

Virtual EMS (VEMS)

Installation, Configuration, and User Guides

V43

April 2019

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Introduction

This document lists the steps you must take to install Virtual EMS. Virtual EMS is an optional, customer-facing web application that makes EMS available online. Virtual EMS provides an online calendar, streamlines the room request process and provides capability to support self-service reservations.

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

Customer Support

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

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

Hardware and Software Requirements

A list of the system requirements for Virtual EMS is maintained on our [website](#).

Obtaining the Latest Release of Virtual EMS

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

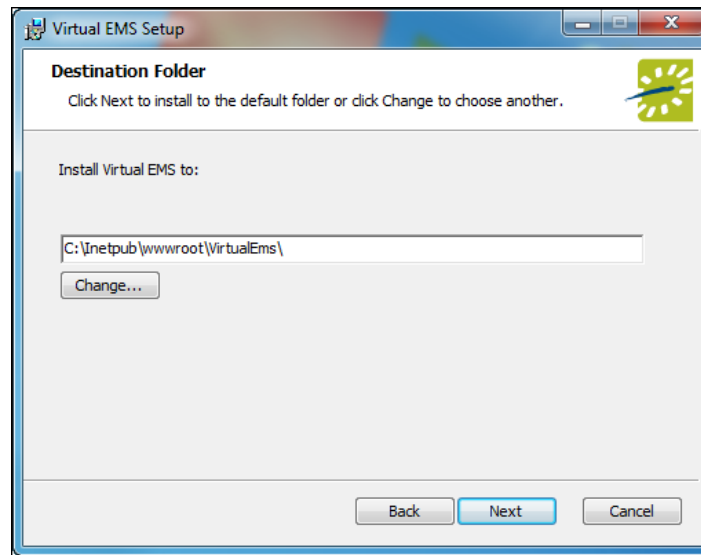
1. Go to www.emssoftware.com and enter your Email Address and Password in the Support Center area.
2. Click the [Software downloads](#) link.
3. Download **Virtual EMS (VirtualEMS.msi)**. Required for both first time installations and upgrades.

Installing/Upgrading Virtual EMS

Important: Before beginning the installation process, please install or upgrade your EMS databases as outlined in the *EMS Installation Instructions*.

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

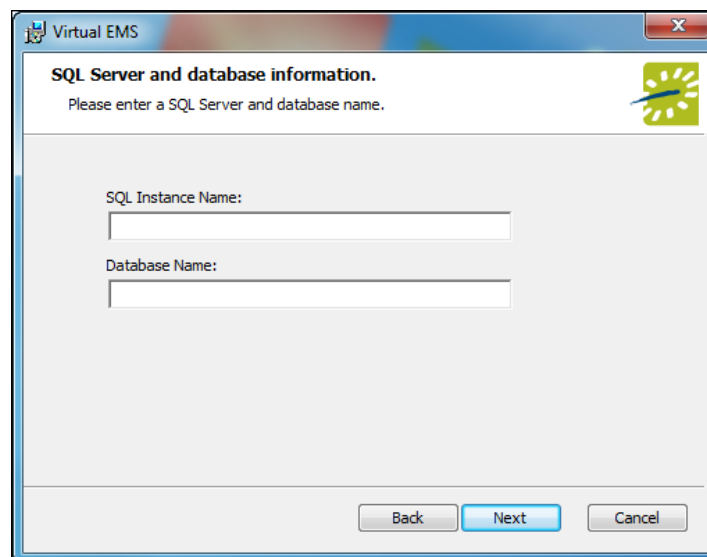
1. Manually **uninstall** any previous versions of Virtual EMS on your web server.
2. Verify that the prerequisite software has been installed.
3. Download the **VirtualEMS.msi** file onto the web server that will be running Virtual EMS.
4. Run **VirtualEMS.msi**.
5. The first screen welcomes you to the Virtual EMS Setup Wizard. Click **Next** to begin the installation process. The *Destination Folder* screen will appear.



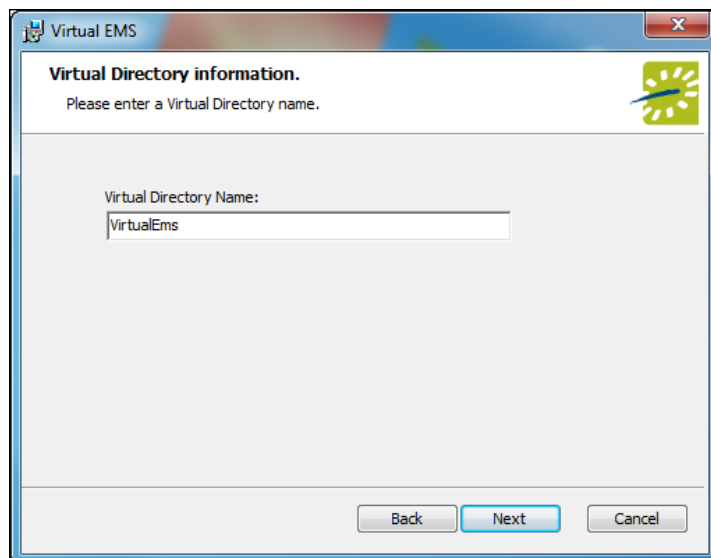
6. Select the destination folder. The installation process will create a new physical directory on your web server based on the destination folder path entered (“Virtual Ems” in the example above.) Click **Next**.

Note: Virtual EMS should not be installed in the same physical directory as other EMS web-based products OR under a site running another version of Virtual EMS.

7. The *SQL Server and database information* screen will appear.

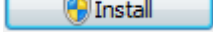


8. Enter your SQL Instance Name.
9. Enter your Database Name:
 - EMS Professional customers – typically named “EMSDData”
 - EMS Workplace, EMS Campus, EMS Enterprise, EMS District and EMS Legal customers - typically named “EMS”
10. Click **Next**.
11. The *Virtual Directory information* screen will appear.



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

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

13. The *Ready to install Virtual EMS* screen will appear. Click  to install Virtual EMS.
14. The *Completed the Virtual EMS Setup Wizard* screen will appear. Click **Finish**.

Starting Virtual EMS

After following the steps above, verify your Virtual EMS installation by opening a browser and entering the Virtual EMS address:

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

The first time you launch Virtual EMS, it may take a few extra moments for the website to display. If you encounter any issues, please contact Customer Support for assistance.

For information on how to configure Virtual EMS, please refer to your *EMS Setup Guide*.

Optional Virtual EMS Modules

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 Virtual EMS that provides single-sign-on capability using Integrated Windows Authentication, your organization’s portal or LDAP. Please refer to the *Integrated Authentication Configuration Instructions* for installation instructions.

Plan-a-Meeting

Plan-a-Meeting is a component for Virtual EMS that integrates with Microsoft Exchange or IBM Lotus Notes. With this module, web users can view the availability of both meeting rooms *and* attendees, and send Microsoft Outlook or IBM Lotus Notes-compatible meeting invitations - all from within Virtual EMS. Please refer to the *PAM Installation Instructions* for installation instructions.

Floor Plan Module

The Floor Plan module allows web users to search for, view and reserve available space from an interactive floor plan within Virtual EMS. Please refer to the *Floor Plan Module Installation Instructions* for installation instructions.

Customizing Virtual EMS

After you have installed Virtual EMS you can customize many aspects of it. You can change the “look and feel” of Virtual EMS by inserting your own logo. Experienced web developers can also modify the system’s style sheet to change fonts and colors. For information on how to configure Virtual EMS, define help text for various pages or re-label menus, please refer to your *EMS Setup Guide*.

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

Logo

The logo that appears in the upper left corner of all pages within Virtual EMS comes from a file named LOGO.GIF, which is found in the \VirtualEMS\Images folder. If you choose to have the system display a different logo, create a new file called CUSTOMLOGO.GIF in that folder. If the system detects this file, it will use it rather than the default 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 Virtual EMS the LOGO.GIF file is overwritten, whereas CUSTOMLOGO.GIF is not.

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. If you create a custom logo file, you may need clear your browser’s cache before you see the new image.

Style Sheets

Experienced web developers are welcome to modify the look and feel of Virtual EMS using a custom style sheet, which controls fonts and colors throughout the application. To do so, name your custom style sheet CUSTOM.CSS and place it in the \VirtualEMS\Styles directory. 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. Create the CUSTOM.CSS style sheet rather than modifying VEMS.CSS, since VEMS.CSS may be overwritten whenever new versions of the software are installed.

Custom Links

The Virtual EMS Browse Events page allows web users to view all public events scheduled in EMS. Users have the option to manually filter this list of events by facility, room, event type, event name or group name. Virtual EMS contains functionality to create a custom Browse Events link (i.e. URL) that when accessed, pre-filters the event listing displayed to a specific building, event type, client, etc. To create a Custom Link, please follow the steps outlined below.

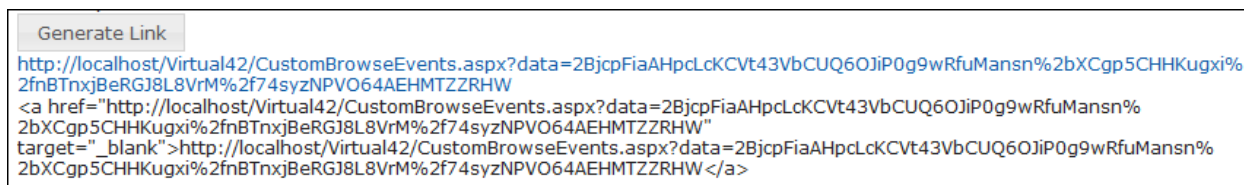
1. Log into Virtual EMS using a web user ID that belongs to a Web Security Template containing the *Web Administrator* Role. For information on how to configure a web user and/or Web Security Template, please refer to your *EMS Setup Guide*.
2. Under the **Admin** menu, click **Generate Custom Link**.

3. Indicate whether or not **Display On Web** settings should be ignored. This setting is available on various configuration items in EMS (e.g. event type, status, etc.) to intentionally hide events from public view.
4. Select your **Filter Type**.
5. The results displayed in the **Select Item** dropdown will reset based on the **Filter Type** selected. Pick a value in the **Select Item** dropdown.
6. Select your **Display Format**.
7. To display a custom logo that is different than the default logo used for your Virtual EMS site, enter the logo name in the **Logo** field. The logo will need to exist within the Virtual EMS physical directory on your web server (typically C:\inetpub\wwwroot\VirtualEMS\).
8. To display a custom title, enter a value in the **Title** field.
9. To collapse booking information so that only the reservation information is displayed, select the **Roll Up To Reservation** option.

*Roll Up To Reservation
Enabled*

*Roll Up To Reservation
Disabled*

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



Custom JavaScript

With custom JavaScript, you can extend the functionality of Virtual EMS to suit your business needs. Please keep in mind that including custom JavaScript on Virtual EMS pages can affect performance.

When VEMS receives a request for a page, it checks for the existence of a **CustomJs** folder. If the folder exists, VEMS checks for any files that match the name of the page. For instance, on the `RoomRequest.aspx` page, if there is a file called **RoomRequest.js** in the CustomJs folder, VEMS will include the `RoomRequest.js` file on the page.

In addition to the name-matched file, VEMS will also check for and include the file named **global.js** on EVERY page. Follow the below steps to enable custom JavaScript

Perform the following steps to enable Custom JavaScript:

- Enable Custom JavaScript. Open the VEMS web.config file (*i.e.*, `C:\inetpub\wwwroot\VirtualEms\web.config`)
 - Locate the following node under the `<appSettings>` node
 - `<add key="allowCustomJs" value="false" />`
 - Change the false value to true
 - Save the file
- Create the `CustomJs` folder within the root of you VEMS Install Directory (*i.e.*, `C:\inetpub\wwwroot\VirtualEms\CustomJs`).

You are now ready to implement your Custom JavaScript. There are a couple of options:

- In the newly created CustomJs folder, create a file for each of the above pages you wish 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. If you include the script in both places, it could cause problems.

Automatic Web User Account Creation

Various configuration settings are available to automatically create Web User records (and assign the appropriate Web Process Template(s) if applicable) when a user hits your Virtual EMS site for the first time. Within the Virtual EMS Parameters area of EMS (*System Administration > Settings > Parameters (Virtual tab)*), the following parameters must be set accordingly:

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

For organizations using Portal authentication, EMS supports a simple account provisioning strategy. When using Auto Create, EMS requires that a web 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 below parameters are meant to help create a more complete web 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>

EMS Workplace, EMS Campus, EMS Enterprise, EMS District, and EMS Legal customers are also able to assign default Web Process Templates when a new Web User account is created. To automatically assign a Web Process Template to new Web Users, select the **Available to New Web Users** option within your Web Process Template(s) (*Configuration > Web > Web Process Templates*).

In EMS Professional, the **Default Security Template for User** parameter shown above is used to assign the correct Web Process Template to new Web User records.

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

Existing Web User Accounts

Warning for Existing EMS Customers: Before activating any Integrated Authentication option, the **Network ID** field or **External Reference** field must be populated on all existing Web User records. Ignoring this step may result in duplicate Web User records.

Integrated Windows Authentication

Overview

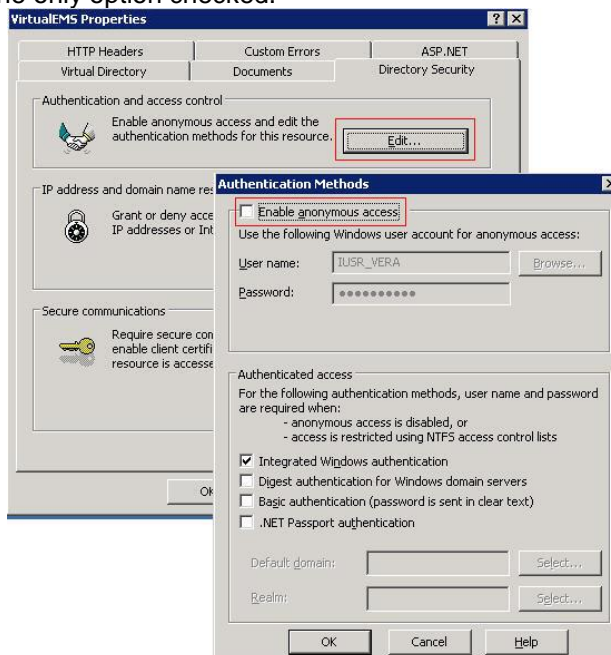
Integrated Windows Authentication (IWA) is a built-in Microsoft Internet Information Services (IIS) authentication protocol that can be used to automatically authenticate and sign-in a user to Virtual EMS. Integrated Windows Authentication works only with Internet Explorer and is best used on intranets where all clients accessing Virtual EMS are within a single domain. For more information, please review the following Microsoft TechNet article on [IWA](#).

When a domain user logged onto a networked PC hits the Virtual EMS site, 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 Web User records. If a match exists, the Web User will be automatically logged-into Virtual EMS.

Note: The **Field Used to Authenticate Web User** Virtual EMS Parameter (within *System Administration > Settings > Parameters (Virtual tab)*) is used by Virtual EMS to determine which value should be used for authentication.

