

# Virtual EMS (VEMS)

## Installation, Configuration, and User Guides

**V44**

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## CHAPTER 1: Introduction to the Virtual EMS (VEMS)

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 review What's New in Version 44 before they begin working with the new version of the software. Doing so will streamline the adoption of the new release and help them benefit from new features and functions that they might not otherwise discover.

### Interested in upgrading?

Contact EMS Sales at (800) 440-3994. For more information, visit [www.emssoftware.com](http://www.emssoftware.com).

## CHAPTER 2: Virtual EMS (VEMS) Hardware and Software Requirements

### Virtual EMS (VEMS)

<p>SUPPORTED DESKTOP BROWSERS</p>	<p>INTERNET EXPLORER 8, 9, 10, 11                  FIREFOX*                  GOOGLE CHROME*                  SAFARI (MAC OS ONLY)</p> <p>*LATEST VERSIONS</p>
<p>Supported Mobile Browsers</p>	<p>Google Chrome (Android, iOS 8 and 9)                  Safari (iOS 8 and 9)</p>
<p>Minimum System Requirements</p>	<p>Processor: 2.0 GHz or faster*                  Memory: 2 GB or more*                  Video: SVGA 1024 x 768 or higher resolution                  Network Card: 10 / 100 / 1000 Mbps Ethernet (or other Internet connectivity)</p>

## CHAPTER 3: Install or Upgrade VEMS

**IMPORTANT:** Before beginning the installation process, please install or upgrade your EMS databases as outlined in the EMS Installation Instructions. Existing versions of Virtual EMS must be manually uninstalled. Please make sure to copy-off and save any files that have been customized.

### Obtain the Latest Release of VEMS

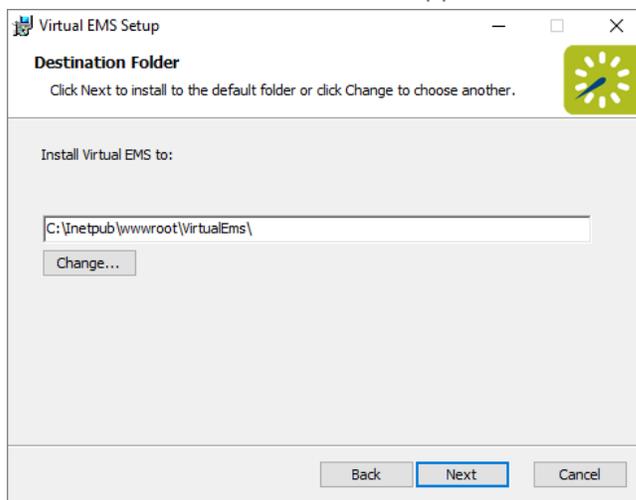
The latest release of Virtual EMS can be downloaded from the online Support Center.

1. Navigate to [www.emssoftware.com](http://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.

### Install or Upgrade VEMS

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.

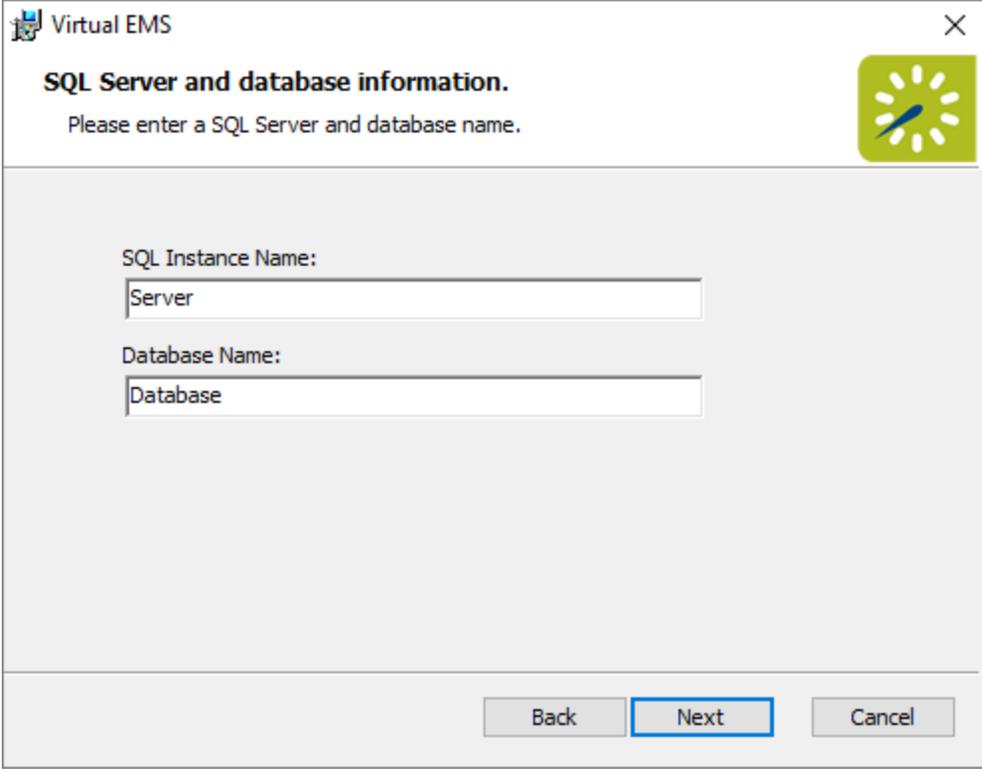
The Destination Folder screen will appear.



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.



Virtual EMS

**SQL Server and database information.**

Please enter a SQL Server and database name.

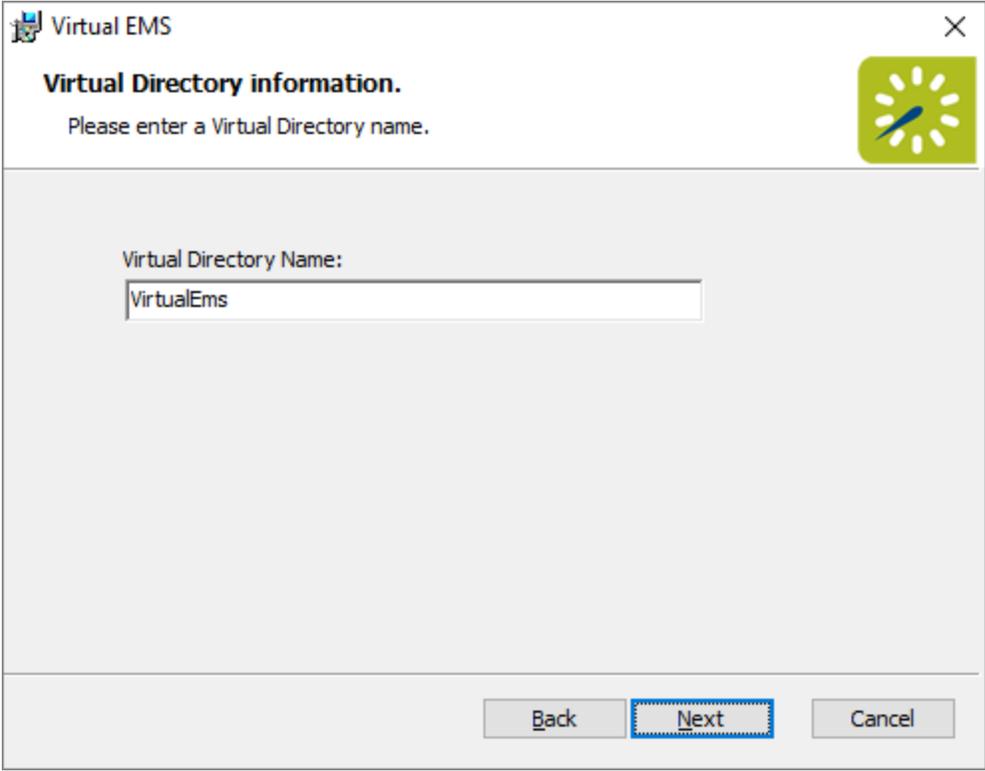
SQL Instance Name:

Database Name:

Back Next Cancel

8. Enter your SQL Instance Name.
9. Enter your Database Name:
  - EMS Professional customers – typically named “EMSData”
  - EMS Workplace, EMS Campus, EMS Enterprise, EMS District and EMS Legal customers - typically named “EMS”
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 Install to install Virtual EMS.
14. The Completed the Virtual EMS Setup Wizard screen will appear. Click Finish.

