list of all rooms in all available buildings:
 - Leave (all) selected on the Buildings dropdown list.
 - Click the **Add** icon next to a room to select it.
 - If the room is configured as an override room, continue to the next step.
 - To select a room from a list of rooms in a specific building, area, or view:
 - Select a specific building, area, or view.
 - Click the **Add** icon next to a room to select it.
 - If the room is configured as an override room, continue to the next step:
 - In the **Location** field, enter the location of the override room, and then click **Next**. Two results are possible:


- If the event is scheduled for a single date and the room is available, then continue to the next step.
 - In all other cases, (for example, the event is scheduled for a single date but the room is not available or it is a multiple date event), the Available tab opens. This tab lists all the event dates for which the specific room is available.
- 3. Optionally, before you move a date to the Selected list, click Building Hours to open the Building Hours dialog box which displays the hours that the selected room/building is open on the selected date.
- 4. Optionally, before you move a date to the Selected list, do one or both of the following:
 - Click **Room Info** to open the Room Info dialog box and view information about the room properties, setup type, features, and pricing.
 - Click **Building Hours** to open the Building Hours dialog box which displays the hours that the selected room/building is open on the reserved date.
- 5. Do one of the following:
 - If the specific room is available for all the event dates, then click the **Move All** button (>>) to schedule the room for all the event dates.
 - If the specific room is not available, try another approach, such as reserving a different specific room, or try using the Standard or Best Fit search method.
- 6. Click **Next**.




Specify the Event Information



After you select an event location(s), you must specify other information for the event.


1. Enter the event information.





Field	Description
Event	
Event Name	A name or description for the event.
Event Type	The classification for the event.
VIP Event	Select this option to mark the event as a Very Important event.
Source	The reservation source.
Video Conference	Select this option for a video conference event.

Field	Description
Employee/Contact	
Employee	<p>Click the Search icon to open an Employees dialog box in which you search for and select a specific employee from a list all employees that are available in your system for hosting/sponsoring an event.</p> <ul style="list-style-type: none"> • To search a list of all employees, leave the Find field in the Lookup dialog box blank, and then click the Search icon • To search for a specific employee, enter a search string in the Find field, and then click Search icon. Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and it is not case-sensitive. For example, the search string sim returns Paske, Simon and Simington, Chance. • To select an employee, click the Add icon next to the employee. • If the employee that you want to select for the reservation is not available on the pre-configured list, then you can click the Employee icon to open the Employee dialog box and add the employee. <div data-bbox="418 982 1404 1255" style="border: 1px dashed gray; padding: 10px;"> <p> Note: After you select an employee, you can click Employee Info at the bottom of the Reservation Wizard page to open a dialog box that displays the properties for the employee, any user-defined fields for the employee, and any comments that are associated with the employee.</p> </div>
1st Contact Temp Contact	<p>When you select a group, if a default contact has been defined for the group, then this field is automatically populated with the name of the contact; otherwise, the field is blank. You have several options for defining the 1st Contact for a reservation:</p> <ul style="list-style-type: none"> • If the field is blank, but contacts have been configured for the group, you can select a contact from the pre-configured list. • If the field is populated with a default value, but other contacts have been configured for the group, you can select a different contact from the pre-configured list. • If you want to create a temporary contact just for this event, then select (temporary contact), and in the Temp Contact field, enter the name for the temporary contact.

Field	Description
	<div style="border: 1px dashed gray; padding: 10px;">  <p>Note: If a default contact has been configured for the employee, then any modifications that you make for the contact apply to this reservation only. The next time you or anyone else creates a reservation for this group, the 1st Contact field is again automatically populated with the name of the default contact.</p> </div>
2nd Contact Temp Contact	Define if necessary for the event.
Phone Fax Email Address	<p>One more of these fields might be automatically populated depending on how a selected contact has been configured. You can manually edit these values if needed.</p> <div style="border: 1px dashed gray; padding: 10px;">  <p>Note: The Phone and Fax fields have a dropdown list available on which you can select a different value (Cellular, Fax, Office, Other, Primary) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.</p> </div> <div style="border: 1px dashed gray; padding: 10px; margin-top: 10px;">  <p>Note: If default values have been configured for a selected contact, then any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same contact, these fields are again automatically populated with the default information.</p> </div>
Room Setup Tab	
Setup Type	If you selected a specific value for the setup type when searching for an event location, this value is carried forward to this field; otherwise, the field is blank. You can select a setup type for this field, or if the field is already populated, you can select a different setup type.
Setup	If you entered a specific value for the setup type when searching for an event location,