Activating Integrated Windows Authentication for IIS 6.0

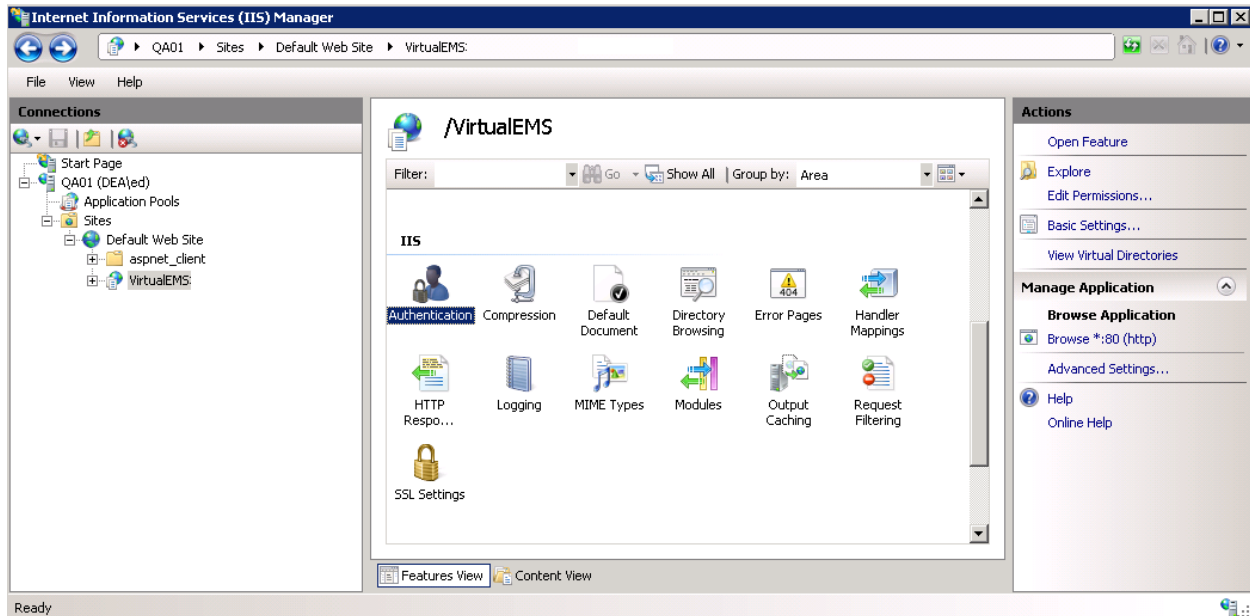
1. On the web server that hosts your Virtual EMS site, open **IIS Manager**.
2. Locate your Virtual EMS web site.
3. Right-click your Virtual EMS site and choose **Properties**. The Properties screen will open.
4. Go to the **Directory Security** tab and click the **Edit** button under the *Authentication and access control* section. The Authentication Methods screen will open.
5. Uncheck the **Enable anonymous access** option. The **Integrated Windows authentication** option should be the only option checked.



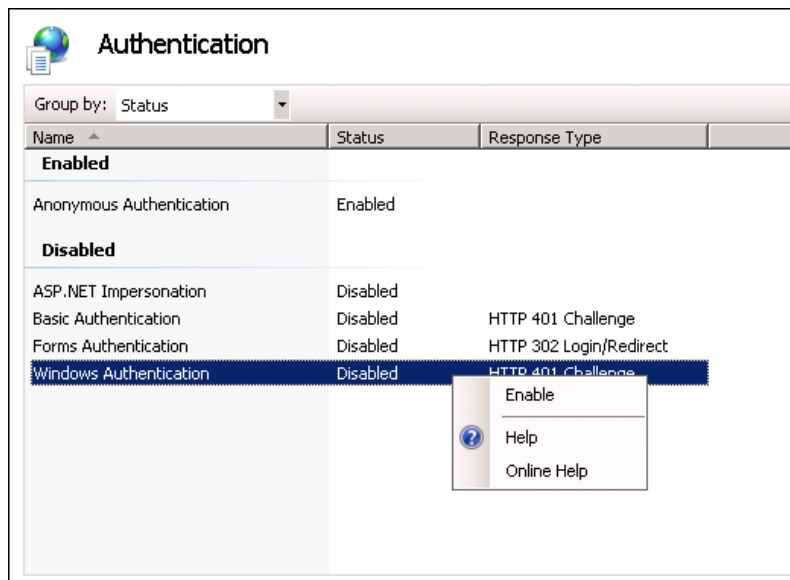
- Click **OK** to exit the Authentication Methods screen. Click **OK** again to exit the Properties screen. You have completed the necessary IIS configuration steps for IIS 6.0.

Activating Integrated Windows Authentication for IIS 7

- On the web server that hosts your Virtual EMS site, open **IIS Manager**.
- Locate and highlight your Virtual EMS web site.



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



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

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 Virtual EMS.

When a user logs-into Virtual EMS 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 Web User records. If a match exists, the Web User will be logged-into Virtual EMS inheriting any Web Process Template rights that their LDAP Group has been assigned to.

Note: The Virtual EMS LDAP-Web 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.

Note: The **Field Used to Authenticate Web User** Virtual EMS Parameter (within *System Administration > Settings > Parameters (Virtual tab)*) is used by Virtual EMS to determine which value should be used for authentication.

Configuration

1. Log-into Virtual EMS with a Web User that belongs to a Web Security Template containing the **Web Administrator** role (*Configuration > Web > Web Security Templates*).
2. Redirect your browser to:

[http://\[ServerName\]/VirtualEMS/LDAPConfiguration.aspx](http://[ServerName]/VirtualEMS/LDAPConfiguration.aspx) (replace [ServerName] with the name of your web server)

3. Go to the **Security** tab.
4. Select the **Authenticate users via LDAP** checkbox to enable LDAP authentication.
5. Select the **Use LDAP to assign Process Templates** checkbox if LDAP will be used to assign Web Process Templates to your Web Users.
6. **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.
7. In the **Path for LDAP Query** field, specify a valid LDAP path (example – LDAP://YourCompany.com)
8. **List of Domains:** Skip this step if your organization uses a single domain. Otherwise, provide a comma separated list of your domains.
9. In the **LDAP Domain\User** field, enter a Domain User account that has rights to query LDAP (example – YourDomain\User)
10. In the **Password** field, enter a valid Password for the User Account entered in the previous step.
11. 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.

12. Click **Save**.

Note: If you want Web Users to inherit Web Process Templates based on the LDAP Group(s) they belong to, proceed to Step #13. Otherwise, you have completed the configuration process.

13. Within EMS, go to the Web Process Templates area (*Configuration > Web > Web Process Templates*).
14. Within a Web Process Template, locate the **LDAP Groups** tab and map the appropriate LDAP Group(s) to that Web Process Template.
15. Click **OK**.

Portal Authentication

Overview

The Portal Authentication method provides Virtual EMS single sign-on capability using your organization's portal (e.g. SiteMinder, Plumtree, uPortal, etc.). When a user logged into your portal accesses Virtual EMS, 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 Web User records. If a match exists, the Web User will be automatically logged-into Virtual EMS.

Note: The **Field Used to Authenticate Web User** Virtual EMS Parameter (within *System Administration > Settings > Parameters (Virtual tab)*) is used by Virtual EMS 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, please see the [Appendix](#).

Installation/Configuration

1. Within the Virtual EMS Parameters area of EMS (*System Administration > Settings > Parameters (Virtual 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 Web User External Reference/Network ID field

2. Direct users to the default Virtual EMS page:

([http://\[ServerName\]/VirtualEMS/Default.aspx](http://[ServerName]/VirtualEMS/Default.aspx) (replace [ServerName] with the name of your web server))

Appendix

Portal Authentication Methods

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.

Code example:

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

Server Variable Method – Federated (SAML)

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.

Steps to Configure

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 configure the VEMS parameter "Portal Authentication Method"
5. In EMS configure the applicable Portal Authentication Variables.

Method 2: Remote Service Provider

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 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 Application 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.

Steps to Configure

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 configure the VEMS parameter "Portal Authentication Method"
5. In EMS configure the applicable Portal Authentication Variables.
6. In EMS Change the Login URL under Configuration>Web>Web Menus
 - a. Select Login.aspx, 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 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 Virtual EMS root web directory. It must be copied there in order for Virtual EMS 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("VEMSSession") = "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 Virtual EMS.