## Start 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.

## CHAPTER 4: Optional VEMS 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 see 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 see 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 see the Floor Plan Module Installation Instructions for installation instructions.

## CHAPTER 5: Introduction to the Virtual EMS (VEMS) Configuration Guide

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 review What's New in Version 44 before they begin working with the new version of the software. Doing so will streamline the adoption of the new release and help them benefit from new features and functions that they might not otherwise discover.

### Interested in upgrading?

Contact EMS Sales at (800) 440-3994. For more information, visit [www.emssoftware.com](http://www.emssoftware.com).

## CHAPTER 6: Configure Web Users

VEMS classifies users into two categories—*unauthenticated users* or *visitors* and *authenticated users* or *web users*. If allowed, visitors can browse a calendar of events or view details about your organization's space; however, to submit and manage reservations, a web user account is required. You can configure a web user in one of four ways:

1. Anonymous users can register themselves through VEMS and create a user account.

TIP: For an anonymous user to register through VEMS and create a user account, the appropriate account management parameters must be set (see VEMS System Parameters) and the Credit\Edit an Account role be selected for the unauthenticated user. See the Roles tab definition in [Configure a Web Security Template](#).

2. You can define the web user through the EMS client. See "To create a web user from a group" or "To create a web user from a contact".
3. Through the optional HR Toolkit module.
4. Through the optional LDAP/Integrated Authentication module.

This topic will provide information that will allow you to:

- [Search for a Web User](#)
- [Configure Web Users in EMS](#)

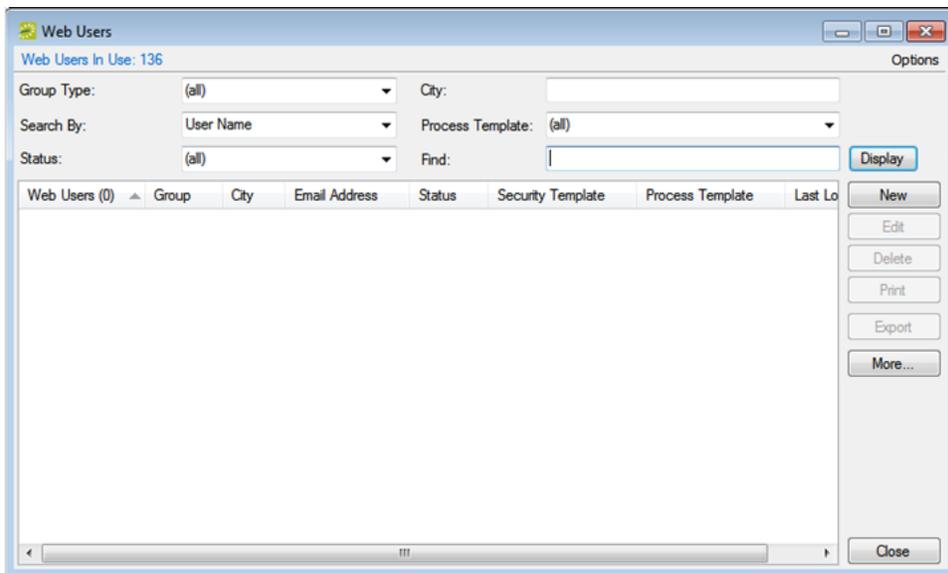
TIP: For more information about using optional HR Toolkit module or the optional LDAP/Integrated Authentication module to configure web users, contact your account representative at EMS Software.

Before you configure a web user, you should search for the user to verify that the user has not already been created.

TIP: The following procedure describes how to configure a single web user at a time and assign a single web security template and one or more web process templates to the user. To assign multiple web templates to multiple web users in a single step, see "Assigning Web Templates to Multiple Web Users".

### Search for a Web User

1. On the EMS menu bar, click Configuration > Web > Web Users. The Web Users window opens. In the upper left corner, the number of web users currently in use for VEMS is displayed.



2. Enter any combination of the following search criteria:
  - On the Group Type dropdown list, leave the group type set to the default value of (all), or select a specific group type.
  - On the Search by dropdown list, select User Name or Email Address.
  - On the Status dropdown list, select the user status by which to search.
  - On the Process Template dropdown list, leave the default value of (all), or select a specific web process template.
3. To further filter the displayed search results, do one or both of the following:
  - To filter the search results based on either the User Name or Email Address, in the Filter field, enter a search string.
  - To filter the search results based on city, in the City field, enter a search string.

TIP: For either field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bobworth@ems.com but not dbobbett@ems.com.

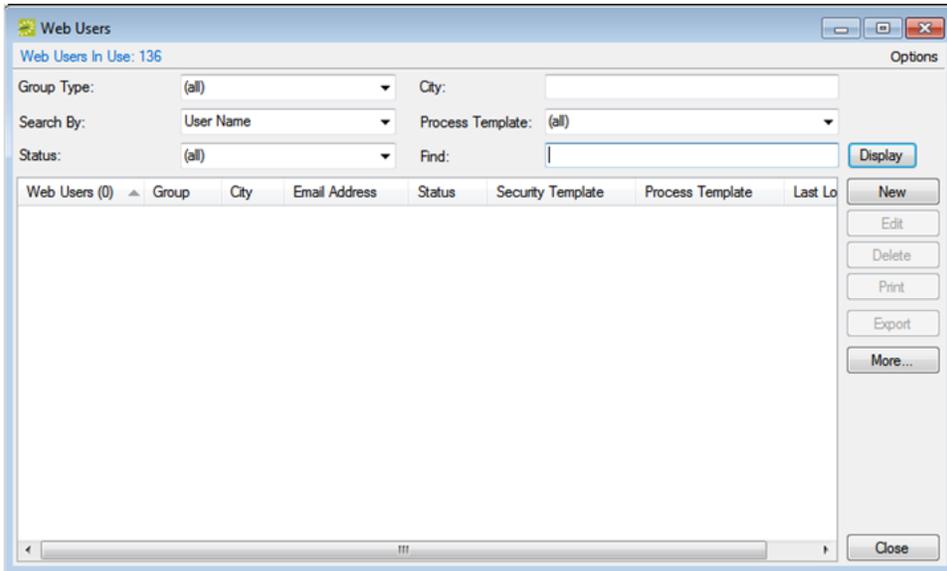
4. Click Display. The web users who meet your search criteria are displayed in the lower pane of the Web Users window.

## Configure Web Users in EMS

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

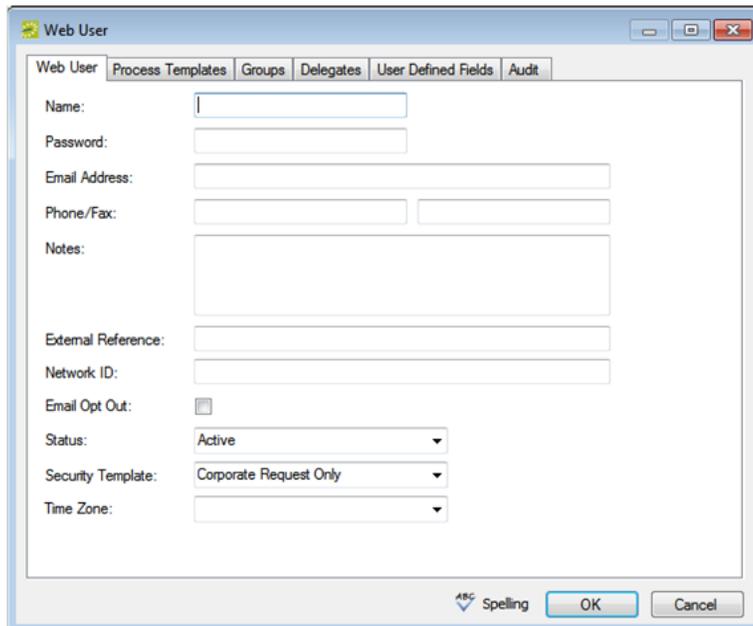
TIP: Remember, before you configure a web user, you might want to search for the user to verify that it has not already been configured. See "To search for a web user."

1. On the EMS menu bar, click Configuration > Web > Web Users. The Web Users window opens. In the upper left corner, the number of web users currently in use for VEMS is displayed.



TIP: If the EMS system parameter Web Users linked to Groups via External Reference is set to Yes, then a Group column and a City column are also displayed in the Web Users window.