Field	Description
Count	this value is carried forward to this field; otherwise, the field is blank. You can enter a value in this field, or if the field is populated, modify the value.
Billing Tab	
	<div style="border: 1px dashed gray; padding: 10px;">  Note: Depending on the group that you select, one or more of these fields might be automatically populated with default values. You can edit these default values but any modifications that you make apply to this reservation only. The next time you or anyone else creates a reservation for the same group, these fields are again automatically populated with the default billing information. </div>
Pricing Plan	Indicates what type of pricing is to be used for the event.
Cost Center Number	<p>The internal alphanumeric billing code that is associated with the group. You can manually enter a value in this field, or if a master list of billing reference numbers has been configured for the group, you can click the Search icon to open a Cost Center Numbers dialog box, and select the appropriate value from this list.</p> <div style="border: 1px dashed gray; padding: 10px;">  Note: To search for a specific cost center number, enter a search string in the Find field, and then click the Search icon. The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a string of co returns CO-123, but <i>not</i> 123-CO. </div>
Sales Category	How the group is sorted for purposes of tracking sales figures (e.g., local, regional, national, etc.).
Payment Type	Indicates how the group paid for the event (cash, check, charged, and so on).
Dept. Code/PO Number	The internal alphanumeric purchase order number that is associated with the group. You can manually enter a value in this field, or if a master list of purchase order numbers has been configured for the group, you can click the Search icon to open a Purchase Order Numbers dialog box, and select the appropriate value from this list.

Field	Description
	<div style="border: 1px dashed gray; padding: 10px;">  <p>Note: To search for a specific purchase number, enter a search string in the Find field, and then click the Search icon. The string is not case sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, a string of co returns CO-123, but <i>not</i> 123-CO.</p> </div>
Salesperson	The user who “sold” the event.
Other Tab	
Event Coordinator	The Event Coordinator assigned to the event.
Estimated Event Attendance	The estimated number of people who are expected to attend the event.
Calendar Style	Drop-down list of all the available formats for printing this event on the Event Calendar and Event Schedule reports.
URL	The event URL.
Virtual Tab	
Everyday User	<ul style="list-style-type: none"> • To specify the everyday users who can view/manage this reservation in VEMS, click the Search icon to open the Everyday Users search dialog box and search from a list of registered everyday users. • You can search by User Name or Email Address • To search a list of all available everyday users, leave the Find field in the Lookup dialog box blank, and then click the Search icon • To search for a specific everyday user, enter a search string in the Find field, and then click Search icon

Field	Description
	<div data-bbox="487 273 1404 619" style="border: 1px dashed gray; padding: 5px;">  <p>Note: The string is not case-sensitive, but your search is limited to the exact order of characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bb returns bbosworth@dea.com but <i>not</i> dbobbett@dea.com.</p> </div> <ul style="list-style-type: none"> • To select an everyday user, click the Add icon next to the user. <div data-bbox="487 714 1404 871" style="border: 1px dashed gray; padding: 5px;">  <p>Note: To return this field to the (no change) value at any time, click Reset.</p> </div>
<p>Process Template</p>	<p>The process template that defines the functions that are available for the selected everyday user.</p> <div data-bbox="414 1018 1404 1218" style="border: 1px dashed gray; padding: 5px;">  <p>Note: An Everyday User might be assigned to more than one process template, so make sure to select the template that is applicable for this reservation.</p> </div>
<p>User Defined Fields Tab</p>	
	<p>User-defined fields are additional fields that store custom data for a reservation. Your EMS administrator configures the types of fields that are available as well as the allowed values for these fields.</p> <ul style="list-style-type: none"> • To enter or modify a value for a field, select the field, and then click Set Value. • To clear a value for a field, select the field, and then click Clear Value. <div data-bbox="414 1585 1404 1753" style="border: 1px dashed gray; padding: 5px;">  <p>Note: If a user-defined field is not required here, you can always supply a value for it at a later date in the Navigator.</p> </div>

2. Click **Finish**. Two results are possible:
 - a. If you did not enter information into required fields, then these fields are outlined in red. You must enter values into these fields and then click Finish again to open the Navigator page.
 - b. The Navigator opens. The reservation information is displayed in the Navigator. You use the Navigator to add booking details and to make any needed modifications to the reservation and its bookings.