Code example in HTML:

```
<Form name="form1" method="Post" action=" http://[ServerName]/ VirtualEMS/Default.aspx ">
    <input type="hidden" id="VEMSFORM" name="VEMSFORM" 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 Virtual EMS Default.aspx page.

Code example in Active Server Pages 2.0:

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

Getting Started with VEMS

Virtual EMS, or VEMS, 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.

This chapter covers the following topics:

- [“Logging into and out of VEMS”](#)

Logging into and out of VEMS

You can access VEMS through any standard Internet browser.

To log into VEMS

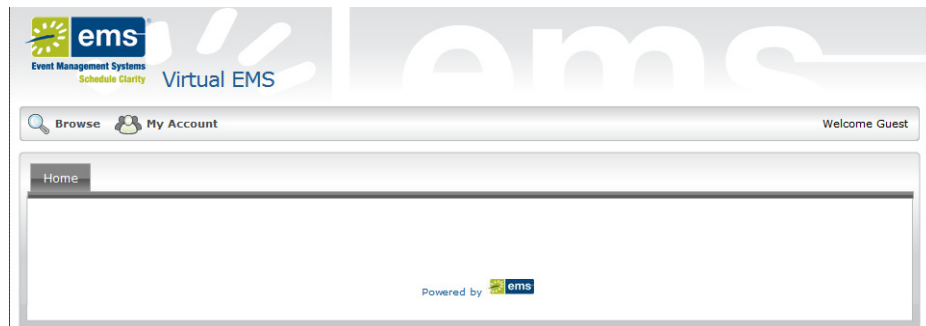
1. Open an Internet browser session.
2. In the browser's address field, enter the VEMS URL.



Contact your EMS administrator if you need assistance.

The VEMS Default page opens.

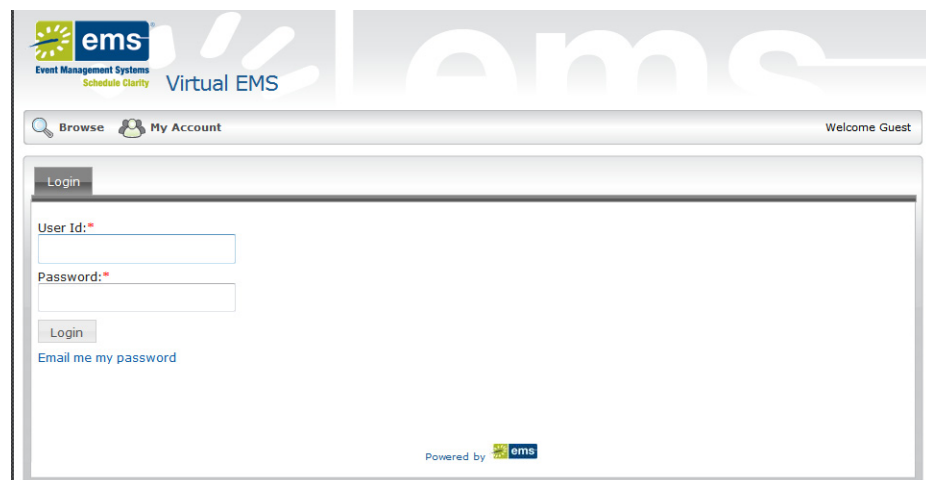
Figure 1-1: VEMS Home page



3. Under My Account, click Log In.

The VEMS Login page opens.

Figure 1-2: VEMS Login page



Getting Started with VEMS

4. In the User ID field, enter your User ID, which is either your network email address or your network User ID.
5. In the Password field, enter your password.



If you do not know your User ID, contact your EMS administrator. If you do not know your password, you can click [Email me my password](#) to have an email that contains your password automatically sent to your network email address.

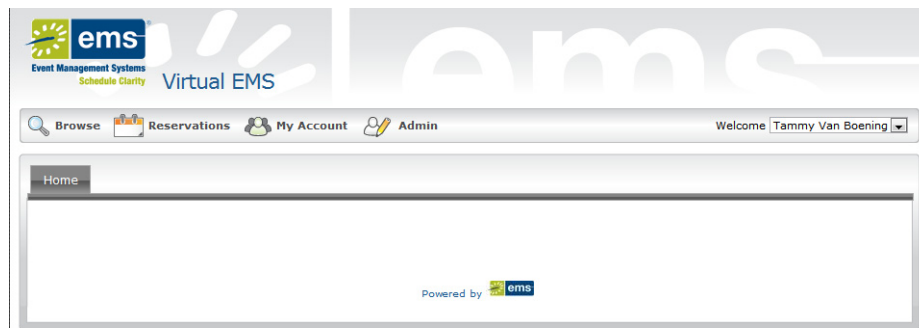
6. Click Login.

The toolbar on the VEMS Default page is updated with the following menu options—Browse, Reservations, My Account, and Admin. The My Account option is also displayed. In the upper right corner of the Default page, Welcome <User Name> is displayed. If you have been granted delegate access to other web users' accounts, then your user name is displayed in a dropdown list along with the names of these web users. You can assume the identity of any of these web users by picking the appropriate name in the dropdown list.



For information about creating a delegate, see [“Creating Delegate Accounts”](#)

Figure 1-3: VEMS Home page



To log out of VEMS

Under My Account, click Log Out.

Browse Menu

The Browse menu for VEMS always contains options for browsing for events, browsing for facilities, browsing for space, and for locating groups. In VEMS, the Browse menu also contains an option for checking in individuals/checking out individuals to/from a building.

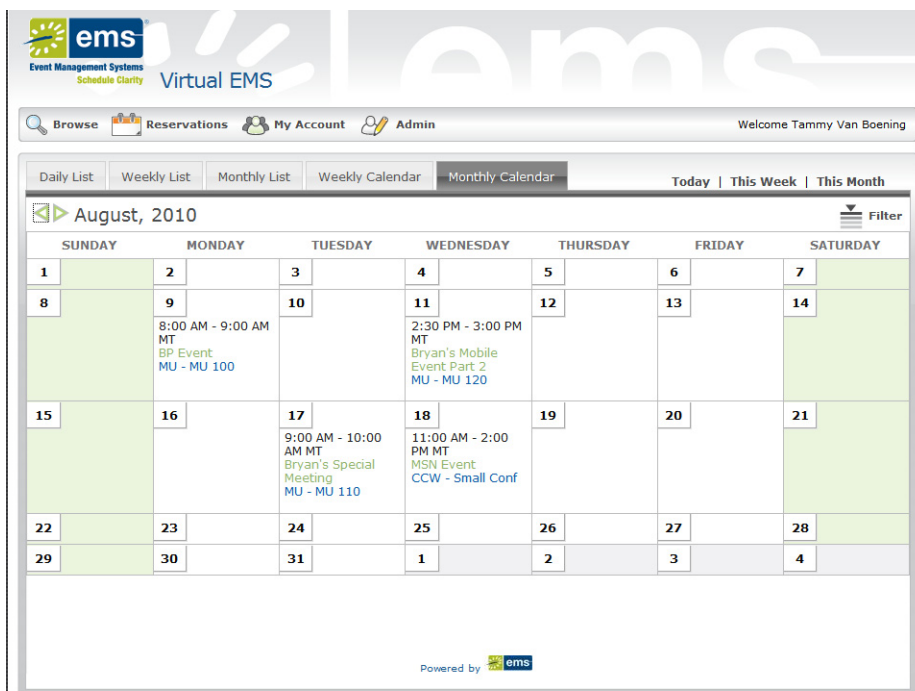
This chapter covers the following topics:

- [“Browsing for Events”](#)
- [“Browsing for Facilities”](#)
- [“Browsing for Space”](#)
- [“Locating a Group”](#)
- [“Checking In Yourself/Checking Out Yourself from a Building \(EMS Workplace\)”](#)

Browsing for Events

The Browse Events page in VEMS displays your organization's EMS events in a daily, weekly, or monthly view. To open the Browse Events page, under Browse, click Browse Events.

Figure 2-1: Browse Events page, Monthly Calendar view



You can do the following on the Browse Events page:

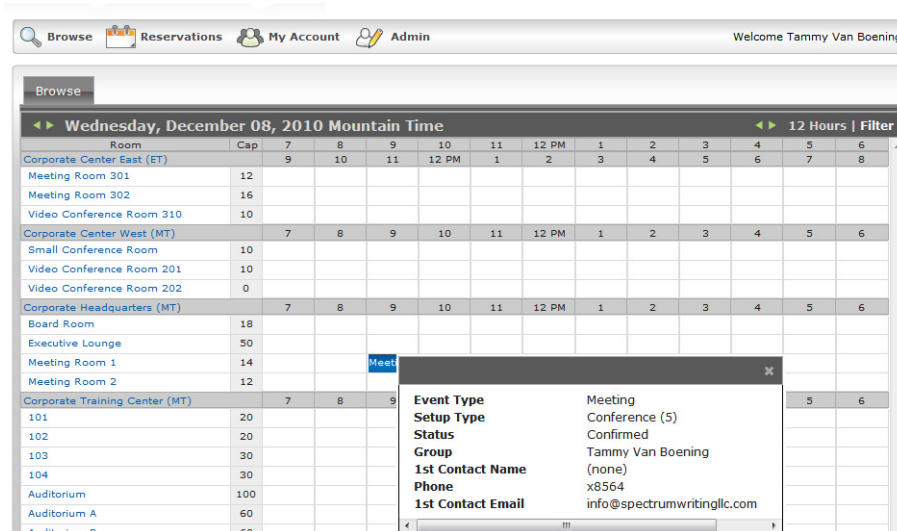
- Change the page view.

Option	Description
Daily List	Events that are scheduled for the current day's date in a list view.
Weekly List	Events that are scheduled for the current week (weeks always begin on a Sunday) in a list view.
Monthly List	Events that are scheduled for the current month in a list view.
Weekly Calendar	Events that are scheduled for the current week (weeks always begin on a Sunday) in a calendar view.
Monthly Calendar	Events that are scheduled for the current month in a calendar view.

Browse Menu

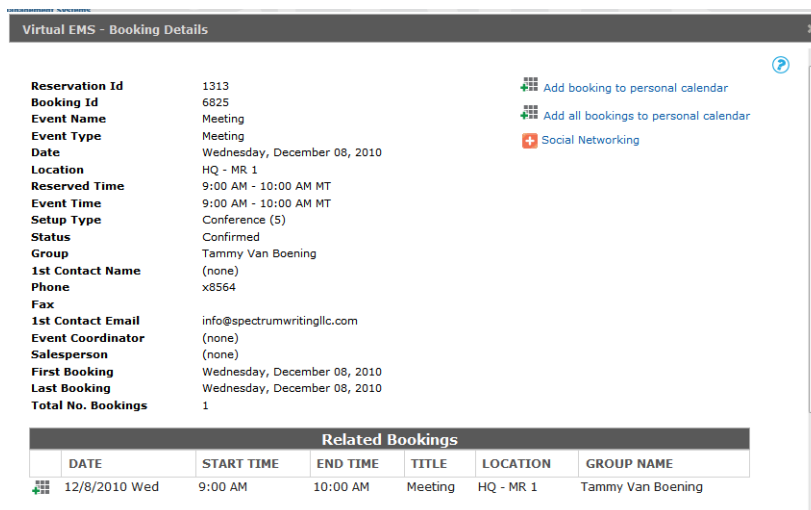
- Place your cursor over the event entry (in a Calendar view) or the event title (in a list view) to open the Event Details popup, which displays information for the event.

Figure 2-2: Event Details popup



- Click the Event Name/Title to open the Booking Details popup. The popup shows reservation details and related bookings. It also contains links for adding the selected booking to your personal calendar, adding all the bookings for the reservation to your personal calendar, and adding the booking to various social networking sites such as Facebook or Twitter.

Figure 2-3: Booking Details popup



- Click the Event Building-Room link to open a Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, availability, any user defined fields configured for the room), and any images that have been associated with the room.

Figure 2-4: Location Details popup

- Click Filter to open a Filters popup, and specify the information that is to be displayed on the Browse Events page.

Figure 2-5: Filters popup

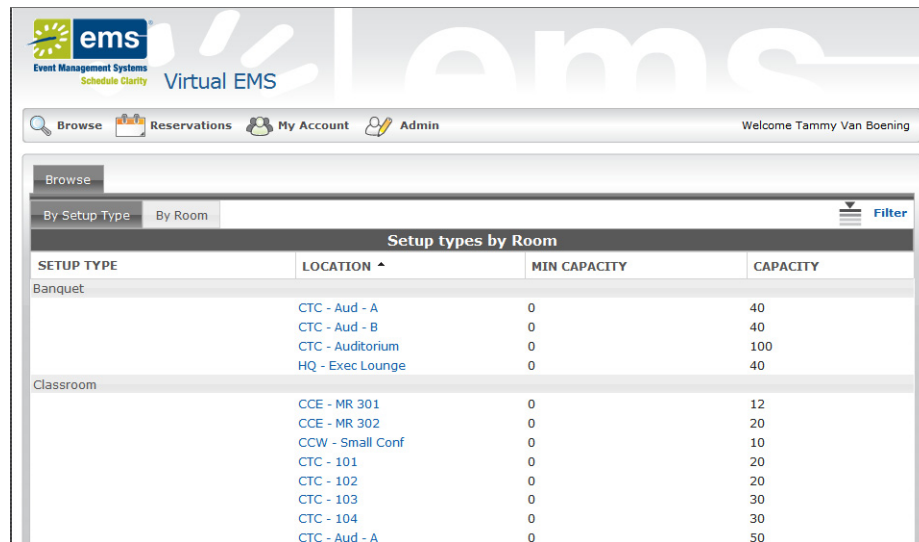


If you select Save, and then click Apply, your filter settings are remembered the next time that you open the Browse Events page.

Browsing for Facilities

The Browse Facilities page displays all the rooms in your organization in which you can schedule an event. The page can display the room in one of two formats—By Setup Type, which is a list of the rooms grouped by setup type or By Room, which is a list of the setup types grouped by room. To open the Browse Facilities page, under Browse, click Browse for Facilities.

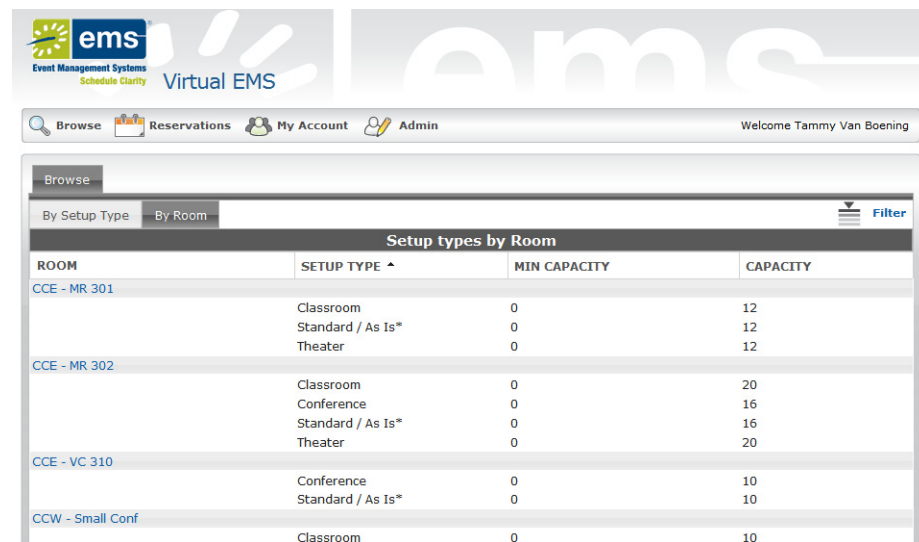
Figure 2-6: Browse Facilities page, By Setup Type



The screenshot shows the Virtual EMS interface. The top navigation bar includes the EMS logo, 'Event Management Systems', 'Schedule Clarity', and 'Virtual EMS'. Below the navigation bar are links for 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is displayed. The main content area is titled 'Browse' and has two tabs: 'By Setup Type' (selected) and 'By Room'. A 'Filter' button is visible. The table is titled 'Setup types by Room' and has four columns: 'SETUP TYPE', 'LOCATION ^', 'MIN CAPACITY', and 'CAPACITY'. The data is grouped by setup type: Banquet and Classroom.

SETUP TYPE	LOCATION ^	MIN CAPACITY	CAPACITY
Banquet	CTC - Aud - A	0	40
	CTC - Aud - B	0	40
	CTC - Auditorium	0	100
	HQ - Exec Lounge	0	40
Classroom	CCE - MR 301	0	12
	CCE - MR 302	0	20
	CCW - Small Conf	0	10
	CTC - 101	0	20
	CTC - 102	0	20
	CTC - 103	0	30
	CTC - 104	0	30
	CTC - Aud - A	0	50

Figure 2-7: Browse Facilities page, By Room

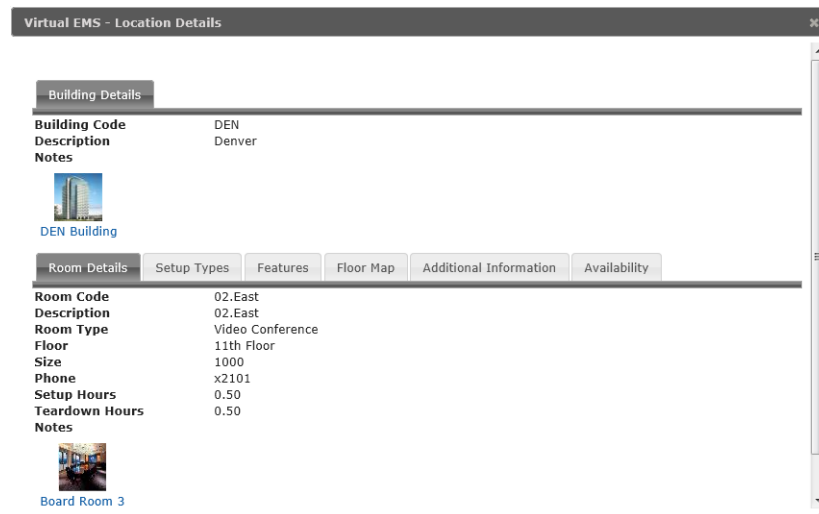


The screenshot shows the Virtual EMS interface. The top navigation bar includes the EMS logo, 'Event Management Systems', 'Schedule Clarity', and 'Virtual EMS'. Below the navigation bar are links for 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is displayed. The main content area is titled 'Browse' and has two tabs: 'By Setup Type' and 'By Room' (selected). A 'Filter' button is visible. The table is titled 'Setup types by Room' and has four columns: 'ROOM', 'SETUP TYPE ^', 'MIN CAPACITY', and 'CAPACITY'. The data is grouped by room: CCE - MR 301, CCE - MR 302, CCE - VC 310, and CCW - Small Conf.

ROOM	SETUP TYPE ^	MIN CAPACITY	CAPACITY
CCE - MR 301	Classroom	0	12
	Standard / As Is*	0	12
	Theater	0	12
CCE - MR 302	Classroom	0	20
	Conference	0	16
	Standard / As Is*	0	16
	Theater	0	20
CCE - VC 310	Conference	0	10
	Standard / As Is*	0	10
CCW - Small Conf	Classroom	0	10

- In either view, you can click the Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

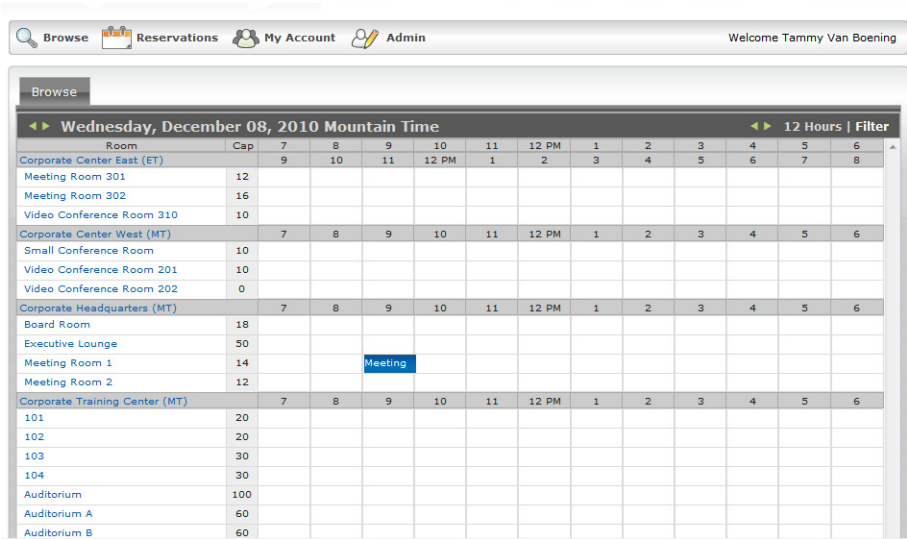
Figure 2-8: Location Details popup



Browsing for Space

The Browse for Space page is a *read-only* page that displays all the rooms in your organization in which you can schedule an event along with the availability information for each room (based on the current day’s date) in a grid view. To open the Browse Space page, under Browse, click Browse for Space.

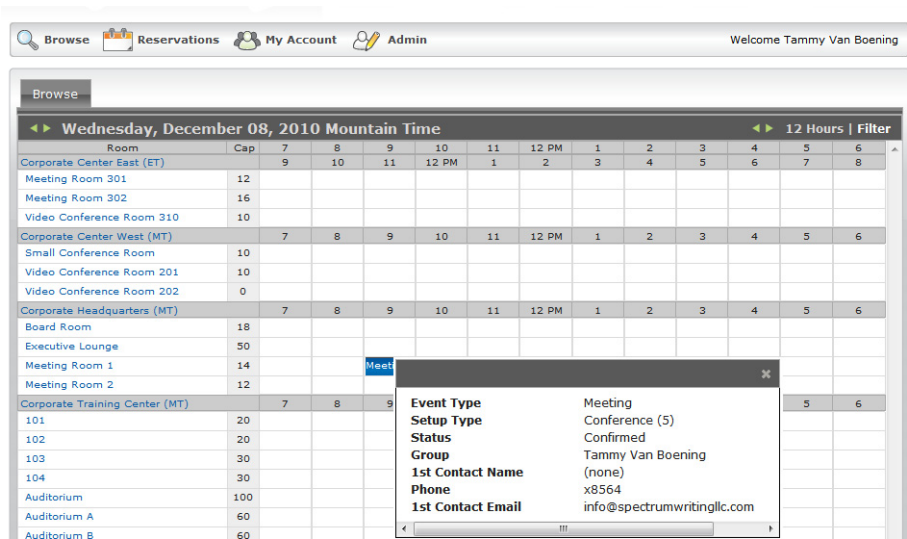
Figure 2-9: Browse for Space page



You can do the following on the Browse for Space page:

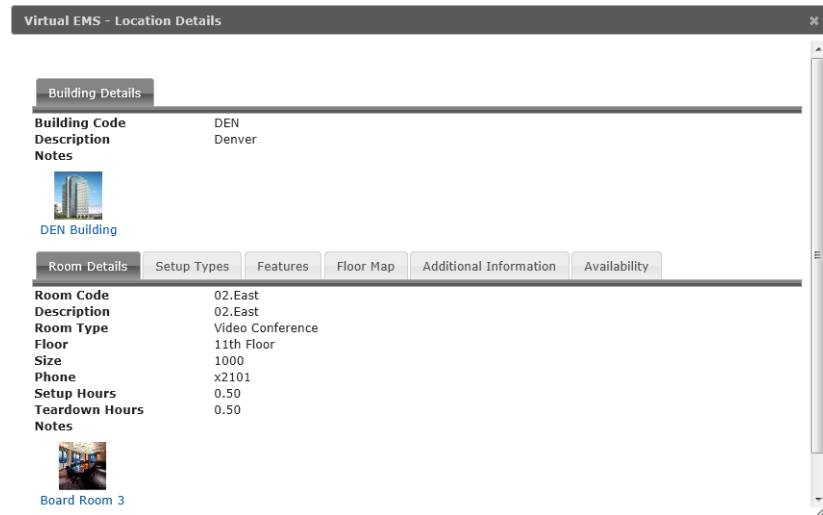
- Place your cursor over an event entry to open the Event Details popup, which displays information for the event.

Figure 2-10: Event Details popup



- Click the Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

Figure 2-11: Location Details popup



Locating a Group


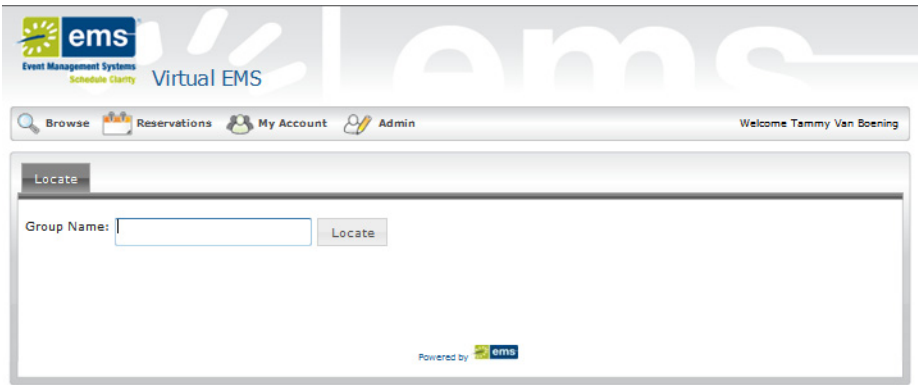
You use the functions on the Locate page to locate a group as well as all the events for the current day's date for which the group is scheduled. In EMS Workplace, the check in/check out status for a group is also displayed on this page. If the group that is displayed on the page is *you*, then you can use the functions that are available to check yourself into or out of a building for an event. In addition, if your organization has purchased and installed the optional Floor Plan Module, then a Floor Plan icon  might be displayed for a building. You can click this icon to open a floor plan for the selected building and view the location of the event's room on the plan. To open the Locate Group page, under Browse, click Locate Group.

Figure 2-12: Locate page



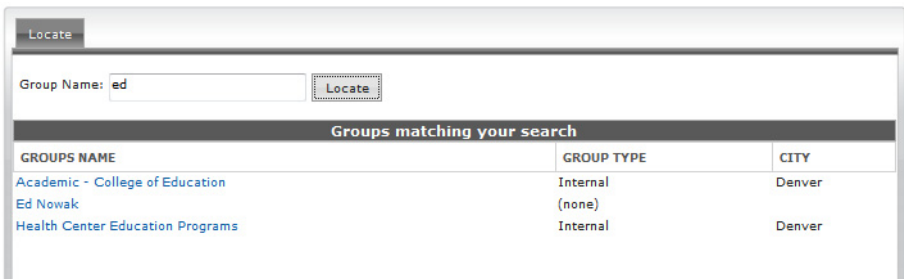
You can do the following on the Locate page:

- To locate *all* groups that have events scheduled for the current day's date, leave the Group Name field blank, and then click Locate.
- To search for a specific group, enter a search string in the Group Name field, and then click Locate. A list of all groups that meet your search criteria is displayed on the page.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **Ed** returns the College of **E**ducation, **Ed** Nowak, and so on.*

Figure 2-13: Locate page with search results



- To view the bookings with the current day's date for which the group is scheduled, click the name of the group in the search results. The Locate page is refreshed with a list of the applicable bookings.

Figure 2-14: Bookings for a selected group

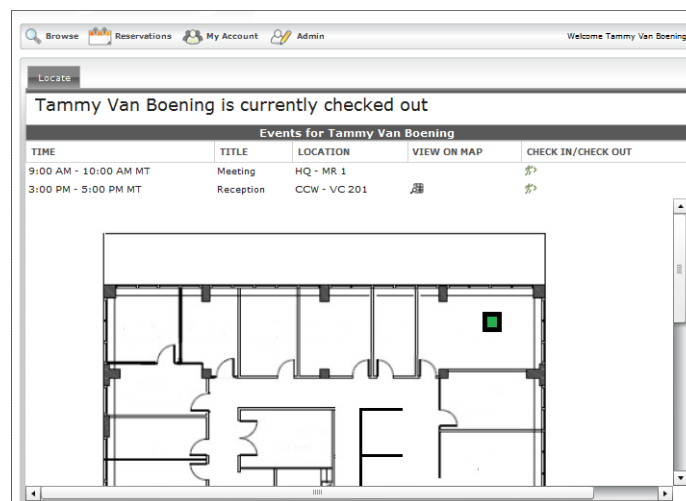


- Click the Floor Plan icon for an event to open to open the floor plan for the event's building and view the location of the event's room on the plan.




Remember, this icon is displayed only if your organization has purchased and installed the optional Floor Plan Module.

Figure 2-15: Viewing the floor plan for an event's building



- In EMS Workplace, if the group that you located is you, then you can do one or both of the following:
 - Click the Check In icon for an event to check the group into the event building.
 - Click the Check Out icon for an event to check the group out of the event building.

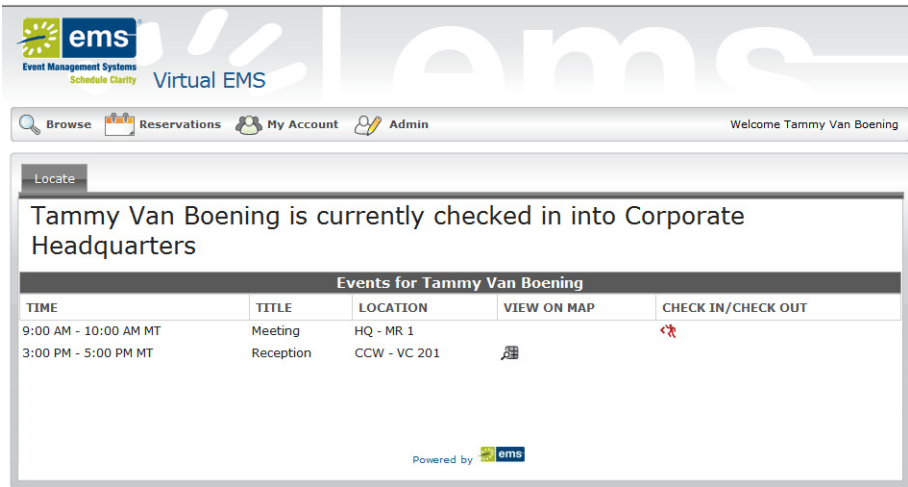
Checking In Yourself/Checking Out Yourself from a Building (EMS Workplace)

The Check In/Check Out page, or Locate page, displays a list of all *your* bookings for the current day's date and it also indicates your check in status—are you not yet checked into a specific building (for an event), are you currently checked into a building, or have you checked out from a building. You can use the options that are available on this page to check yourself into or out of a selected building. In addition, if your organization has purchased and installed the optional Floor Plan Module, then a Floor Plan icon  might be displayed for a building. You can click this icon to open a floor plan for the selected building and view the location of the event's room on the plan. To open the Check In/Check Out page, under Browse, click Check In/Check Out.






The Check In/Check Out option is available on the Browse menu only if your organization has purchased and installed EMS Workplace.

Figure 2-16: Check In/Check Out page



You can do the following on the Check In/Check Out page:

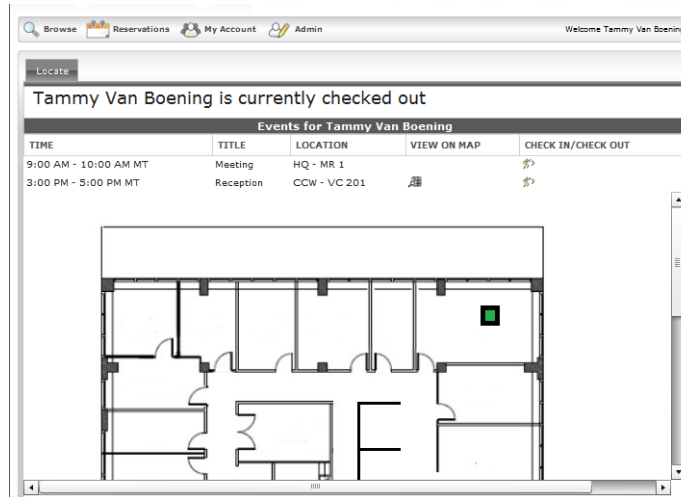
- Click the Check In icon  for an event to check yourself into the building.
- Click the Check Out icon  for an event to check yourself out of the building.

- Click the Floor Plan icon  for an event to open the floor plan for the event's building and view the location of the event's room on the plan.



Remember, this icon is displayed only if your organization has purchased and installed the optional Floor Plan Module.

Figure 2-17: Viewing the floor plan for an event's building



Reservations Menu

The Reservations menu for VEMS contains various options for requesting a space for an event.