2. Click New. The Web User dialog box opens. The Web User tab is the active tab.



3. If the web user had to answer questions when requesting to create an account through VEMS, you can open the User Defined Fields tab to view the user's answers to the questions. You can view the responses that are displayed on the tab to determine if you want to continue with creating an account for the user.
4. Enter the information for the new web user.

TIP: At a minimum, to create a new web user, you must enter the user name, the user password, and the user email address on the Web User tab. All other information is optional and can be added at later dates when needed.

FIELD	DESCRIPTION
Name	The name of the web user.  Note: The name can be a maximum of 30 characters, including spaces.
Password	The password that the user must enter to log in to VEMS.
Email Address	Enter the full email address for the user as the user must enter this address to log in to VEMS.
Phone/Fax	Optional fields.
Notes	Optional field.
External Reference	Optional field. Links the web user to an outside program if needed.
Network ID	The web user's network ID.
Email Opt Out	Optional field. Select this option if you do not want the web user to receive automatic emails (such as reservation summary emails) from VEMS. The user can still receive manually sent emails.
Status	Required field. Select the status for the user: <ul style="list-style-type: none"> <li>• Active—The web user can log in to VEMS.</li> <li>• Pending—The web user cannot log in to VEMS and is informed that he/she must check back at a later time.</li> <li>• Inactive—The user cannot log in to VEMS and is instructed to contact the</li> </ul>

FIELD	DESCRIPTION
	EMS administrator.
Security Template	Required field. This determines the user's access to the system—the menu items the user can see, and the information that the user can view when 'rolling-over' an event in VEMS.
Time Zone	Optional field. The time zone in which the user is located.

Tip: At a minimum, to create a new web user, you must enter the user name, the user password, and the user email address on the Web User tab. All other information is optional and can be added at later dates when needed.

- Open the Web Process Templates tab and select the web process templates that are to be available to this user.

TIP: The web process templates appear as menu items in VEMS.

- Open the Groups tab and do the following to specify the groups on whose behalf the web user can view and make reservations in VEMS.
  - Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria.

TIP: If you leave the Find field blank, then a list of all currently active groups for the selected group type is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of AAA returns AAA Colorado, but not Colorado AAA.

- In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.
- Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the web user:
    - Leave the Find field blank, and then click Display to open a list of all currently available web users. Select a user, or CTRL-click to select multiple web users, and then click the Move button (>) to move the selected web users to the Selected list.
    - On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select a

web user, or CTRL-click to select web multiple users, and then click the Move button (>) to move the selected users to the Selected list.

TIP: The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bob.worth@ems.com but not dbobbett@ems.com.

8. Optionally, click Spelling to spell check any information that you manually entered for the web user.
9. Click OK. The Web Users dialog box closes. You return to the Web Users window with the newly configured web user automatically selected in the window.

## CHAPTER 7: Configure Additional Information for a Web User

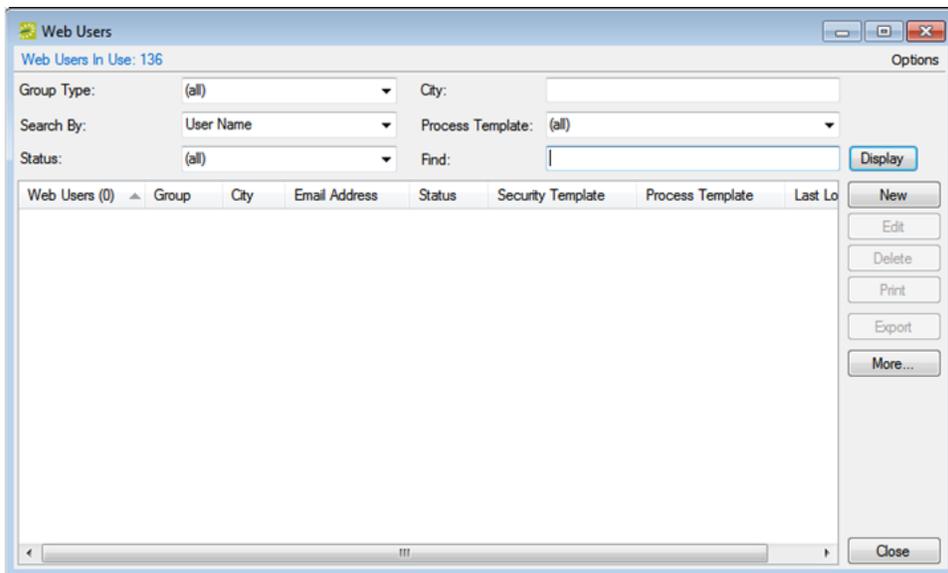
After you have configured a new web user in your EMS database with the basic web user information, you have the option of configuring additional information for the web user. You can create a group from the web user, and you can create a contact from the web user.

This topic will contain the following information that will allow you to:

- [Configure Additional Information for a Web User](#)
- [Configure a Group from a Web User](#)
- [Configure a Contact from a Web User](#)

### Configure Additional Information for a Web User

1. On the EMS menu bar, click Configuration > Web > Web Users. The Web Users window opens. In the upper left corner, the number of web users currently in use for VEMS is displayed.



2. Specify any combination of search criteria, and then click Display to produce a list of all web users that meet the criteria.

Tip: If you leave the Find field blank, then a list of all currently active web users that meet your search criteria is displayed. If you enter a search string in the Find field, the string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Barr returns Barry Jones, but not Amanda Barry.

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

## Configure a Group from a Web User

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

The screenshot shows a dialog box titled "Berry, Denise" with the following fields and options:

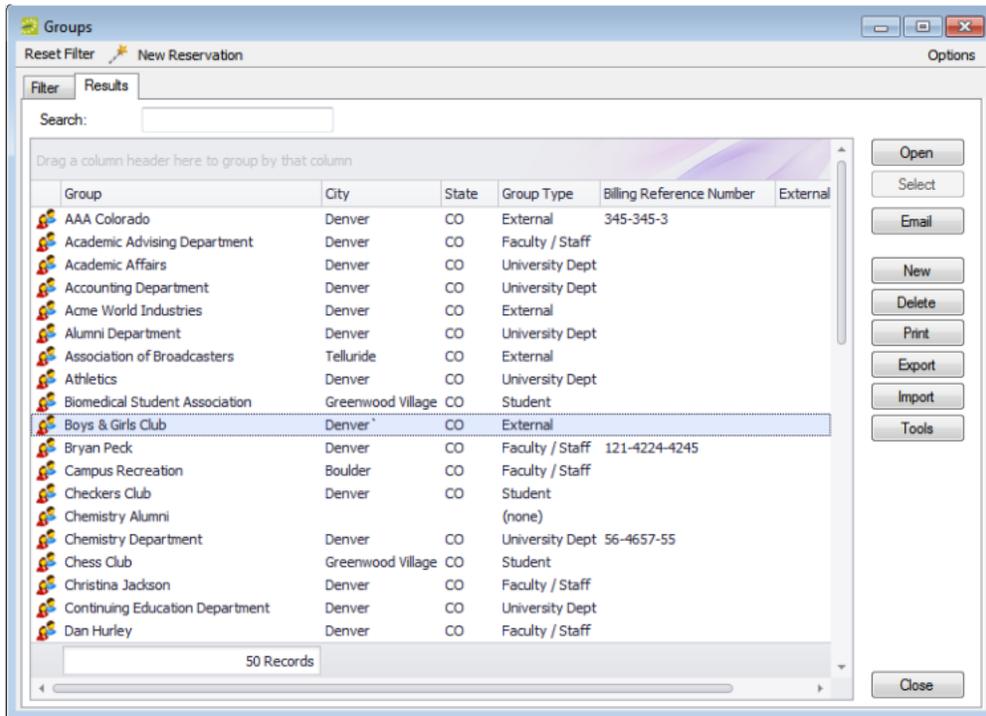
- Name: Berry, Denise
- Address: [Empty]
- City ST Zip: [Empty]
- Country: [Empty]
- International:
- Group Type: (none)
- Phone: [Empty]
- Fax: [Empty]
- Email Address: denise.bery@dea.com
- URL: [Empty]
- Default Contact: (none)
- Require Contacts:
- VIP:
- Inactive:

Buttons: OK, Cancel

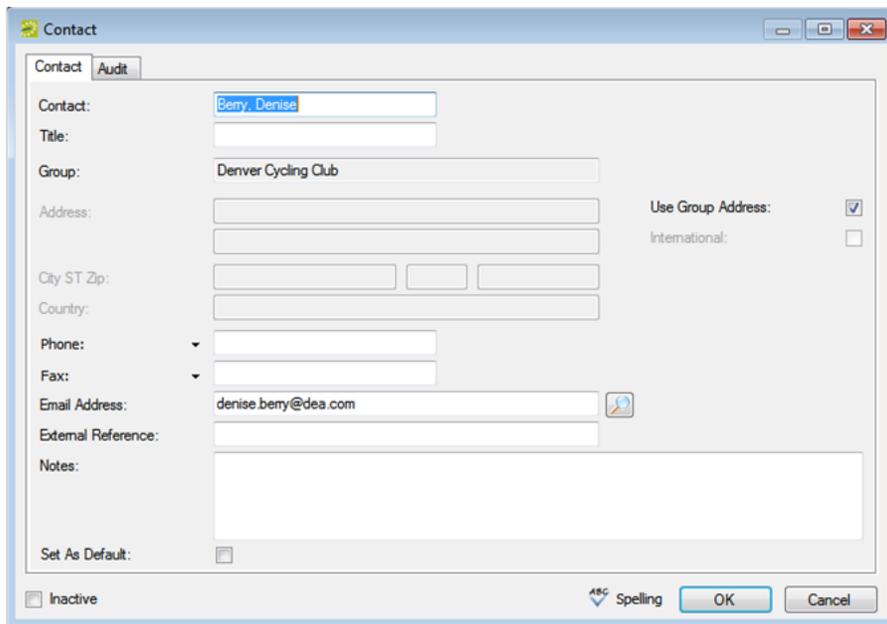
2. Configure the new group as needed. See Configure Groups in EMS Desktop Client.

## Configure a Contact from a Web User

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



2. Search for the group for which you are creating the contact. See "To search for a group and/or contact".
3. Select the group on the Results tab, and then click Select. The Contact dialog box opens.



4. Enter the information for the new contact.

FIELD	DESCRIPTION
Contact	<p>By default, the Contact field is populated with the name of the web user that you selected, but you can edit this value if needed.</p> <p>Note: The name can be a maximum of 50 characters, including spaces.</p>
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone	The phone number and fax number for the group.
Fax	Note: The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	<p>The email address for the contact.</p> <p>Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.</p>
External Reference	Links the contact to an outside program if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	<p>Select this option if the contact is to be the default contact for the selected group.</p> <p>Note: If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is</p>

FIELD	DESCRIPTION
	<p>automatically populated with the name of the default contact.</p> <p>Note: You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.</p>
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

5. Optionally, click Spelling to spell check the information for the contact before you save it.
6. Click OK. The Contact dialog box closes. The contact is created from the web user and added to the group. The group-specific window opens, and Contacts is selected by default.

## CHAPTER 8: Email a Web User

Whether your organization uses Microsoft Outlook or SMTP, you can always email a web user.

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

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

## CHAPTER 9: Configure Web Templates

A web user is a registered user who can submit requests for reservations or schedule reservations in VEMS. A web template defines and controls the access that a web user has in VEMS. VEMS uses two types of web templates—a web security template and a web process template.

- **Web Security template**—You configure a web security template to specify which menu items are available to the users who are assigned to the template, which fields can be viewed in event tooltips, and other information. A single pre-defined web user— unauthenticated user—is defined by default for any VEMS implementation. You use this role to manage the settings for an anonymous or “guest” users.
- **Web Process template**—You configure web process templates to support the various types of reservations (conference room, workspace, study room, and so on) at your organization as well as date/-time restrictions, room security (reserve, request only, no access), and service availability (A/V, catering, and so on) at your organization.

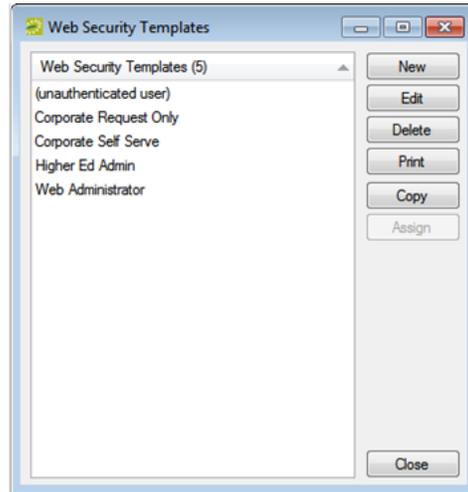
This topic will provide information that will allow you to:

- [Configure a Web Security Template](#)
- [Configure a Web Process Template](#)
  - [Web Template Tab](#)
  - [Booking Rules Tab](#)
  - [Defaults Tab](#)
  - [Video Conference Tab](#)
  - [Rooms Tab](#)
  - [Categories Tab](#)
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  - [User Defined Fields Tab](#)
  - [Parameters Tab](#)
  - [Web Text Tab](#)
  - [Menu Text Translations Tab](#)
  - [Terms and Conditions Tab](#)

### Configure a Web Security Template

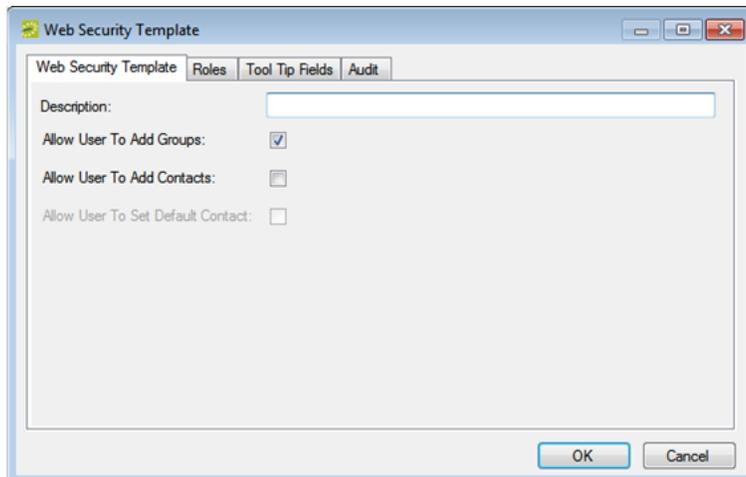
1. On the EMS menu bar, click Configuration > Web > Web Security Templates. The Web Security Templates window opens. This window lists the one web user role (unauthenticated user) that is defined

by default for any VEMS implementation as well as any other web security templates that have been defined for your VEMS implementation.



TIP: The remainder of this procedure describes how to configure a web security template “from scratch.” You can also configure a web security template by copying an existing rule. Select the web security template that you are copying, click Copy, and then go to Step 3.

2. Click New. The Web Security Template dialog box opens. The Web Security Template tab is the active tab.



3. Enter the information for the new web user role.

OPTION	DESCRIPTION
--------	-------------

Description	The description or name for the web security template.
-------------	--

Note: The description can be a maximum of 50 characters, including spaces.

OPTION	DESCRIPTION
Allow User to Add Groups	Selected by default. Users who are attached to this web security template can select from a list of existing groups in your EMS database when submitting a request or making a reservation.
Allow User to Add Contacts	Select this option if you want users who are attached to this web security template to be able to select from a list of existing contacts in your EMS database when submitting a request or making a reservation.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users who are attached to this web template to be able to specify a default contact for a selected group when submitting a request or making a reservation.

- Roles are the tasks that a user who is assigned to the selected template can carry out. Open the Roles tab, and on the Available list, select the role, or CTRL-click to select the multiple roles for the users who are to be assigned to this template, and then click the Move button (>) to move the selected roles to the Selected list.

ROLE	DESCRIPTION
Allow Check In/Allow Check Out	Allows a VEMS user to check in to/check out of a building from VEMS and the EMS Kiosk.
Browse Events	Provides access to the Events calendar in VEMS.
Browse for Space	Allows a VEMS user to browse for available rooms in a read-only grid view.
Create/Edit an Account	For the (unauthenticated user) template, allows a new user to create his/her own VEMS user account. This new web user account is set to active or pending based on your VEMS parameter settings. For the authenticated users, this determines if an existing web user can access the Edit My Account area within VEMS.