Important!

A reservation is not complete and rooms are not removed from the Available list until you click **Finish**. Although unlikely, it is possible for another user to select and reserve a room during the time period after you have selected the room but before you have finalized the reservation. If this occurs, after you click Finish, a message opens stating that your reservation conflicts with an existing reservation.

View and Edit Reservations in the Reservation Book

The Reservation Book provides a graphical view of all the confirmed reservations (the reserved time as well as the room for which the reservation is scheduled) for your organization. (Canceled bookings are not shown.) You use the Reservation Book to view information for a reservation, to edit an existing reservation, and to make a new reservation. In addition, when the Reservation Book first opens, before you edit or make a reservation, you can change the Reservation Book view so that it better suits your working needs.

This section will provide information on the following topics:

- [Open the Reservation Book](#)
- [Change the Reservation Book Display](#)
- [View Reservation Information](#)
- [Make a New Reservation](#)
- [Edit an Existing Reservation](#)

Open the Reservation Book

1. From the toolbar, click the **Book** icon. The first time that you open the Reservation Book for your EMS implementation, by default, the Filter dialog box opens on top of a blank Reservation Book. You can leave the room filtering criteria set to their default values, or you can select different values as needed, and then click **OK**. All reservations that meet the filtering criteria and that are scheduled for the current day's date are displayed in the book in the Daily view.

**Note:**

You might need to use the book's scroll features to scroll through all the reservations that are scheduled for the current day's date.

- If an event is scheduled for a room that is a component of a combination room, then the reservation text is displayed in black. A duplicate reservation is also shown for the combination room; however, the reservation text is displayed in gray to indicate that a component of the combination room is currently booked for the indicated time and therefore, the combination room is not available
- Conversely, if an event is scheduled for a combination room, then the reservation text for the combination room is displayed in black and the reservation text for each component is displayed in gray. This reversed color coding indicates that the component room is currently booked for the selected time and that none of the components is available.

**Note:**

The Reservation Book has the following appearance:

- Minimum and maximum capacities are displayed next to room descriptions
- The current time is shown by a vertical line in the grid, called the Current Time Indicator
- If building hours have been configured for a building, then this information is displayed for the building

The reservations are displayed with three components:



- A left bar that indicates the setup time
- A middle bar that indicates, by default, the event name
- A right bar that indicates the teardown time

Change the Reservation Book Display

1. On the EMS Web Client toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. You can change the Reservation Book display in the following ways:
 - Change the **list of rooms** that are displayed in the Reservation Book based on **room properties**.
 - Change the **list of rooms** that are displayed in the Reservation Book based on a **specific room (s)**.

- Change the **Reservation Book view**.
 - Change multiple **display options** for a reservation.
 - Select which items to include in the **tooltip** that opens when you place the cursor over an event in the Reservation Book.
 - Change the display date using the **calendar**.
 - Change the display date using the Reservation Book **scroll features**.
3. To change the list of rooms based on room properties:
 - a. Click **Filter** if the Filter dialog box is not already open.
 - b. Select Room Properties and customize one or more of the following:
 - Leave the Building dropdown list set to the default value of (all) buildings, or select a specific building, area, or view.
 - Select a **specific floor**.
 - Select a **specific room type**.
 - Select **Capacity** and then enter a **capacity**.
 - Select **Academic** to limit the search to academic rooms.
 - Select a **Room Availability** option.
 - c. Click **OK**. The Filter Rooms dialog box closes. The room display in the Reservation Book is changed accordingly.
 4. To change the list of rooms that are displayed in the Reservation Book based on a specific room or rooms:
 - a. If the Filter Rooms dialog box is not already open, then above the Rooms list, click **Filter** to open the dialog box and select **Specific Room**.
 - b. Select the room, or CTRL-click to select multiple rooms on the Available list.
 - c. Click the **Move (>)** button to move the selected rooms to the Selected list. The Reservation Book is updated to show bookings only for the selected rooms.
 5. To change the Reservation Book view, from the View dropdown list, select Daily, Weekly, or Monthly.
 6. To change multiple **display options** for a reservation:
 - a. Click **Options** (upper right hand corner of Reservation Book) to open the **Book Options** dialog box (the General tab is the active tab).
 - b. Change multiple display options not only for the Reservation Book, but also a reservation in the book.