This chapter covers the following topics:

- [“Overview of the Reservations Menu”](#)
- [“Submitting a Request for a Space - Booking a Room”](#)
- [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module”](#)
- [“Submitting a Request for Space - An Online Request for a Room”](#)
- [“Requesting Services Only”](#)
- [“Viewing your Requests”](#)
- [“The Reservation Summary Page”](#)

Overview of the Reservations Menu

The Reservations menu contains various options for requesting a space and/or services for an event. Three different types of requests are possible:

- A standard “self-serve” room request that shows real-time room availability in a list or grid view. Based on the rights that your EMS administrator has assigned to your account, you can either reserve rooms and services without approval required or you can request rooms and services with approval required.



An Exchange/Lotus Notes integration option might be available that allows you to add attendees and view their free/busy information during the room request process. In addition, after you submit your reservation, the meeting is added automatically to your calendar and invitations are sent to your attendees. See [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module”](#)



Video conferencing options might also be available.

- A simple online request form that you use to submit a request for a room and services. An EMS reservation coordinator must review requests to confirm actual availability.
- A request to provide services only to a location that is not managed in EMS, for example, an office or off-site location.

Your EMS administrator configures all these request types “behind the scenes,” and the type is not explicitly displayed on the Reservations menu. Instead, it is reflected in the tabs, fields, and functions that are available on the Room Request page, which is the page that opens after you select one of these requests. In addition, the Reservations menu contains an option—View My Requests—for viewing all the requests for space and/or services that you have submitted.

Submitting a Request for a Space - Booking a Room

The Room Request page is organized into various sections to facilitate the [reservation process](#)—a When and Where pane (the left pane of the window) and two tabs—a Location tab and a Details tab.

Figure 3-1: Room Request page, Location tab

The screenshot displays the 'Book a Meeting Room' interface. The top navigation bar includes 'Browse', 'Reservations', 'My Account', 'Admin', and 'Help', with a welcome message for 'Tammy Van Boening'. The main content area is divided into two tabs: 'Location' (active) and 'Details'. The 'When and Where' section on the left contains fields for Date (3/20/2012 Tue), Start Time (8:00 AM), End Time (10:00 AM), Areas (all), Facilities (New York), and Time zone (Eastern Time). Below this is the 'Setup Information' section with Attendance (0) and Setup Type (Conference). The 'Availability Filters' section includes Room Type (all), Floor (all), and Features (Data Projector/Screen, Polycom). A 'Find Space' button is at the bottom of the filters. The 'Location' tab shows 'Selected Locations' with a message 'No rooms currently selected' and buttons for 'List', 'Grid', and 'Floor Map'. The footer indicates 'Powered by ems'.

You enter the information to search for available rooms in the When and Where pane and you view the results of the search on the Location tab. You enter information for the event on the Details tab.

To submit a request for space - booking a room

1. Under Reservations, click a reservation option.

The Room Request page opens.



Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department,” event might have been relabeled “Meeting,” and so on. Required fields are marked with a red asterisk ().*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



Depending on how your EMS administrator has configured your organization's, Room Request template, you might see different fields, or you might not see some of these fields displayed at all.

- Enter your date and time criteria.
- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
- Select a time zone.



Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.

- If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.
3. In the Setup Information section, enter your attendance and setup type.
 4. The Availability Filters section provides options for filtering your room results by Room Type, Floor, and/or Features. (You can click the arrow to expand/collapse this section). If needed, enter additional filter criteria.

5. Click Find Space.

A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the List sub-tab (in a list view), on the Grid sub-tab (in a grid view), and if available, on a Floor Map view. In the List view, rooms that you can reserve are displayed under a “Reserve” heading. Rooms that you can request are displayed under a “Request” heading.



It might be possible to specify the default values for some of these options, including the default view (List or Grid) for the search results. See [“Setting Default Values for Room Requests”](#)



A room that you can “reserve” is automatically booked for the event and no approval is required. A room that you can “request” must be approved by an EMS reservation coordinator.




An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms”](#)

Figure 3-2: Room Request page, List view

The screenshot shows the EMS Room Request page. The left sidebar contains search filters: 'When and Where' (Date: 3/22/2012 Thu, Start Time: 8:00 AM, End Time: 10:00 AM, Areas: (all), Facilities: Denver, Time zone: Mountain Time), 'Setup Information' (Attendance: 10, Setup Type: (no preference)), and 'Availability Filters' (Room Type: (all), Floor: (all), Features: Data Projector/Screen, Polycom). The main area shows 'Selected Locations' with 'No rooms currently selected'. Below this is a table titled 'Availability' with columns: SELECT, AVAILABLE, LOCATION, TIME ZONE, CAPACITY, and PRICE. The table lists two rooms: 'Denver - 02.West' (MT, 16 capacity, 100.00 price) and 'Denver - 02.East' (MT, 10 capacity, 100.00 price). Both are marked as 'Request'.

SELECT	AVAILABLE	LOCATION	TIME ZONE	CAPACITY	PRICE
Request	1/1	Denver - 02.West	MT	16	100.00
Request	1/1	Denver - 02.East	MT	10	100.00

6. Do one of the following to select a room:

- Click the Add icon  next to the room in either the list or grid view.
- Click the Available Room icon for the room in the Floor Map view, and then click Reserve in the Room Details message that opens.



If you are scheduling a video conference, you might be required to specify a host location. If this option is available when you add a room to the booking, the room is automatically selected as the video conferencing host. After you add all the needed rooms, you can select the appropriate room to be the video conferencing host. You can select only one room per building. You might also have the option of specifying the setup count for each room.



Depending on how your EMS administrator has configured the room, an alert might open when you select the room. After you read the alert, click OK to close the alert and continue with room selection.

The following results are possible:








- If you select a location that is available for all the event dates, then the selected location is displayed at the top of the Location tab. Continue to [Step 7](#).

Figure 3-3: Selected room displayed on Location tab

Location

Details

Selected Locations

	DATE	HOLIDAYS	START 	END	LOCATION	STATUS	SETUP COUNT	CONFLICT
	7/3/2012 Tue		8:00 AM	10:00 AM	Denver - 02.West	Request	<input type="text" value="10"/>	
	7/10/2012 Tue		8:00 AM	10:00 AM	Denver - 02.West	Request	<input type="text" value="10"/>	
	7/17/2012 Tue		8:00 AM	10:00 AM	Denver - 02.West	Request	<input type="text" value="10"/>	
	7/24/2012 Tue		8:00 AM	10:00 AM	Denver - 02.West	Request	<input type="text" value="10"/>	
	7/31/2012 Tue		8:00 AM	10:00 AM	Denver - 02.West	Request	<input type="text" value="10"/>	

List

Grid

Floor Map

- If you select a location that is not available for all the event dates, then a message opens indicating this. Click OK to close the message and return to the Location tab. The selected location is displayed at the top of the Location tab and an option to search remaining dates is displayed at the bottom of the When and Where pane. Use this option as needed to fulfill all the event dates, and then continue to [Step 7](#).

Figure 3-4: Option to search for additional rooms

Availability Filters

Room Type:

(all)

Floor:

(all)

Features:

☐ Data Projector
 ☐ Polycom

Find Space

Search Remaining Dates

7. Optionally, do one or both of the following; otherwise, continue to [Step 8](#).
 - Click the name of any room that you selected for the event to open the Location Details popup, and then open the Availability tab on this popup to view the room's availability in either a Daily or Weekly view.
 - In the Availability grid, click and hold the left mouse button, drag the mouse to schedule the room for another date and time on a selected day, and then release the mouse button to select the room.



You can schedule only one day at a time on the Availability tab. You cannot multi-select days. As you drag the mouse, the cursor changes to a double-headed arrow and a blue vertical bar is displayed.


8. Click the option that indicates you have read and agree to the Terms and Conditions for reserving the room, and then click Continue.

The Details tab opens. You use the options on this page to enter the event details.

Figure 3-5: Room Request page, Details tab


9. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (*). At minimum, you must enter the event name, the event type, and the group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.
- You might have the option of attaching files to the room request. If so, then an Attachments section is displayed on the Details tab. The allowed file attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.
- You might have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.



Depending on how your EMS administrator has configured the service, an alert might open when you select the service. After you read the alert, click OK to close the alert and continue with adding the event details.

- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

10. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page”](#)



Depending on how your EMS administrator has configured your EMS implementation, when the Reservation Summary page opens after you submit a reservation request, a Reservation Summary email might be automatically generated and sent to you.

Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module

The optional Plan a Meeting (PAM) module integrates VEMS application with your email system (Microsoft Exchange or Lotus Notes). If PAM is available, then you can find available rooms and add attendees for a meeting. Moreover, invitations are automatically sent to the attendees when you submit the reservation in VEMS. The Room Request page is organized into various sections to facilitate the [reservation process](#)—a When and Where pane (the left pane of the window) and two tabs—a Location tab and a Details tab.

Figure 3-6: Room Request page, Location tab

The screenshot displays the 'Room Request' page in the 'Location' tab. The left pane, 'When and Where', contains fields for 'Add to Calendar/Send Invitations', 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Eastern Time), 'Areas' ((all)), and 'Facilities' ((all)). Below this is the 'Setup Information' section with 'Attendee' (5), 'Setup Type' (Conference), and a 'Find Space' button. The 'Availability Filters' section includes 'Room Type' ((all)), 'Floor' ((all)), and 'Features' (Data Projector, Polycom, VC Equipment). The right pane, 'Selected Locations', shows 'No rooms currently selected' and a calendar for 'Wednesday, December 15, 2010 Eastern Standard Time' with a 16-hour view. Below the calendar is a table of attendees:

SELECT	DISPLAY NAME	EMAIL	JOB TITLE
<input checked="" type="checkbox"/>	Mike O'Shea	Mike.O'Shea@dea.com	Lead Specialist