ROLE	DESCRIPTION
Custom Events	Provides access to any custom events calendars created.
Delegation	Allows VEMS users to delegate control of their reservations (new and existing) to other VEMS web users.
Locate Group	Allows a VEMS user to view a specific group's reservations for today.
Location Details	Allows a VEMS user to view details (room type, size, phone, features, setup types, images and so on) about a room.
Login\Logout	Allows an anonymous user or "guest" to log in to VEMS.
View Floor Map	Requires the optional Floor Plan module. Allows a VEMS user to view and book rooms on a floor plan.
Web Administrator	Available only for the authenticated administrator template. Provides access to various administrative functions within VEMS such as clearing the cache, enabling help text edit model and enabling detailed errors.

5. Tool Tip Fields is the information that is displayed in grid tooltips when a VEMS user reserves a room in the Room Request area or browses for space in the Browse for Space Area. Open the Tool Tip Fields tab, and on the Available list, select what information is to be displayed in the grid tooltips (CTRL-click to select multiple items), and then click the Move button (>) to move the selected items to the Selected list.
6. Click OK. The Web Security Template dialog box closes. The changes are saved to the template. You return to the Web Security Templates window.

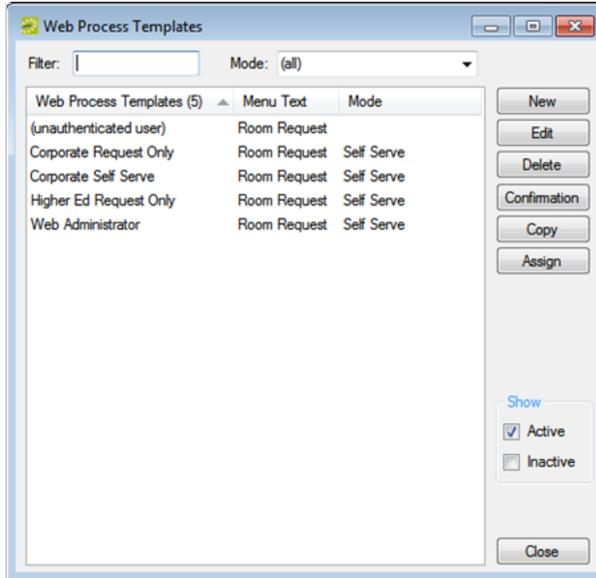
## Configure a Web Process Template

In EMS Enterprise, the (unauthenticated user) web process template is always available and you can have an unlimited number of other web process templates. In EMS Professional, the (unauthenticated user) web process template is always available, but you can have only two additional web process templates. An unlimited number of web process templates is not allowed in EMS Professional.

1. On the EMS menu bar, click Configuration > Web > Web Process Templates. The Web Process Templates window opens. The window lists the one web process template (unauthenticated user) that is defined by default for any VEMS implementation as well as any other active web process templates

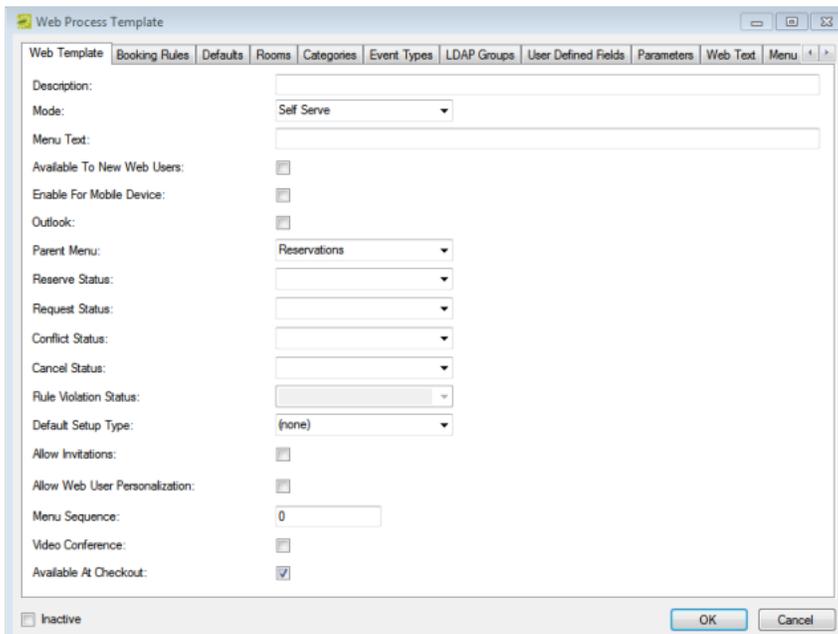
that have been defined for your VEMS implementation. The window also lists the currently defined value for the menu text that is associated with each template.

Tip: The menu text is the text or link that a VEMS user sees when requesting a room using a web process template. This is discussed in detail later in this section.



Tip: Optionally, to view all web process templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Web Process Template dialog box opens. The Web Template tab is the active tab.



Tip: If you are editing a web process template, then the Web Template tab is available for all web process templates other than the unauthenticated user template. If you selected unauthenticated user, then the Booking Rules tab is the active tab when the dialog box opens.

3. Enter the information for the new web process template as needed.
4. Click OK. The changes to the web process template are saved. For a web user to be able to view and use this template, you must assign the user to the template. See [Configure Web Users](#).

## Web Template Tab

1. Enter the information for the new template.

FIELD	DESCRIPTION
Description	Read-only information.
Mode	<p>Determines how a user can make a reservation in VEMS.</p> <ul style="list-style-type: none"> <li>• Request – Web users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not provide options for the web user to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS client user. The room is not taken out of inventory until this step has occurred.</li> </ul> <p>Note: Starting in the January 2016 release, the "Request" mode is only available to the unauthenticated process template. It will no longer be selectable when creating/editing a process template. Any previous "Request" templates will be inactivated when EMS is updated to this version.</p> <ul style="list-style-type: none"> <li>• Self Serve – Registered web users can view real-time room availability (in list or grid views) and create actual reservations in the EMS database. Rooms can be booked in a confirmed or request status based on your configuration and business process.</li> </ul> <p>Note: You must select this option if the web users who are attached to this web process template must be able to request rooms that have a video conferencing feature.</p>

FIELD	DESCRIPTION
	<ul style="list-style-type: none"> <li>Service Only Request – Allows web users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS.</li> </ul> <p>Note: Various settings within the Web Process template are enabled/disabled based on the selected mode.</p>
Menu Text	The menu text or link that a VEMS user sees when requesting a room using this web process template.
Available to New Web Users	Select this option if this web process template is to be automatically assigned to newly registered web users.
Enable for Mobile Device	Select this option if this web process template is to be available (in an appropriate format) on a mobile device browser.
Outlook	Enables the web process template for use with the EMS for Outlook module.
Parent Menu	The parent menu item on the VEMS main menu under which the name of this template appears.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reserveable' on the Rooms tab.
Request Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'requestable' on the Rooms tab.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by web users attached to this template that result in a conflict (the room is already booked).
Cancel Status	Available only for Self Serve mode. The default status that is applied to bookings that are canceled by web users who are attached to this