Option	Description
Start Hour	The daily start time for the Reservation Book display.
Display	The information that is displayed in the middle bar for a reservation.
Time Display Interval	Changes the granularity of the time display interval.
Maximum Number of Rooms	The maximum number of rooms to display in the Reservation Book.
Booking Colors Based On	The color of the bookings in the reservation. Select one: Status, Event Type, or Check-in Status (for EMS Workplace only.)
Rooms Without Bookings	Whether to highlight rooms without bookings and if so, the highlight color. If both Highlight Rooms and Booked Space Status Only are selected, then only those rooms that do not have a Booked Space status are highlighted.
Room Display	Display the room code or the room name for a reservation.
Building Display	Display the building code or the building name for a reservation.
Go To Today on Startup	If selected, the Reservation Book opens to the current day's date; otherwise, it opens to the last date viewed.
Always Prompt for Room Filter on Startup	If Show '(all)' in Building List is also selected, then when you open the Reservation Book, the Filter dialog box opens on top of the Reservation Book. You can select different options on this dialog box to display only specific reservations in the book, for example, bookings only for selected rooms. If you do not select any options on this dialog box, but instead simply close it, then all reservations for all rooms in all buildings are displayed in the book.
Hide Current Time Indicator	Show or hide the vertical bar that indicates the current time for current day.

Option	Description
	<div style="border: 1px dashed gray; padding: 10px;">  <p>Note: The Current Time indicator is displayed only if the view is the Daily or Weekly view and the view includes the current day's date.</p> </div>
<p>Show 'all' in Building List</p>	<p>Show the "all" option on the Building dropdown list; otherwise, a user must select a specific building. If this option is selected in conjunction with Always Prompt for Room Filter on Startup, then when you open the Reservation Book, then the Filter dialog box always opens on top of the Reservation Book. If you are setting your Reservation Book options, and you do not want to the Filter dialog box to open on top of the Reservation Book when you open the book, then do the following:</p> <ul style="list-style-type: none"> • Clear Always Prompt for Room Filter on Startup. • Clear Show ('all') in Building List. • On the Building dropdown list in the Reservation Book, select any building, area, or view. <div style="border: 1px dashed gray; padding: 10px;">  <p>Note: The building, area, or view that you select is not important. This last step just clears the "all" building option from the Reservation Book cache and ensures that the Filter dialog box does not open on top of the Reservation Book. Going forward, you can always select all buildings, or any specific building, area, or view as needed when you are working in the Reservation Book.</p> </div>
<p>Show Capacity</p>	<p>Show the minimum and maximum capacities next to the room description.</p>
<p>Hide Booking Shadow</p>	<p>Hide the vertical shadow bar that highlights the reserved and/or event start times and end times when a user moves a booking in the Reservation Book.</p>

7. To select which items to include in the **tooltip** that opens when you place the cursor over an event in the Reservation Book:
 - a. Click **Options** (upper-right corner of Reservation Book) to open the Book Options dialog box.
 - b. Open the **Tooltip Display** tab and select which items to include in the tooltip that opens when you rest the mouse pointer on an event in the Reservation Book.

8. To change the display date using the **calendar**:
 - a. From the **Date** field, click the dropdown arrow to open the Calendar.
 - b. Use the (< and >) scroll features at the top of the calendar to change the month or use the (>) scroll features at the top of the calendar to change the year.
 - c. To select a different date for a month, click the date.
9. To change the display date using the Reservation Book **scroll features**:
 - a. Use the scroll features at the top of the reservation book display to scroll to a different day, week, month, or any different combination of these.
 - b. To reset the display immediately to the current day's date, click **Today**.