<input checked="" type="checkbox"/>	Mike Wimet	mike@dea.com	Programmer

A 'Continue' button is located at the bottom of the page.

You enter the information to search for available rooms and attendees in the When and Where pane and you view the results of the search on the Location tab. You enter information for the event on the Details tab.

To submit a request for space - booking a room with the PAM module

1. Under Reservations, click a reservation option.

The Room Request page opens.



Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, "group" might have been relabeled to "client," "employee," or "department," event might have been relabeled "Meeting," and so on. Required fields are marked with a red asterisk ().*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



Depending on how your EMS administrator has configured your organization's, Room Request with PAM template, you might see different fields displayed, or you might not see some of these fields displayed at all.

- Enter your date and time criteria.
- Select a time zone.



Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.

- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
- If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.

3. In the Setup Information section, enter your attendance and setup type.

- The Availability Filters section provides options for filtering your room results by Room Type, Floor, and/or Features. (You can click the arrow to expand/collapse this section). If needed, enter additional filter criteria.



An option might be available to specify default values for one or more of these options in any section in this pane. See [“Setting Default Values for Room Requests”](#)

- Click Find Space.

A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the List sub-tab (in a list view), on the Grid sub-tab (in a grid view), and if available, on a Floor Map view. In the List view, rooms that you can reserve are displayed under a “Reserve” heading. Rooms that you can request are displayed under a “Request” heading.



A room that you can “reserve” is automatically booked for the event and no approval is required. A room that you can “request” must be approved by an EMS reservation coordinator.



An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms”](#)

Figure 3-7: Room Request page, List view of search results


The screenshot shows the EMS Room Request page. The top navigation bar includes links for Browse, Reservations, My Account, Admin, and Help, along with a welcome message for Tammy Van Boening. The main content area is titled "Book a Meeting Room" and is divided into two tabs: "Location" and "Details". The "Location" tab is active, showing a "Selected Locations" section with a message "No rooms currently selected" and buttons for "List", "Grid", and "Floor Map". Below this is an "Availability" table with columns: SELECT, AVAILABLE, LOCATION, TIME ZONE, CAPACITY, and PRICE. The table lists two rooms under the "Request" heading: "Denver - 02.West" (MT, 16 capacity, 100.00 price) and "Denver - 02.East" (MT, 10 capacity, 100.00 price). On the left side of the page, there are several sections for filtering and setup: "When and Where" (Date, Start Time, End Time, Areas, Facilities, Time zone), "Setup Information" (Attendance, Setup Type), and "Availability Filters" (Room Type, Floor, Features). A "Find Space" button is located at the bottom of the filters section.

SELECT	AVAILABLE	LOCATION	TIME ZONE	CAPACITY	PRICE
Request	1/1	Denver - 02.West	MT	16	
	1/1	Denver - 02.East	MT	10	100.00

6. Optionally, do one or both of the following; otherwise, continue to [Step 7](#).
 - Click the name of any room that you selected for the event to open the Location Details popup, and then open the Availability tab on this popup to view the room's availability in either a Daily or Weekly view.
 - In the Availability grid, click and hold the left mouse button, drag the mouse to schedule the room for another date and time on a selected day, and then release the mouse button to select the room.



You can schedule only one day at a time on the Availability tab. You cannot multi-select days. As you drag the mouse, the cursor changes to a double-headed arrow and a blue vertical bar is displayed.

7. In the Find Attendee field, enter a search string, and then click the Search icon .

All the users and distribution groups in your global address list and personal contact list with names that meet the search criteria are displayed on the Location tab. At the top of the tab, the real-time free/busy schedules for all the attendees (including yours) are displayed.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns **Ed** Smith, **Ted** Wilson, and so on.*



Click a distribution group name to explode the group into its individual members.

8. Click the Add icon  next to each attendee whom you are inviting to the meeting.


9. Click Find Space.

A combination of the invited attendees' free/busy schedule (as pulled directly from the attendees' email system) and room information that meets the room search criteria is displayed.

Figure 3-8: Room Request page, Grid view of search results

The screenshot shows the EMS Room Request page. The left sidebar contains sections for 'When and Where' (with date, time, and location filters), 'Setup Information' (with attendance and setup type), and 'Availability Filters' (with room type, floor, and features). The main area is titled 'Book a Meeting Room' and has tabs for 'Location' and 'Details'. The 'Location' tab is active, showing a 'Selected Locations' section with a calendar grid for Wednesday, December 15, 2010. The grid displays the availability of rooms for attendees: Ed Nowak, Mike Wimet, and Sean Nelson. The 'Grid' view is selected, showing a table of rooms and their availability. The table has columns for Room, Cap, and a 24-hour grid. The '02.West' room is highlighted with a blue bar indicating it is unavailable for the entire day.

10. Do one of the following to select a room:

- Click the Add icon  next to the room in either the list or grid view.
- Click the Available Room icon for the room in the Floor Map view, and then click Reserve in the Room Details message that opens.

The selected location is displayed at the top of the Location tab.



When you book a recurring meeting using PAM, a specific room might not be available for all the dates requested. These dates are displayed at the top of the Location tab in an "Unavailable" status. You can find an available room for these dates after you submit your reservation.

11. Open the Details tab opens.


Figure 3-9: Room Request page, Details tab

The screenshot shows the 'Room Request' page with the 'Details' tab selected. The page is organized into several sections:


- When and Where:** Includes fields for 'Add to Calendar/Send Invitations', 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Mountain Time), 'Areas' ((all)), and 'Facilities' (Denver).
- Meeting Details:** Includes 'Meeting Name' (Meeting), 'Meeting Type' (Meeting - Internal), and 'Meeting - Internal'.
- Calendaring Details:** Includes 'Subject', 'Show Time As' (Busy), 'Reminder' ((none)), and 'Message'.
- Setup Information:** Includes 'Attendance' (5), 'Setup Type' ((no preference)), and 'Find Attendee' (se).
- Employee Details:** Includes 'Employee' (Nowak, Edward J.), '1st Contact' (Nowak, Edward J.), '2nd Contact' ((none)), 'Phone', 'Fax', and 'Email' (ed@dea.com).
- Availability Filters:** Includes 'Room Type' ((all)), 'Floor' ((all)), and 'Features' (Data Projector, Polycorn).
- Billing Information:** Includes 'Cost Center Number' (44,444).

12. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (*). At minimum, you must enter the event details (name and event type).
- You specify the appointment information in the Calendaring Details section. You can also click Attach Files to attach files to the meeting invitation.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.

Reservations Menu

- You might have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

13. Click Submit Reservation.

- The appointment is added to your personal calendar and meeting invitations are automatically sent to the meeting attendees. The appointment form contains two embedded links (one for the organizer and one for an attendee) to access the reservation in VEMS. See [Figure 3-10](#) below.



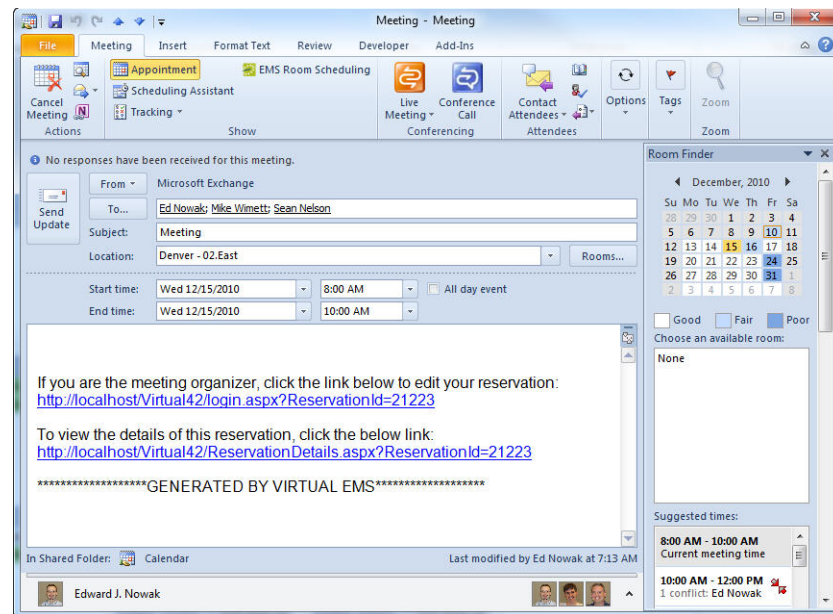
From this point forward, you must make all booking changes in VEMS. If you modify or cancel a meeting that was originally created using the PAM feature within VEMS from your personal calendar, the meeting will not be reflected correctly in VEMS.

- The Reservation Summary page opens. See [“The Reservation Summary Page”](#)



For a reservation containing multiple bookings (a recurring meeting), resolve any room conflicts using the booking tools outlined on the Reservation Summary page. See [“The Reservation Summary Page”](#)

Figure 3-10: Example of an automatically generated email



Submitting a Request for Space - An Online Request for a Room

The Room Request Form page is organized into various sections to facilitate the online [request process](#)—a When and Where pane (the left pane of the window) and two tabs—a Details tab and an Availability tab.

Figure 3-11: Room Request Form page, Details tab

The screenshot shows the 'Training Center Request Form' with the 'Details' tab selected. The form is divided into several sections:

- When and Where:** Includes fields for Date (3/22/2012 Thu), Start Time, End Time, Time zone (Central Time), Areas (all), and Facilities (no preference). A 'Check Availability' button is at the bottom.
- Meeting Details:** Includes Meeting Name (Training) and Meeting Type (Training).
- Group Details:** Includes Group, 1st Contact (Tammy Van Boening), Phone (x4321), Fax, and Email (info@spectrumwritingllc.com).
- Other Information:** Includes a checkbox for 'Have you used these facilities before?'.
- Multimedia & Equipment:** Includes checkboxes for '(none)' and 'AV Items', and a checkbox for 'I have read and agree to the terms and conditions View'.

A 'Submit Reservation' button is located at the bottom of the form. The footer indicates 'Powered by ems'.

You enter the information to search for available rooms in the When and Where pane. You view the results of the search on the Availability tab, and from this information, you can determine if the room that you want is available, or if you must request another room. You enter information for the event on the Details tab.

To submit a request for space - an online request for a room

1. Under Reservations, click a reservation option.

The Room Request page opens.



Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department,” event might have relabeled “Meeting,” and so on. Required fields are marked with a red asterisk ().*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



Depending on how your EMS administrator has configured your organization’s Room Request template, you might see different fields, or you might not see some of these fields displayed at all.

- Enter your date and time criteria.
- Select a time zone.



Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.

- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
 - If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.
3. In the Setup Information section, enter your attendance and setup type.

4. Click Check Availability.

Depending on how your EMS administrator has configured the web template, two results are possible:

- A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the Available tab. From this information, you can determine if the room that you want for the meeting is available, or if you must request another room.
- A message opens indicating that you have violated a booking rule such as the last allowed booking date. Click OK to close the message and refine your search until a list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the Available tab. From this information, you can determine if the room that you want for the meeting is available, or if you must request another room.