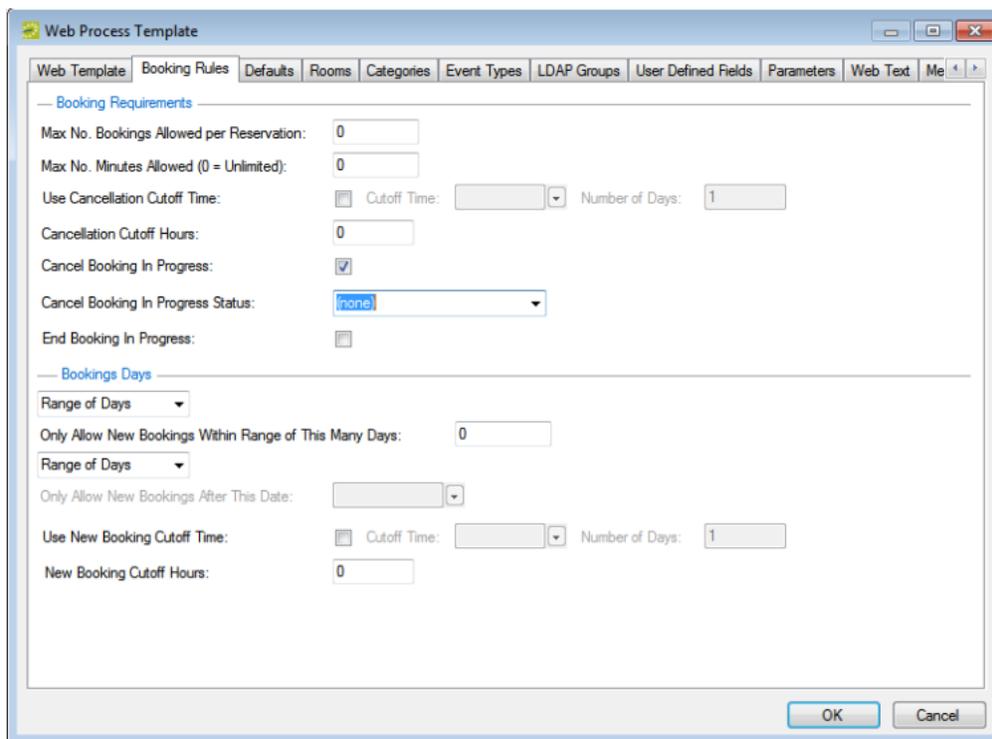
FIELD	DESCRIPTION
	template.
Rule Violation Status	Enabled only if Outlook is selected. Used in conjunction with the EMS for Outlook module. If you carry out an action in the EMS for Outlook module that violates a category date/time restriction, then the booking is changed to this status.
Default Setup Type	The setup type that is selected by default for a room search when a web user who is attached to this template is reserving a room in VEMS. The web user can always select a different value.
Allow Invitations	Enabled only if your organization has purchased the optional Plan a Meeting (PAM) module. Select this option if users who are attached to this template must be able to see the free/busy schedules of the attendees. The web user can choose a date and time that is convenient for all attendees and then send invitations through VEMS, which attendees receive and can manage through Outlook.
Allow Web User Personalization	Select this option if web users must be able to use the Options feature to customize their settings on VEMS pages.
Menu Sequence	Enter a number that indicates the order in which this menu option is relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first.  Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Video Conference	Select this option if the web users who are attached to this template must be able to request rooms that have a video conferencing feature.  Note: This option is available only for EMS Enterprise. It is not available for EMS Professional. To use the Video Conference option correctly with a web process template, the Self Serve Mode must be selected for the

FIELD	DESCRIPTION
	template.
Available at Checkout	Select this option if the web users who are attached to this template must be able to select category resource items on the VEMS "checkout page" (the last page in the Room Request process) in VEMS.

- Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See [Configure Web Users](#).

## Booking Rules Tab

- Open the Booking Rules tab.



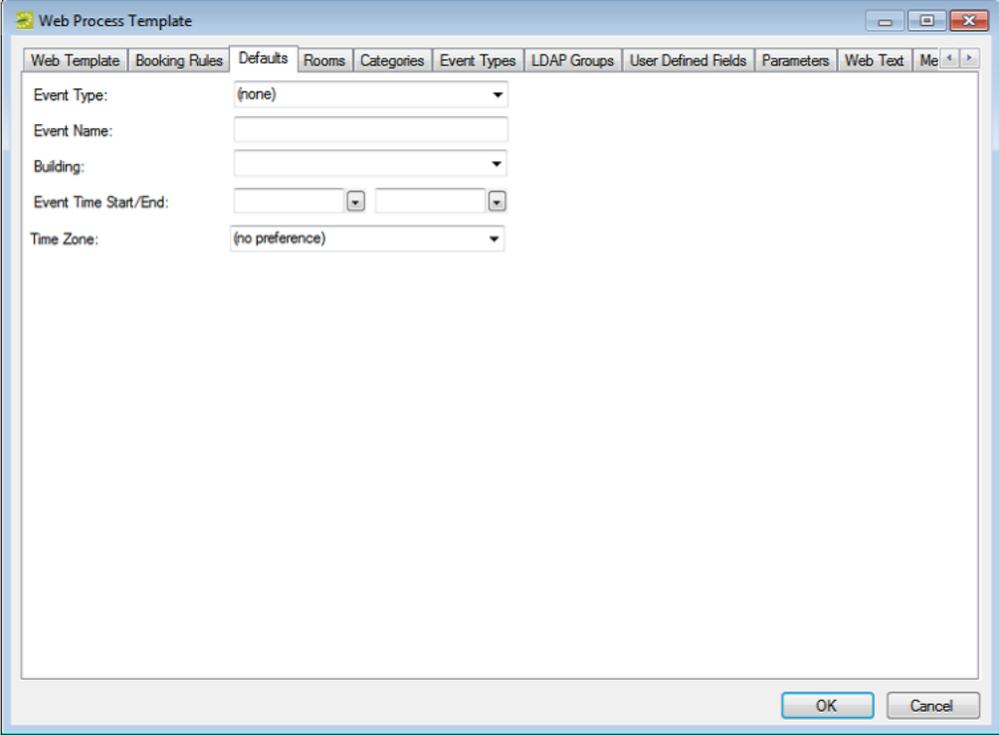
- In the Booking Requirements pane, do the following:
  - In the Max. No. Bookings Allowed Per Reservation field, enter the maximum number of bookings that a new reservation can contain.
  - In the Max. No. Minutes Allowed field, enter the maximum number of minutes for which a new reservation can be created. (This setting is not enforced when a user edits a booking.)

3. Use the time of day and number of days or the number of hours to dictate how far in advance of an event a booking can be canceled.
  - To use a specific cutoff time, select Use Cancellation Cutoff Time, and in the Cutoff Time and Number of Days fields, specify a time of day and a number of days, respectively. For example, if you enter 3 p.m. and one day, then cancellation must take place before 3 p.m. on the day before the event.
  - To use the number of hours instead of a specific time as a cutoff, clear Use Cancellation Cutoff Time and in the Cancellation Cutoff Hours field, specify a number of hours. For example, if you enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day.
4. Optionally, select one or both of the following:
  - Cancel Booking in Progress—A web user can cancel a booking that is currently in progress. If you select this option, then the Cancel Booking in Progress Status option is enabled. The status that you select here is applied to bookings that a web user cancels after the booking is already in progress.

Tip: If the appropriate status is not available, you can configure it. See .
  - End Booking in Progress—A web user can end a booking that is in progress early, which makes the room available to other web users.
5. In the fields in the Booking Days panel, indicate how far into the future bookings can be made and how much lead time is required to make a booking.
  - If you select Range of Days from the first dropdown menu, then you must also specify a value for Only Allow New Bookings within Range of This Many Days. If you select Specific Date, then you must specify a value for Only Allow New Bookings Prior to This Date to dictate the future range.
  - The second dropdown menu sets the lead time requirement. If you choose Range of Days, you must indicate a cutoff time or cutoff hours as you did for cancellations. (See Step 3 above.) If you choose Specific Date, you must select a date in the Only Allow New Bookings After This Date field.
6. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See [Configure Web Users](#).

## Defaults Tab

1. Open the Defaults tab.



The screenshot shows a 'Web Process Template' dialog box with the 'Defaults' tab selected. The dialog contains the following fields:

- Event Type: (none) [dropdown]
- Event Name: [text box]
- Building: [dropdown]
- Event Time Start/End: [dropdown] [dropdown]
- Time Zone: (no preference) [dropdown]

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

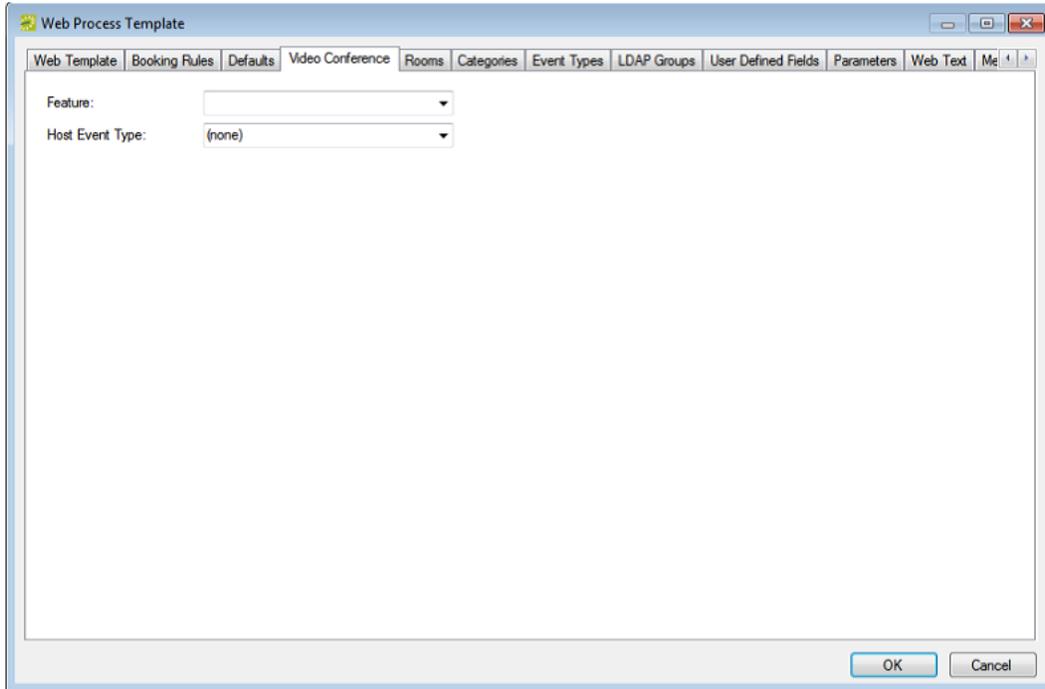
2. Enter the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone. These default values automatically populate the correct fields on the Room Requests page, but a user can edit them as needed.