View Reservation Information

1. On the EMS toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. To view the reservation in the Navigator, double-click the middle bar for the reservation entry or right-click the reservation entry and on the context menu that opens, click **Open**.
3. You can view the reservation information in the following ways:
 - View the **bookings** for a room
 - View the **properties** for a room
 - View the **pricing** for a booked room
 - View the **setup** information, event information, or teardown information for a reservation
4. To view the bookings for a room:
 - a. Click the room name or code in the Rooms list to open the Bookings tab for the Room Info dialog box. The tab on this dialog box lists all the bookings for the selected room based on the current view (Daily, Weekly, Monthly) and on the date that is shown in the Date field.
 - b. To view a booking in the Navigator, select the booking, and then click **Open**.
5. To view room properties:
 - a. Click the **room name** or **code** in the Rooms list to open the Bookings tab for the Room Info dialog box.
 - b. Open the **Room** tab. The tab on this dialog box lists all the properties for the room, such as the room code, the room name, the room classification, etc. It also lists the setup type and capacity for the room, and any notes that have been entered for the room.

6. To view the pricing for a booked room:
 - a. Click the **room name** or **code** in the Rooms list to open the Bookings tab for the Room Info dialog box.
 - b. Open the **Pricing** tab. This tab displays any pricing information that was defined for the room.
7. To view the **room setup** information, event information, or teardown information for a reservation:
 - a. Rest the mouse pointer on the left bar, middle bar, or right bar for the reservation entry. A tooltip showing the respective setup, event, or teardown information opens.
 - b. If buildings that are located in multiple time zones are currently displayed, you can specify the time zone in which to view all of your bookings.

Make a New Reservation

1. On the EMS toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. Change the display to show the room for which you are making the reservation.
3. Select the date for which you are making the reservation.
4. In the Time Grid for the room, click and hold the left mouse button, drag the mouse to schedule the room and time, and then release the mouse button to open the Reservation Wizard. See Also: [Make a Reservation Using the Reservation Wizard](#).


Edit an Existing Reservation

1. On the EMS toolbar, click the **Book** icon. The Reservation Book opens in the Daily view.
2. Optionally, you can do one or more of the following to edit an existing reservation:

Step	Action
Change the setup time for a reservation	<ul style="list-style-type: none"> • Drag the left bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the event time	<ul style="list-style-type: none"> • Drag the middle bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Change the teardown time for a reservation	<ul style="list-style-type: none"> • Drag the right bar horizontally to a new time. • Click Yes in the Confirm Change dialog box.
Edit the reservation building, room, time, or	<ul style="list-style-type: none"> • Drag and drop the reservation to a new room that is the same building or in a different building, and/or to a new time.

Step	Action
both	<ul style="list-style-type: none"> Click Yes in the Confirm Change dialog box.

3. Optionally, you can right-click on a reservation in the Reservation Book, and on the context menu that opens, select one of the following:

Option	Description
Open	Opens a reservation in the EMS Navigator.
Move Forward	Move the reservation date forward by one day or one week.
Move Backward	Move the reservation date backward by one day or one week.
Move to a Specific Date	Move the reservation to a specific date.
Change Status	Change the status of the reservation.
Copy Bookings	<p>N/A</p> <div style="border: 1px dashed gray; padding: 10px; margin-top: 10px;"> <p> Note: Although this option is available on the context menu for a reservation, its associated functionality is currently under development.</p> </div>
Swap Rooms With Another Booking	Swap the room assignments of two events. The swap option is applicable only for two events that have identical meeting patterns.
Highlight Related Reservations	Highlights the bookings that belong to the same reservation.

CHAPTER 94: Troubleshoot an Internal Server Error When Viewing My Events in EMS Web App

If you are getting an internal server error when trying to view existing bookings through the “My Events” page in EMS Web App and there are a large amount of bookings under your name, this is because the number of records returned exceeds the number allowed by the IIS web app configuration. The maximum is set to 50,000 by default.

Workaround: You or your System Administrator can increase this limit by editing the web.config file. The configuration attribute to look for is the following:

```
<add key="aspnet:MaxJsonDeserializerMembers" value="50000" />
```

Change the value to the maximum number of bookings you expect users to have.