Figure 3-12: \Request Room Form page, Availability tab

The screenshot shows the 'Training Center Request Form' with the 'Availability' tab selected. The left sidebar contains search criteria: Date (3/20/2012 Tue), Start Time (6:00 PM), End Time (7:00 PM), Time zone (Mountain Time), Areas ((all)), and Facilities (Denver). A 'Check Availability' button is at the bottom of the sidebar. The main area displays a table of available rooms.

Select	Available	Location	Time zone	Capacity	Price
<input checked="" type="checkbox"/>	1/1	Denver - 02.120	MT	1	100.00
<input checked="" type="checkbox"/>	1/1	Denver - 02.114	MT	1	
<input checked="" type="checkbox"/>	1/1	Denver - 02.West	MT	16	
<input checked="" type="checkbox"/>	1/1	Denver - 02.East	MT	10	100.00
<input checked="" type="checkbox"/>	1/1	Denver - 02.113	MT	1	
<input checked="" type="checkbox"/>	1/1	Denver - 02.110	MT	1	100.00
<input checked="" type="checkbox"/>	1/1	Chicago - Team Training Room	CT	60	
<input checked="" type="checkbox"/>	1/1	Denver - 02.112	MT	1	
<input checked="" type="checkbox"/>	1/1	Denver - 02.111	MT	1	100.00

A 'Submit Reservation' button is located at the bottom of the form. The footer indicates 'Powered by EMS'.

- Optionally, click a Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

Figure 3-13: Location Details popup

- Open the Details tab.

Figure 3-14: Room Request Form page, Details tab

7. Enter the information for the event:

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (*). At minimum, you must enter the event name, the event type, and group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room. These questions are displayed in an Other Information section.
- You might have the option of booking specific resources and/or services for the event. If so, an appropriate section is displayed. For example, if you have the option of booking Multimedia Equipment, then a Multimedia Equipment section is displayed on the tab.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

8. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page”](#)

Requesting Services Only

When you [request](#) services only for a location that is not managed in EMS, then the Services Only Request page opens with a When and Where pane (the left pane of the window) and two tabs—a Service Availability tab and a Details tab.

Figure 3-15: Services Only Request page, Service Availability tab

The screenshot shows the 'Service Only Request' page in the Virtual EMS system. The page has a header with the EMS logo and a navigation bar with links for Browse, Reservations, My Account, and Admin. The main content area is divided into two panes. The left pane, titled 'When and Where', contains fields for Date (12/9/2010 Thu), Start Time, End Time, and Recurrence. Below this is the 'Setup Information' section with an Attendance field set to 0. The 'Location Details' section includes a Building dropdown menu (set to Corporate Headquarters) and a Location text field. A 'Get Services' button is at the bottom of the left pane. The right pane, titled 'Service Availability', shows a list of services: Audio Visual (must be submitted at least 0 hour(s) prior to the start of the booking) and Food Service (must be submitted at least 0 hour(s) prior to the start of the booking). There is a checkbox for 'I have read and agree to the terms and conditions' with a 'View' link. A yellow 'Continue' button is at the bottom of the right pane.

You enter the information for this location in the When and Where pane. The Service Availability tab lists the available services that you can request for the location. You enter information for the event on the Details tab.

To request services only

1. Under Reservations, click a reservation option.

The Services Only Request page opens.



Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department.” Required fields are marked with a red asterisk ().*



Depending on how your EMS administrator has configured your organization's Services Only Request template, you might see different fields displayed, or you might not see some of these fields displayed at all.



It might be possible to specify the default values for some of these options. See [“Setting Default Values for Room Requests”](#)

2. In the When and Where (left) pane of the page, enter your date and time criteria.
3. In the Setup Information section, enter your attendance.
4. On the Buildings dropdown list, select the building, and then in the Location field, enter the location (room) in the building for which you are requesting services.
5. Click Get Services.

The Details tab opens.

Figure 3-16: Services Only Request page, Details tab

ems
Event Management Systems
Schedule Clarity

Browse Reservations My Account Admin Help Welcome Tammy Van Boening

Services Only Request

Service Availability Details

When and Where

Date: 3/21/2012 Wed Recurrence
Start Time: 8:00 AM End Time: 10:00 AM
Attendance: 10
Location Details
Building: Chicago
Location: Tea Room
Get Services

Meeting Details

Meeting Name: Meeting Type:
Group Details
Group: Evans, Dean
1st Contact: Montoya, Julie
Phone: Fax:
Email: julie.montoya.deax.com
2nd Contact: (none)
Phone: Fax:
Email:

Attachments

Attach File

Catering Terms and Conditions

Start Time: End Time: Service Type: Delivery Service Estimated Count:
Breakfast
Hot Breakfast
From the Bakery
Beverage
Center of the Plate Salads
Stack & Wrapped Selections
Plated Affairs
Party Trays

Multimedia & Equipment

(none)
AV Items



Billing Information

Cost Center Number: 22.2222 Department Code:
Submit Reservation

Powered by ems

6. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (*). At minimum, you must enter the event name, the event type, and the group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.
- You might have the option of attaching files to the room request. If so, then an Attachments section is displayed on the Details tab. The allowed file attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.
- One or more resource/services sections will be displayed, depending on the number and type of services that were available to you. You must specify the information for the *appropriate* services for the booking. You do not have to specify information for a resource/service if you do not want to request the service for the booking.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

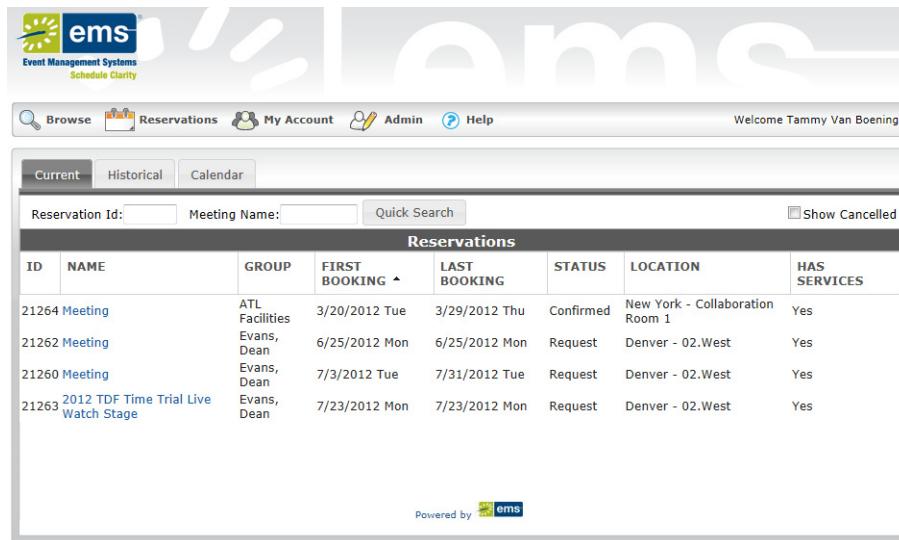
7. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page”](#)

Viewing your Requests

The Reservations menu provides an option for all the requests for spaces and/or services that you have ever made in VEMS. You can select a specific request from this page for more detailed viewing and for editing if needed. To open the Requests page, under Reservations, click View My Requests. When the page first opens, the Current tab is the active tab. This page lists all your requests that have an event start date that is greater than or equal to the current day's date.

Figure 3-17: Requests page, Current tab



ID	NAME	GROUP	FIRST BOOKING	LAST BOOKING	STATUS	LOCATION	HAS SERVICES
21264	Meeting	ATL Facilities	3/20/2012 Tue	3/29/2012 Thu	Confirmed	New York - Collaboration Room 1	Yes
21262	Meeting	Evans, Dean	6/25/2012 Mon	6/25/2012 Mon	Request	Denver - 02.West	Yes
21260	Meeting	Evans, Dean	7/3/2012 Tue	7/31/2012 Tue	Request	Denver - 02.West	Yes
21263	2012 TDF Time Trial Live Watch Stage	Evans, Dean	7/23/2012 Mon	7/23/2012 Mon	Request	Denver - 02.West	Yes

You can carry out the following actions from the Requests page:

- To view the list of requests in a Calendar view, open the Calendar tab.
- To search for a reservation, enter a reservation ID in the Reservation ID field and/or a search string in the Event Name field, and then click Quick Search.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns the College of **E**ducation Seminar, **E**d Smith fundraiser, Health Center **E**ducation Training, and so on.*

- To view all requests that have a date older than the current day's date, open the Historical tab.
- To open a selected reservation for viewing and/or editing on the Reservation Summary page, click the name of the reservation. See [“The Reservation Summary Page”](#)

The Reservation Summary Page

After you submit *any* type of reservation request, the Reservation Summary page opens. The Reservation Summary page also opens after you select View My Requests on the Reservations menu, and then select a specific reservation request for viewing. In both cases, the Reservation Details tab is the active tab. The Reservation Details tab on the Reservation Summary page displays summary information for the selected reservation and all its bookings as well as any services that were requested for the bookings.

Figure 3-18: Reservation Summary page, Reservation Details tab

The screenshot displays the 'Reservation Details' tab of the Reservation Summary page. The top navigation bar includes 'Browse', 'Reservations', 'My Account', 'Admin', and 'Help', with a welcome message for Tammy Van Boening. The main content area is divided into three tabs: 'Reservation Details' (active), 'Additional Information', and 'Attachments'. The 'Reservation Details' tab shows the following information:

- Reservation Id:** 21263
- Meeting Name:** 2012 TDF Time Trial Live Watch Stage
- Meeting Type:** Meeting - Internal
- Cost Center Number:** 22.2222
- Department Code:**
- Group Name:** Evans, Dean
- 1st Contact Name:** (none)
- 2nd Contact Name:** (none)
- Phone:** (none)

On the right side of the details, there is a list of actions: Edit Reservation, Add Booking, Cancel Services, Cancel Bookings, Cancel All Bookings, Service Availability, View Reservation Summary, Add booking to personal calendar, Booking Tools, and Edit Additional Information. Below the details, there are three tabs: 'All', 'Current' (selected), and 'Historical'. The 'Current' tab displays a table of bookings:

ACTIONS	SERVICES	DATE	TIME	TITLE	LOCATION	STATUS	SETUP
		7/23/2012 Mon	6:00 PM - 11:00 PM MT	2012 TDF Time Trial Live Watch Stage	Denver - 02.West	Request	(none) (50)

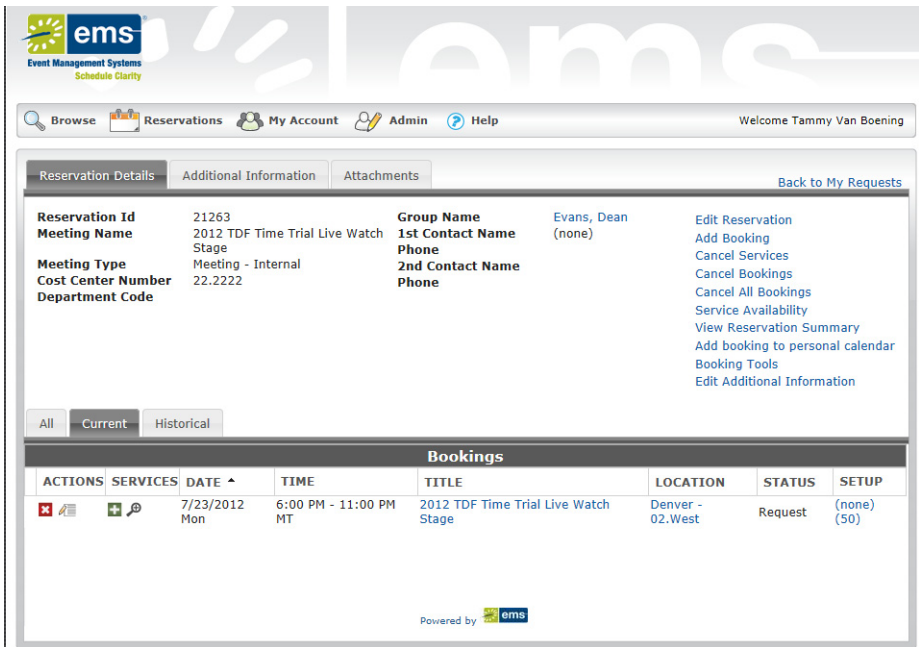
The page is powered by EMS.

In addition to the Reservation Details tab, the Reservation Summary page might have up to two additional tabs in the top pane of the page—the Additional Information tab and the Attachments tab. The Reservation Summary page also has three tabs in the bottom pane—All, Current, and Historical of the page. See:

- “Reservation Details tab”
- “Additional Information tab”
- “Attachments tab”
- “Current tab”

Reservation Details tab

Figure 3-19: Reservation Summary page, Reservation Details tab



The Reservation Details tab 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 any services that were requested for the bookings. The following links are displayed on the Reservation Details tab. Click a link to carry out the indicated action.

Link	Description
Edit Reservation	Update event and/or group details.
Manage Attendees	Add or remove attendees. (Available only if using the optional Plan a Meeting (PAM) module.)
Add Bookings	Add a booking to the reservation. See “Submitting a Request for a Space - Booking a Room”
Cancel Services	Cancel selected services for all bookings in the reservation. Note: You can also cancel selected services for one or more bookings in a reservation on the Current tab. See “Current tab”
Cancel Bookings	Cancel selected bookings for the reservation. Note: You can also cancel selected bookings on the Current tab. See “Current tab”
Cancel All Bookings	Cancel all bookings for the reservation.
Service Availability	Opens a Service Availability message in which you can view the buildings for which the service is allowed as well as any booking rules for the service.

Link	Description
View Reservation Summary	Provides a summary of the selected reservation, all its bookings, and any resources/services that were ordered. Three views are available—Detail, Summary, and Mobile Friendly. The summary also contains an Email Option for emailing the summary to one or more recipients.
Add booking to personal calendar	Adds the reservation and all its bookings to your personal calendar.