Tip: If the appropriate event type is not available, you can configure it. If the appropriate building is not available, you can configure it.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See [Configuring Web Users](#).

## Video Conference Tab

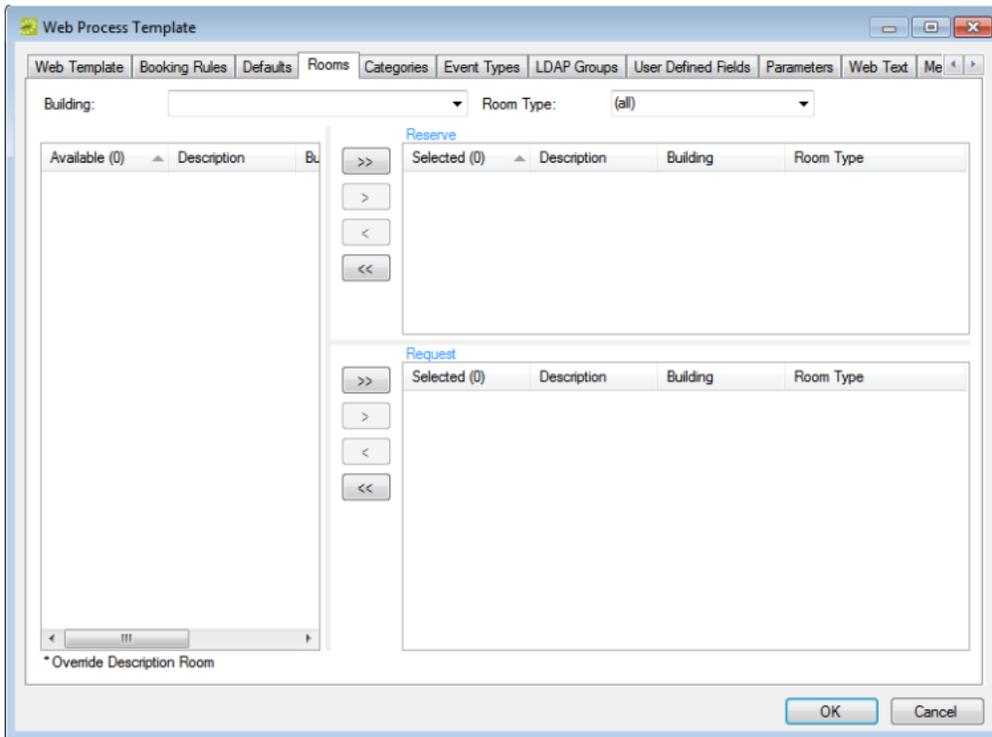
Tip: This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the Web Template tab.



## Rooms Tab

1. Open the Rooms tab.

Web Process Template dialog box, Rooms tab



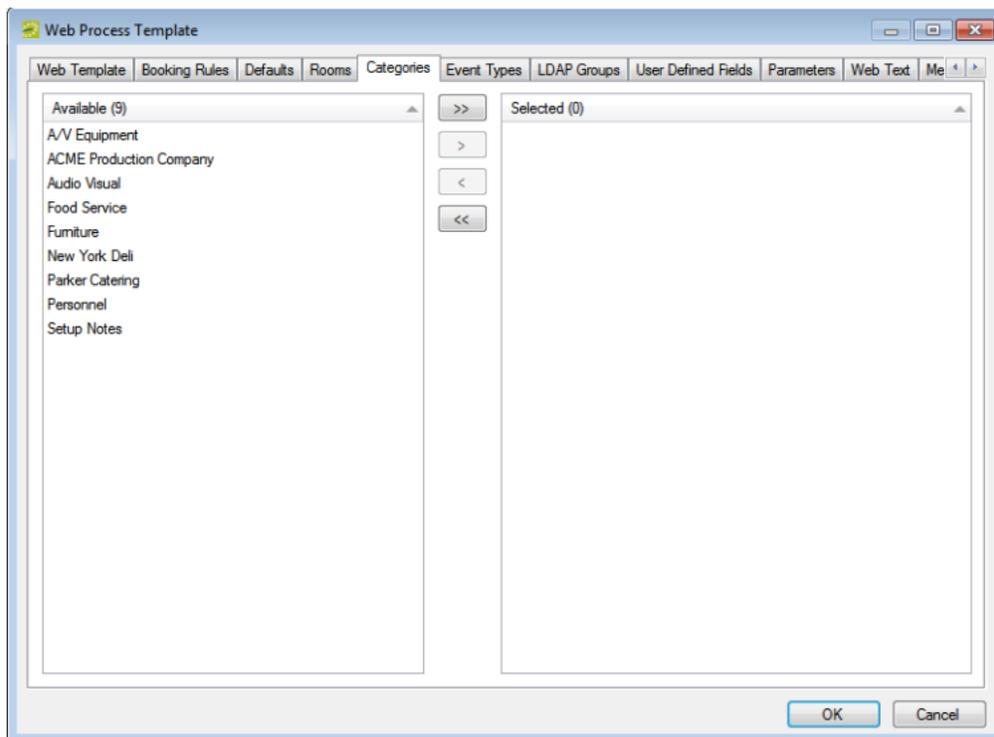
- Specify your Building and Room Type search criteria.

Tip: On the Building dropdown list, you have the option of selecting all buildings, just a specific building, an area, or a view. If any of the appropriate items are not available, you can configure them.

- On the Available list, select the room or CTRL-click to select the multiple rooms that users who are attached to this web template must be able to book, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.
  - Move rooms that can be reserved without approval (that is, booked into the Reserve Status on the Web Template tab) into the Reserve pane.
  - Move rooms that require approval (that is, booked into the Request Status on the Web Template tab) into the Request pane.
- Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template. See [Configuring Web Users](#).

## Categories Tab

- Open the Categories tab.



- On the Available list, select the category or CTRL-click to select the multiple categories that users who are attached to this web template must be able to add to a booking, and then click the Move

button (>) to move the selected categories to the Selected list.

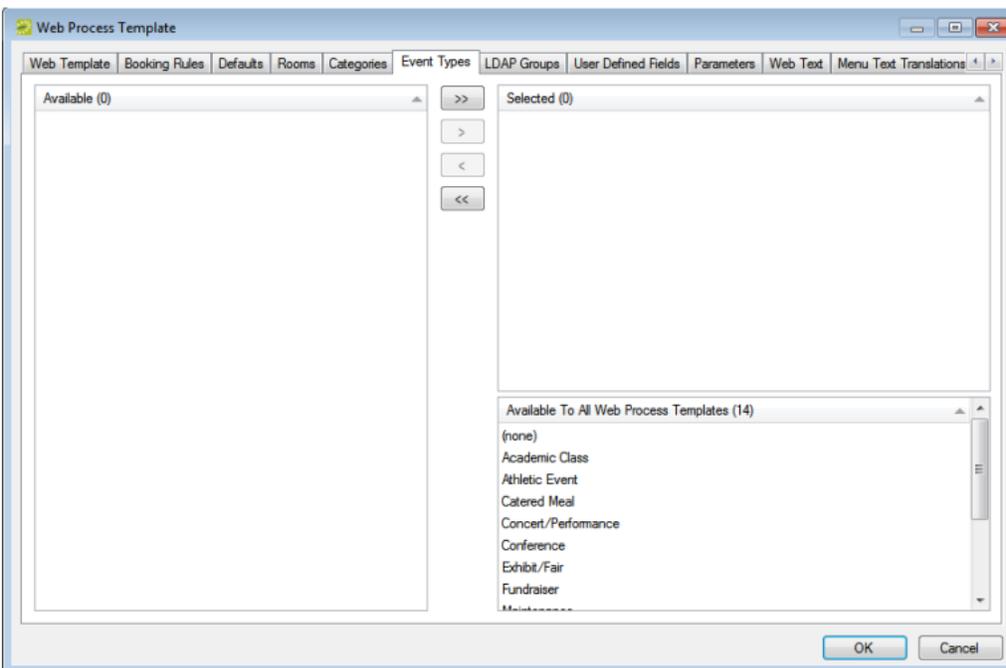
Tip: If the appropriate category is not available, you can configure it.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## Event Types Tab

1. Open the Event Types tab.

Web Process Template dialog box, Event Types tab



2. On the Available list, select the event type or CTRL-click to select the multiple event types that users who are attached to this web template must be able to select, and then click the Move button (>) to move the selected types to the appropriate Selected list.
  - Move the event types that apply only to this web process template into the Selected pane.