**Note:**

EMS Cloud Customers: Modifications to the web.config file must be performed by EMS Cloud Operations. To request these changes, please contact [EMS Support](#).

CHAPTER 95: Understand Everyday User Templates

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. To learn more about these settings, see [Create a Reservation in the EMS Web App](#).

**Note:**

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

See Also: [Configure Everyday User Templates](#).

CHAPTER 96: Skype for Business in the EMS Web App

Everyday Users can now integrate audio/video conferencing tools with EMS applications, starting with Skype for Business. The EMS integration of Skype for Business allows users to easily integrate instant messaging and audio/video conferencing to their meetings without the need for A/V support.



Important!

When considering using the Skype for Business Integration, keep in mind the following:

- Skype for Business is **ONLY** available on **Exchange-enabled templates**.
- **Users cannot edit or remove Skype for Business meetings from their reservations. Users can delete the link, but the Join link will remain enabled.**

For more information about Configuring Skype for Business, see [Configure Skype for Business](#).

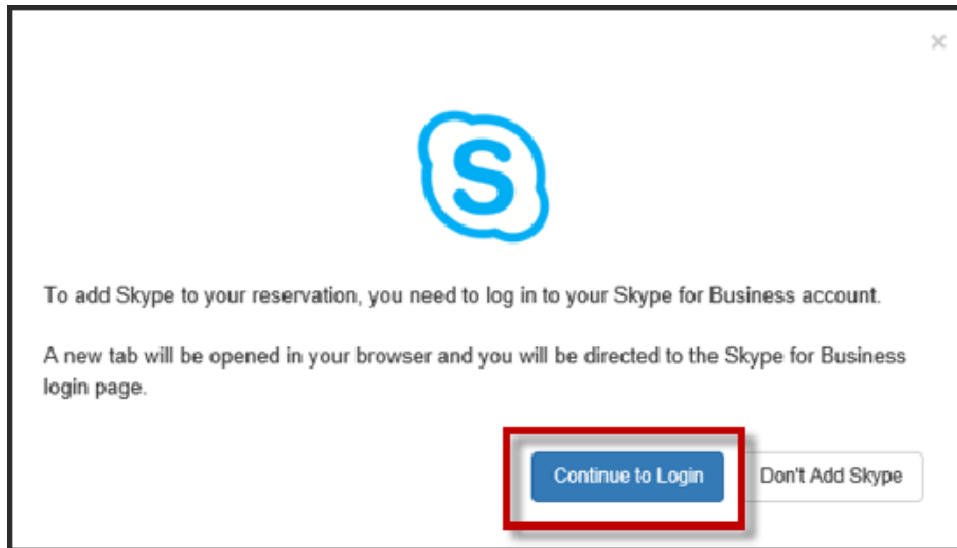
This topic provides information about the following:

- [Add Skype for Business to Your Reservation](#)
- [Join a Skype for Business Meeting from the EMS Web App](#)

Add Skype for Business to Your Reservation

There are multiple ways to add or remove Skype for Business to your reservation.

1. Open and [log into](#) the EMS Web App.
2. Begin [creating your reservation](#).
3. You will see an **Add Skype to Reservation** toggle on both the **Room & Attendees** and **Reservation Details** tabs. From either of these tabs, click the **Add Skype to Reservation** toggle to add Skype for Business to your reservation.
4. If this is your first time adding a Skype for Business meeting in the Web App, a Skype authentication dialog box will appear. Click **Continue to Login**.



Skype Authentication Dialog

5. In the new browser window, enter your email address and password to authenticate your Skype for Business account.
 - If your Skype account is authenticated, you can continue creating your reservation.
 - If your Skype account is not authenticated, an authentication modal will appear.
 - If you fail to authenticate your Skype account, the Skype toggle will be disabled.
6. Once the **Add Skype to Reservation** toggle is set to **On**, a confirmation will appear at the top of the screen indicating that Skype information will be added once you've completed your reservation.