Booking Tools	Provides options for editing multiple bookings (date and time) for the reservation.
Edit Additional Information	Provides the option for modifying your answers to any questions or modifying any comments for the reservation.

Additional Information tab

Figure 3-20: Reservation Summary page, Additional Information tab

ems Event Management Systems Schedule Clarity

Browse Reservations My Account Admin Help Welcome Tammy Van Boening

Reservation Details **Additional Information** Attachments [Back to My Requests](#)

• Would you like someone from Meeting Services to assist you with this meeting/event?
• No

All Current Historical

Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
		7/23/2012 Mon	6:00 PM - 11:00 PM MT	2012 TDF Time Trial Live Watch Stage	Denver - 02.West	Request	(none) (50)

Powered by

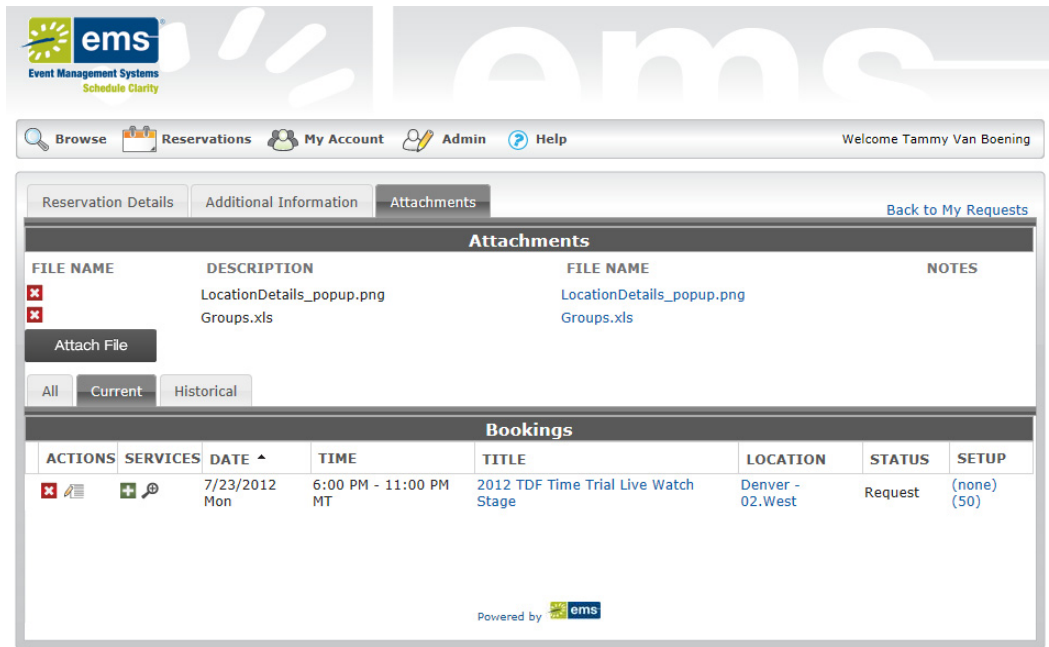
The Additional Information tab is displayed only if you had the option to answer questions or were required to answer questions when making the reservation request, and/or you had the option of entering comments for the reservation. The tab is a view-only tab and it displays the questions and your answers, if any, to these questions, as well as any comments that you entered for the reservation.




To modify the answers to any questions that are displayed on this tab, you must open the Reservation Details tab, and then click the Edit Additional Information link. See [“Reservation Details tab”](#)

Attachments tab

Figure 3-21: Reservation Summary page, Attachments tab


















The Attachments tab is displayed if you had the option of attaching files to the room reservation request. This tab displays the following information for each attachment—the attachment description, the attachment file name, and any notes that were entered for the attachment. You can do the following on this tab:


- To delete an attachment from a reservation or request, click the Delete icon  next to it.
- To attach another file to the reservation or request, click Attach File. A dialog box opens in which you can browse to and select the attachment. (Allowed attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.)

Current tab






The All tab displays *all* the bookings for the selected reservation, regardless of the booking date. The Current tab displays all the *current* bookings (bookings with a date greater than or equal to the current day's date) for the selected reservation. The Historical tab displays all the past bookings (bookings with a date before the current day's date) for the selected reservation.

Figure 3-22: Reservation Summary page, Current tab


Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
 		7/3/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
 		7/10/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
 		7/17/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
 		7/24/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
 		7/31/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)

Powered by 

You can do the following on the Current tab:

- To cancel a booking, click the Cancel Booking icon  next to it.
- To edit a booking, click the Edit Booking icon  next to it. See [“To edit a booking”](#)
- To add services (attendees/visitors, setup notes, resources with service orders and/or resources without service orders) to a booking, click the Add/Edit Services icon  next to it, and then continue to [“To add services for a booking”](#)
- To edit and/or cancel (delete) services (attendees/visitors, setup notes, resources with service orders and/or resources without service orders) for a booking, click the Add/Edit Services icon  next to it, and then continue [“To edit and/or cancel services for a booking”](#)
- To view services for a booking, click the View Services icon  next to it.

To edit a booking

After you click the Edit Booking icon  next to the booking that you are editing, a Request page opens.



The Request 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.

1. Edit the information for the booking as needed.



Required fields are marked with a red asterisk ().*

2. At the bottom of the Request page, click Update Booking.

A message opens indicating that the booking was successfully updated.

3. Click OK.

The message closes. You return to the Reservation Summary page with the new or modified information for the booking displayed.

To add services for a booking


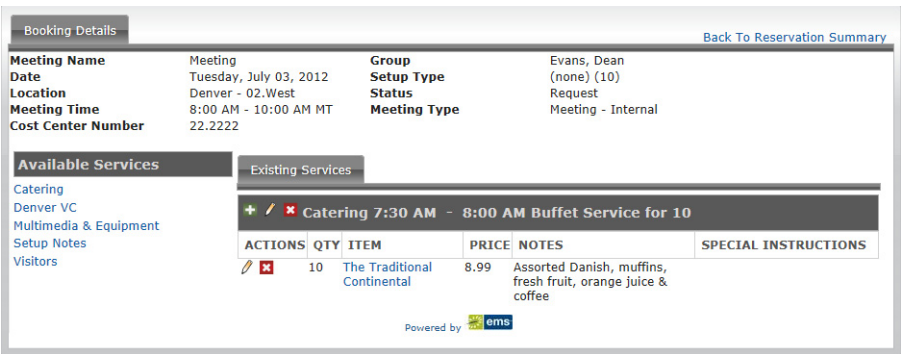


After you click the Add/Edit Services icon  next to a booking, the Booking Details tab opens. This tab displays not only summary information for the booking (event name, event date, location, and so on), but also the services that are available for adding to the booking (Available Services tab) and the services that you have already added to the booking (Existing Services tab).

Figure 3-23: Booking Details tab



The screenshot displays the 'Booking Details' tab. At the top, there's a 'Back To Reservation Summary' link. Below it, a table lists booking details: Meeting Name (Meeting), Date (Tuesday, July 03, 2012), Location (Denver - 02.West), Meeting Time (8:00 AM - 10:00 AM MT), Cost Center Number (22.2222), Group (Evans, Dean), Setup Type ((none) (10)), Status (Request), and Meeting Type (Meeting - Internal). Below this, there are two tabs: 'Available Services' and 'Existing Services'. The 'Available Services' tab is active, showing a list of services: Catering, Denver VC, Multimedia & Equipment, Setup Notes, and Visitors. The 'Existing Services' tab is also visible, showing a table with columns: ACTIONS, QTY, ITEM, PRICE, NOTES, and SPECIAL INSTRUCTIONS. The table contains one row for 'Catering 7:30 AM - 8:00 AM Buffet Service for 10' with a quantity of 10 and a price of 8.99. The notes for this service are 'Assorted Danish, muffins, fresh fruit, orange juice & coffee'. At the bottom, it says 'Powered by ems'.

Meeting Name	Meeting	Group	Evans, Dean
Date	Tuesday, July 03, 2012	Setup Type	(none) (10)
Location	Denver - 02.West	Status	Request
Meeting Time	8:00 AM - 10:00 AM MT	Meeting Type	Meeting - Internal
Cost Center Number	22.2222		

Available Services		Existing Services					
Catering		+ - x Catering 7:30 AM - 8:00 AM Buffet Service for 10					
Denver VC		ACTIONS	QTY	ITEM	PRICE	NOTES	SPECIAL INSTRUCTIONS
Multimedia & Equipment		 	10	The Traditional Continental	8.99	Assorted Danish, muffins, fresh fruit, orange juice & coffee	
Setup Notes							
Visitors							

Powered by ems

1. On the Available Services tab, click the link for the type of service that you are adding to the booking.

The Available Services tab is refreshed with options based on the type of service that you are adding.

- If you are adding resources with service orders, catering (food) services, resources without service orders, setup notes and/or a room charge, go to [Step 2](#).
 - If you are adding attendees/visitors, then go to [Step 3](#).
2. Enter the necessary information for the services that you are adding to the booking, and then at the bottom of the page, click Save.



Required fields are marked with a red asterisk (). Depending on the booking detail that you are adding, you might have to supply additional information such as the start and end times, the estimated count, and so on. You might also have to answer service-specific questions, and/or have to agree to Terms and Conditions.*







The Available Services tab closes. You return to the Booking Details tab.

- If the reservation for which you edited the booking has but this single booking, then a message opens indicating that your request was completed successfully. Click OK to close the message and remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.
- If the reservation for which you edited the booking has multiple bookings, then do one of the following:
 - To add the booking detail to just this selected booking, click Do Not Apply to Additional Bookings. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.
 - To add the booking detail to one or more of the other bookings in the reservation, select the appropriate bookings (to select all the remaining bookings in a single step, select the blank checkbox in front of the Date column heading), and then click Save. A message opens indicating that your request was completed successfully. Click OK to close the message. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.



Any resource conflicts are marked with a Warning icon and highlighted in red. See [Figure 3-24](#) below.

Figure 3-24: Resource conflict indicated

Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
		7/3/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
		7/10/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)
		7/17/2012 Tue	8:00 AM - 10:00 AM MT	Meeting	Denver - 02.West	Request	(none) (10)

3. For *each* attendee/visitor that you are adding to the booking, enter the necessary information, and then click Save.



Required fields are marked with a red asterisk ().*

You remain on the Attendees/Visitor page.

4. *After* you add all necessary attendees/visitors, do one of the following:
 - If the reservation for which you edited the booking has but this single booking, then click Back to Reservation Summary page.
 - If the reservation for which you edited the booking has multiple bookings, then do one of the following:
 - To add the booking detail to just this selected booking, click Back to Reservation Summary page.
 - To add the booking detail to one or more of the other bookings in the reservation, click Add to Additional Bookings. You return to the Booking Details tab. Select the appropriate bookings (to select all the remaining bookings in a single step, select the blank checkbox in front of the Date column heading), and then click Save. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.

To edit and/or cancel services for a booking


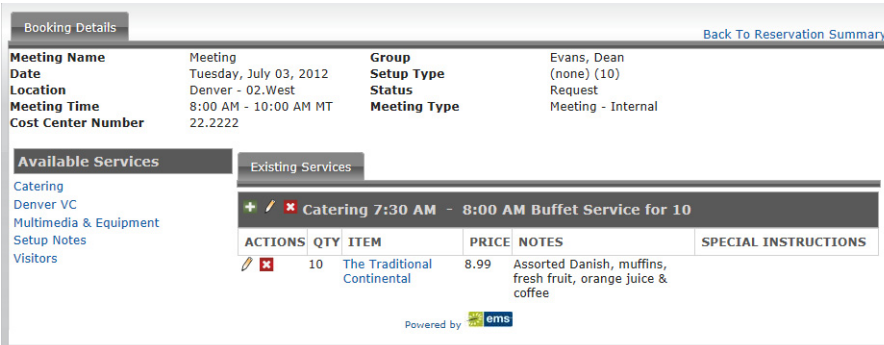
After you click the Add/Edit Services icon  next to a booking, the Booking Details tab opens. This tab displays not only summary information for the booking (event name, event date, location, and so on), but also the services that are available for adding to the booking (Available Services tab) and the services that have already been added to the booking (Existing Services tab).



Figure 3-25: Booking Details tab



The screenshot shows the 'Booking Details' tab with a 'Back To Reservation Summary' link. The meeting information is as follows:






Field	Value	Field	Value
Meeting Name	Meeting	Group	Evans, Dean
Date	Tuesday, July 03, 2012	Setup Type	(none) (10)
Location	Denver - 02.West	Status	Request
Meeting Time	8:00 AM - 10:00 AM MT	Meeting Type	Meeting - Internal
Cost Center Number	22.2222		

Below the meeting information, there are two tabs: 'Available Services' and 'Existing Services'. The 'Existing Services' tab is active, showing a service titled 'Catering 7:30 AM - 8:00 AM Buffet Service for 10'. Below this, a table lists the items in the service:

ACTIONS	QTY	ITEM	PRICE	NOTES	SPECIAL INSTRUCTIONS
 	10	The Traditional Continental	8.99	Assorted Danish, muffins, fresh fruit, orange juice & coffee	

At the bottom right, it says 'Powered by ems'.

You have the following options for editing and/or canceling (deleting) the services for a booking:

- To add a new item to a service, click the New Item icon  for the service.
- To edit the service, for example, the start and stop times for a Catering service, click the Edit icon  for the service.
- To cancel (delete) the service (which deletes all items in the service), click the Cancel Service Order icon  for the service.
- To edit a single item for a service, for example, the quantity and/or special instructions for an item, click the Edit Item  icon next to the item.
- To cancel (delete) a single item for a service, click the Cancel Item icon  next to the item.

My Acct Menu

The My Account menu provides options for editing your user profile and for specifying *delegates*, which are web users who can assume your identity in VEMS and carry out actions in VEMS on your behalf. It also contains options for options for customizing some default values (Start Time, End Time, and so on) for the different types of room requests and for creating a list of favorite rooms to search for availability.

This chapter covers the following topics:

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

Creating a User Account

The VEMS Default page is the page that you first have access to before you log into VEMS or before you request to [create](#) a user account.

To create a user account

1. On the VEMS Default page, under my Account, click Create An Account.

The Create An Account page opens.

Figure 4-1: Create An Account page

The screenshot shows the 'Create An Account' page in the VEMS system. The page has a header with the EMS logo and 'Event Management Systems Schedule Clarity'. Below the header is a 'My Account' section with a 'Welcome Guest' message. The main content area is titled 'User Info' and contains a form with the following fields: Email (required), Name (required), Phone, Fax, Time zone (dropdown menu with '(no preference)' selected), Password (required), Confirm Password (required), and Notes (expandable). There is a checkbox for 'I do NOT want to receive automatic emails'. Below the form is a Zendesk logo and a CAPTCHA section with the text 'Type the code shown:' and a small image of a code. A 'Show another code' link is provided. A 'Save' button is at the bottom of the form. The footer indicates 'Powered by EMS'.

2. Enter the information for your user account.
 - Required fields are marked with a red asterisk (*).
 - The option to opt out of receiving automatic emails from VEMS refers to emails such as event reminders, the reservation summary that is emailed when you submit your reservation, and view or modify miscellaneous notes for the account.
 - The code that you are prompted to enter is used to authenticate your request to create an account. The code is case-sensitive, and therefore, you must enter the code exactly as it is displayed. If you cannot read the code that is displayed, then you can always select Show another code.
 - VEMS does not impose any rules on your account's password; however, you might have to adhere to your organization's standards for passwords.

3. Click Save.

Depending on how VEMS has been implemented at your organization, one of two results is possible:

- Your account is immediately activated.
- Your account is placed in a pending status and must be approved by your EMS administrator before it can be activated.

Modifying your User Account

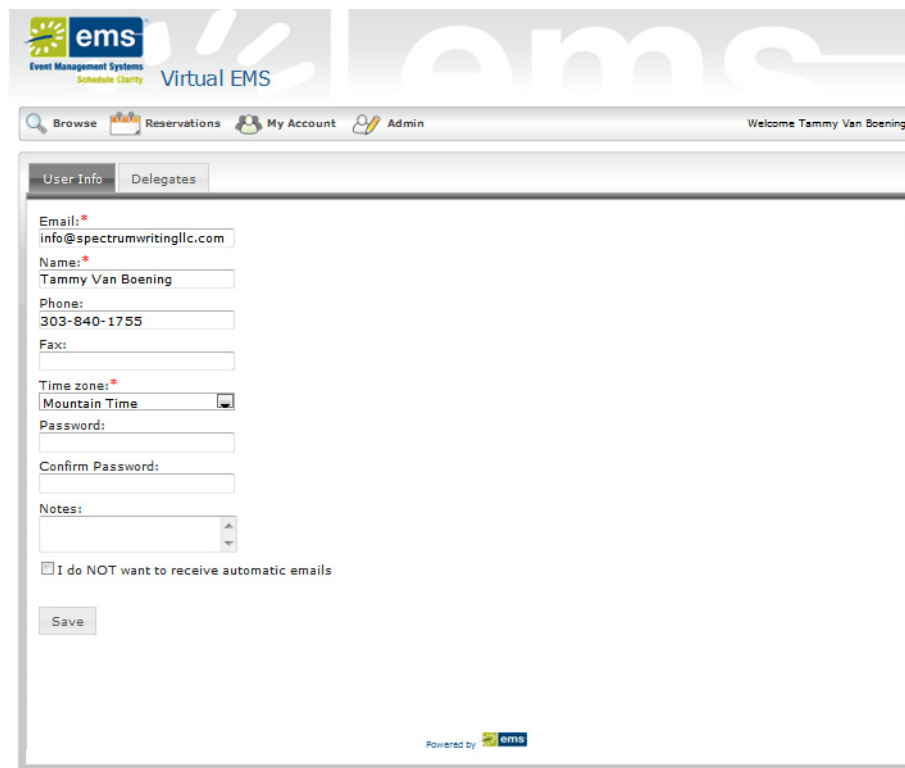
Your user account specifies your email address, your name, your phone number, your fax number, and your time zone. You can [modify](#) all these values. Your user account also provides the option of [modifying](#) your VEMS password.

To modify your user account

1. Under My Account, click Edit My Account.

The User Account page opens. The User Info tab is the active tab.

Figure 4-2: User Account page, User Info tab



The screenshot shows the 'Virtual EMS' user interface. At the top, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin' links. The 'My Account' link is active. Below the navigation bar, the 'User Info' tab is selected. The form contains the following fields: Email (info@spectrumwritingllc.com), Name (Tammy Van Boening), Phone (303-840-1755), Fax (empty), Time zone (Mountain Time), Password (empty), Confirm Password (empty), and Notes (empty). There is a checkbox for 'I do NOT want to receive automatic emails' and a 'Save' button. The footer indicates 'Powered by EMS'.

2. Do one or more, or all of the following:

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



If you log into VEMS using your network email address and you change your email address, then this new email address is the address that you must now use for logging in.

- To change your password, enter your new password in the Password field, and then enter the exact same password again in the Confirm Password field.



Options might also be present to opt out of receiving automatic emails that are received from VEMS such as reminders or the reservation summary that is emailed when you submit your reservation and/or view and modify miscellaneous notes for the account.

3. Click Save.

Creating Delegate Accounts

A *delegate* is another web user who can assume your identify upon logging into VEMS and carry out actions on your behalf. You can [create](#) one or more delegate accounts.

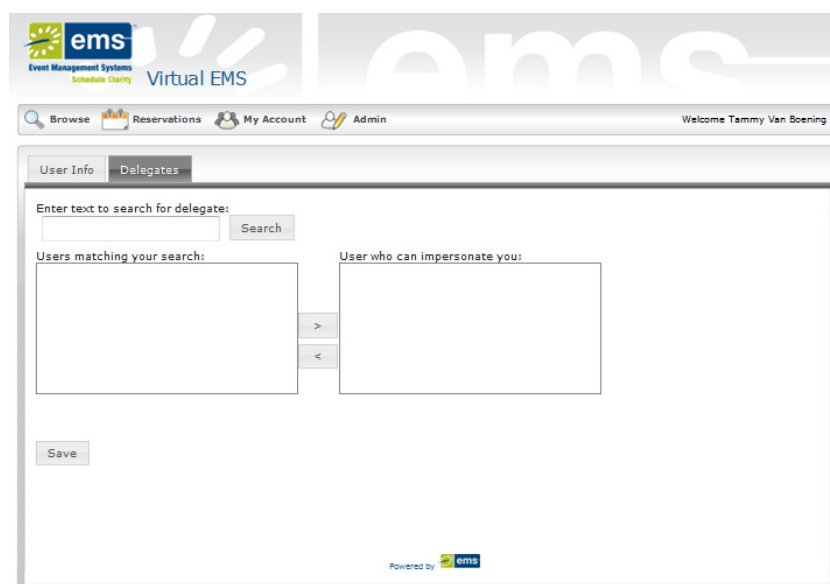
To create delegate accounts

1. Under My Account, click Edit My Account.

The User Account page opens. The User Info tab is the active tab.

2. Open the Delegates tab.

Figure 4-3: User Account page, Delegates tab



3. In the search field, enter a search string to search for users who are to be your delegates, and then click Search.

A list of users who meet the search criteria are displayed in the Users matching your search pane.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns **Ed** Smith, **Ted** Wilson, and so on.*

4. Select the web user, or CTRL-click to select the multiple web users who are to be your delegate accounts, and then click the Move (>) button to move the selected users to the User who can impersonate you list.
5. Click Save.

Setting Default Values for Room Requests

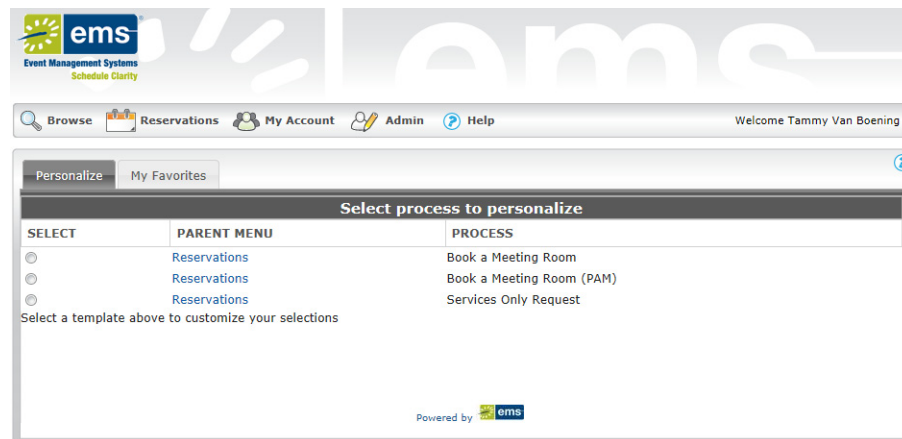
The My Account menu contains options for [setting](#) some default values (Start Time, End Time, and so on) for the different types of room requests.

To set default values for room requests

1. Under My Account, click User Options.

The User Personalization page opens. The Personalize tab is the active tab.

Figure 4-4: User Personalization page, Personalize tab



2. Select the room request process for which you are setting the default values.

A Personalize Options section is displayed on the tab is refreshed. This section displays the list of options for the template for which you can set default values. See [Figure 4-5](#)

Figure 4-5: User Personalization page, Personalization Options section

The screenshot shows the 'Personalize' tab in the EMS system. The main section is titled 'Select process to personalize' and contains a table with three columns: SELECT, PARENT MENU, and PROCESS. The 'SELECT' column has three radio buttons, all of which are currently selected. The 'PARENT MENU' column lists 'Reservations' for each option. The 'PROCESS' column lists 'Book a Meeting Room', 'Book a Meeting Room (PAM)', and 'Services Only Request'. Below this table is the 'Personalization Options' section, which includes various filters and a 'Save Preferences' button.

SELECT	PARENT MENU	PROCESS
<input checked="" type="radio"/>	Reservations	Book a Meeting Room
<input checked="" type="radio"/>	Reservations	Book a Meeting Room (PAM)
<input checked="" type="radio"/>	Reservations	Services Only Request

Personalization Options

Start Time:

End Time:

Display Results As
☒ List ☐ Grid ☐ Floor Map

Meeting Name:

Meeting Type:

Time zone:

Areas:

Facilities:

Setup Type:

Room Type:

Floor:

- Set the default values as needed for any and all of the displayed options, and then click Save.

Now, any time you select this room request process on the Reservations menu, the default values that you enter here are automatically displayed when the Room Request page opens.

Creating a List of Favorite Rooms

The My Account menu contains options for [creating](#) a list of favorite rooms that can be searched for availability when you are creating a room request. This list of favorites is displayed in the Facilities dropdown list on the Room Request page.

To create a list of favorite rooms


1. Under My Account, click User Options.

The User Personalization page opens. The Personalize tab is the active tab.

2. Open the My Favorites tab.

Figure 4-6: User Personalization page, My Favorites tab

The screenshot shows the 'My Favorites' tab in the 'User Personalization' section. At the top, there's a header with the 'ems' logo and 'Virtual EMS' text. Below the header is a navigation bar with links: 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is on the right. The main content area has two tabs: 'Personalize' and 'My Favorites'. The 'My Favorites' tab is active. It contains a form with a 'Name:' label and a text input field containing 'My Favorites'. Below the input field is a 'Save' button. Underneath the form is a section titled 'Locations in your favorites' with the message 'No one matched your request'. Below this is a search bar with three dropdown menus: 'Building:' (set to '(all)'), 'Room Types:' (set to '(all)'), and 'Floor:' (set to '(all)'). To the right of these dropdowns is a search icon. Below the search bar is a section titled 'Top 500 Rooms matching your filter' with the message 'Nothing matches your search criteria'. At the bottom of the page, there is a 'Powered by' logo for 'ems'.

3. In the Name field, enter a name for your Favorites list, and then click Save.
A message opens, indicating that your request was completed successfully.
4. Click OK to close the message and remain on the Favorites tab.
5. Enter the search criteria on the Building dropdown list, the Room Type dropdown list, and/or the Floor dropdown list, and then click the Search icon  to return only those rooms that meet all the search criteria.

See [Figure 4-7](#)

Figure 4-7: User Personalization page, My Favorites tab with search results

The screenshot shows the 'My Favorites' tab in the User Personalization page. At the top, there's a header with the 'ems' logo and 'Virtual EMS' text. Below the header, there's a navigation bar with links: 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is on the right. The main content area has two tabs: 'Personalize' and 'My Favorites'. Under 'My Favorites', there's a 'Name:' field with 'My Favorites' entered and a 'Save' button. Below this, a section titled 'Locations in your favorites' shows 'No one matched your request'. There are filters for 'Building:' (set to 'Corporate Center West'), 'Room Types:' (set to '(all)'), and 'Floor:' (set to '(all)'). A search icon is next to the floor filter. Below the filters, a table titled 'Top 500 Rooms matching your filter' displays search results.

ADD	BUILDING	ROOM	ROOM TYPE	FLOOR
	Corporate Center West	Cafeteria	Multi-Purpose	Mezzanine
	Corporate Center West	Small Conference Room	Conference	Executive Suites
	Corporate Center West	Video Conference Room 201	Video Conference	1st Floor
	Corporate Center West	Video Conference Room 202	Video Conference	1st Floor

At the bottom of the page, it says 'Powered by ems'.

- Click the Select icon next to each room that you are including in your Favorites list.

Now, when you select any type of room request process for which you can book a room, the name of your Favorites list is automatically displayed in the Facilities field for the request. If you leave the Facilities field set to this value, then all the rooms that are contained in this Favorites list are automatically searched for availability after you click Find Space.

Mobile VEMS

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

This chapter covers the following topics:

- [“Working with the Mobile Version of VEMS”](#)

Working with the Mobile Version of VEMS

If you access VEMS from a mobile device, you are redirected to the VEMS mobile version.

Figure 5-1: VEMS mobile version, Home page

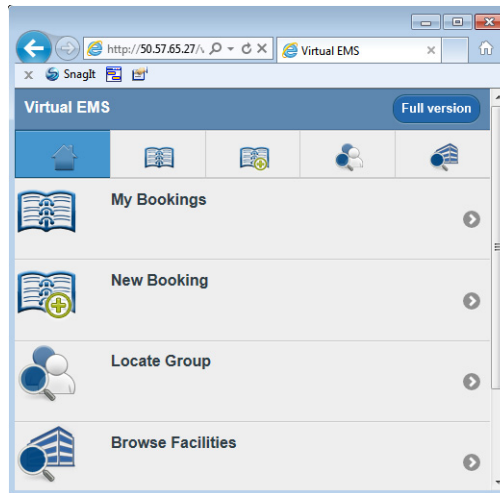








Table 5-1: Icons on the Mobile VEMS Home page

Icon	Description
	Click the Home icon at any time to return to the Mobile VEMS Home page.
	Click the My Bookings icon to open a page on which you can view all the bookings that you have made in VEMS.
	Click the New Bookings icon to open a page on which you can enter bookings in VEMS.
	Click the Groups icon to open a page that lists all the groups for which you can make a booking in VEMS. You can also search for groups on this page.
	Click the Browse Facilities icon to open a page that lists all the facilities that you can book in VEMS. You can also search for facilities on this page. Note: A Map icon  might be displayed next to a facility. Click this icon to view the location of the facility on a map.

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