The screenshot shows the 'Room Request' page in the EMS Web App. At the top, a message box says 'Skype information will be added to your reservation after it's created.' Below this, the page is divided into two tabs: '1 Rooms & Attendees' (active) and '2 Reservation Details'. The main content area is titled 'New Booking for Fri Apr 21, 2017'. On the left, there are fields for 'Date' (Fri 04/21/2017), 'Start Time' (9:00 AM), 'End Time' (2:00 PM), and 'Locations' (EMS HQ). A 'Search' button is visible. On the right, there are sections for 'Selected Rooms', 'Attendees' (with a calendar view showing Pat Smith, Pike, Limon, and Mt Evans), and 'Room Search Results'. At the bottom left, there is a toggle switch labeled 'Add Skype to Reservation' which is currently set to 'On', indicated by a red arrow.

Skype Confirmation Message



Note:

The user who created the meeting will be able to view the Skype for Business meeting details (including Skype meeting link and call-in information) from the **Browse Events**, **Browse Locations**, and **Browse People** screens.

Once you have added Skype to your reservation, the meeting attendees will receive an email notification including the Join Skype link and call-in information.

- To remove Skype for Business from your meeting, set the **Add Skype to Reservation** toggle to **Off** from either the Room & Attendees tab or Reservation Details tab. A message will appear at the top of the screen, confirming that Skype information has been removed from your reservation.

Join a Skype for Business Meeting from the EMS Web App

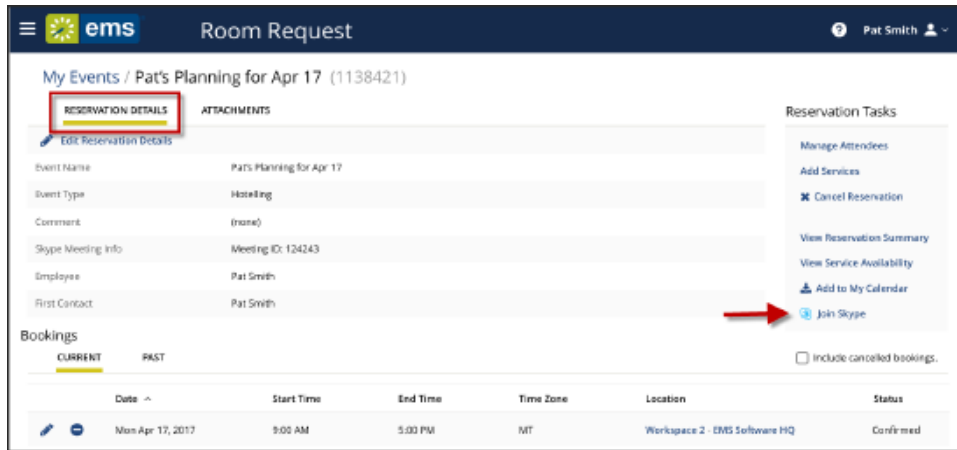


Note:

You can join a Skype for Business meeting that has been added to your reservation from multiple places in the EMS Web App:

- View Reservation
- My Booking Details page

1. From **My Events**, navigate to the **Reservation Tasks** column on the **Reservation Details** tab. Click the **Join Skype** icon to launch your Skype for Business meeting.



Join Skype from Reservation Details Tab

2. From the **Booking Details** page, navigate to the **Event Details** tab. At the bottom of the **Event Details** tab, click the **Join Skype** button to instantly launch your Skype for Business meeting.

EVENT DETAILS		RELATED EVENTS
Event Name	Pat's Planning Meeting (edit)	
Date	Monday Apr 17, 2017	
Event Time	9:00 AM - 5:00 PM MT	
Reserved Time	9:00 AM - 5:00 PM MT	
Location	Workspace 2 - EMS Software HQ	
Skype Meeting Info	Meeting ID: 12532	
Employee	Pat Smith	
1st Contact Phone	720-531-4318	
1st Contact Email	pat.smith@emssoftware.com	
Reservation ID	48312	
Event Type	Meeting	

Add to My Calendar Share Join Skype Close

Join Skype from Event Details Tab

For more information regarding using Skype for Business in other EMS access points, see also:

- [Skype for Business in EMS Mobile App](#)
- [Skype for Business in EMS for Microsoft Outlook](#)

For more information regarding features of Skype for Business, refer to the [Microsoft Skype for Business User Guide](#).

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