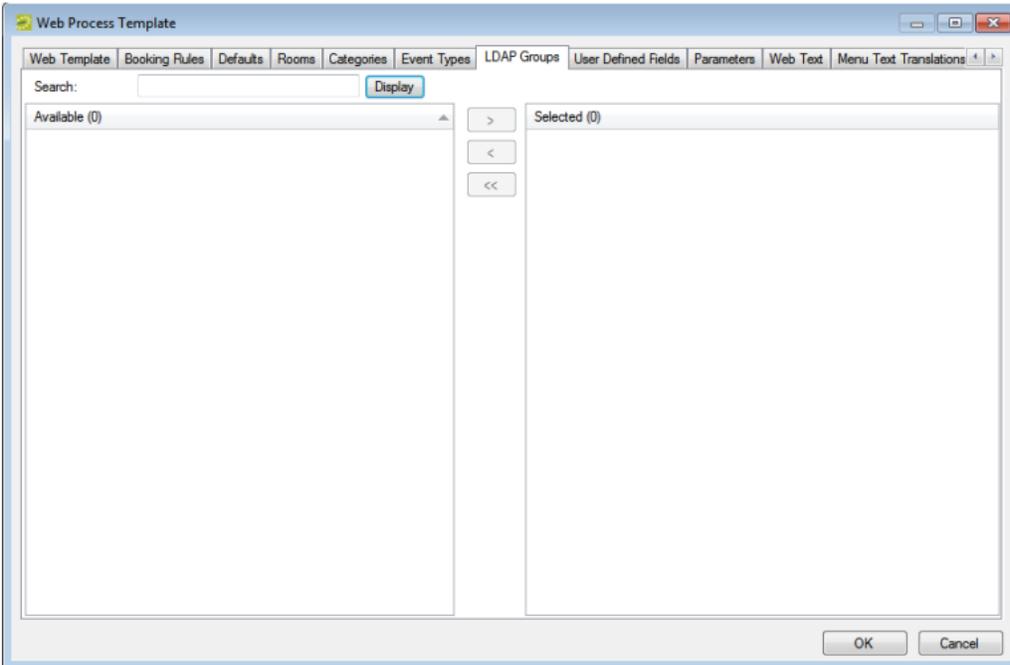
## LDAP Groups tab

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

Tip: Web process templates that are assigned via LDAP do not need to be explicitly assigned to web user records. When web users log in to VEMS, they “inherit” the web process templates based on the LDAP groups to which they belong.

1. Open the LDAP Groups tab.

Web Process Template dialog box, LDAP Groups tab

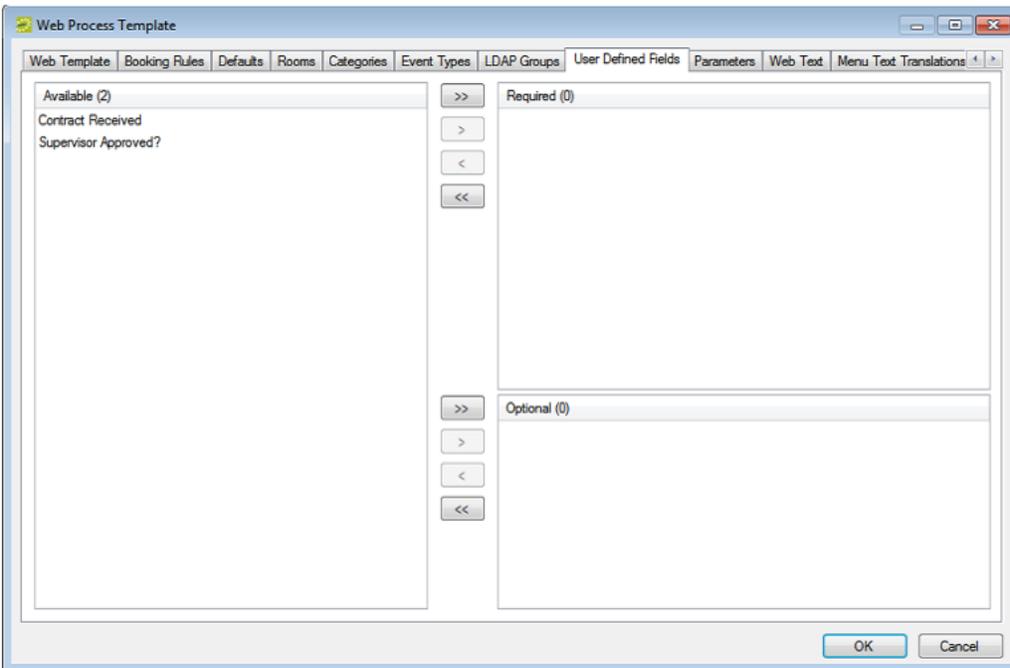


2. On the Available list, select the LDAP group or CTRL-click to select the multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## User Defined Fields Tab

1. Open the User Defined fields tab.

## Web Process template, User Defined Fields tab



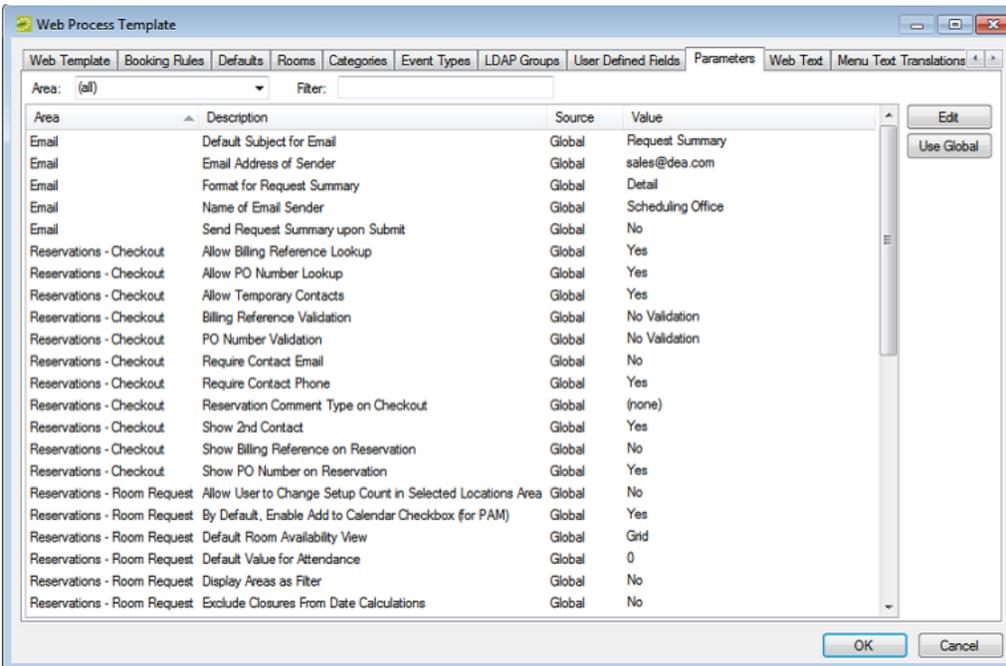
2. On the Available list, select the question or CTRL-click to select the multiple questions that users who are attached to this web template must answer when reserving space, and then click the Move button (>) to move the selected questions to the appropriate Selected list.
  - Move questions that require an answer into the Required pane.
  - Move questions that are optional into the Optional pane.

Tip: If the appropriate UDF is not available, you can configure it.

3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## Parameters Tab

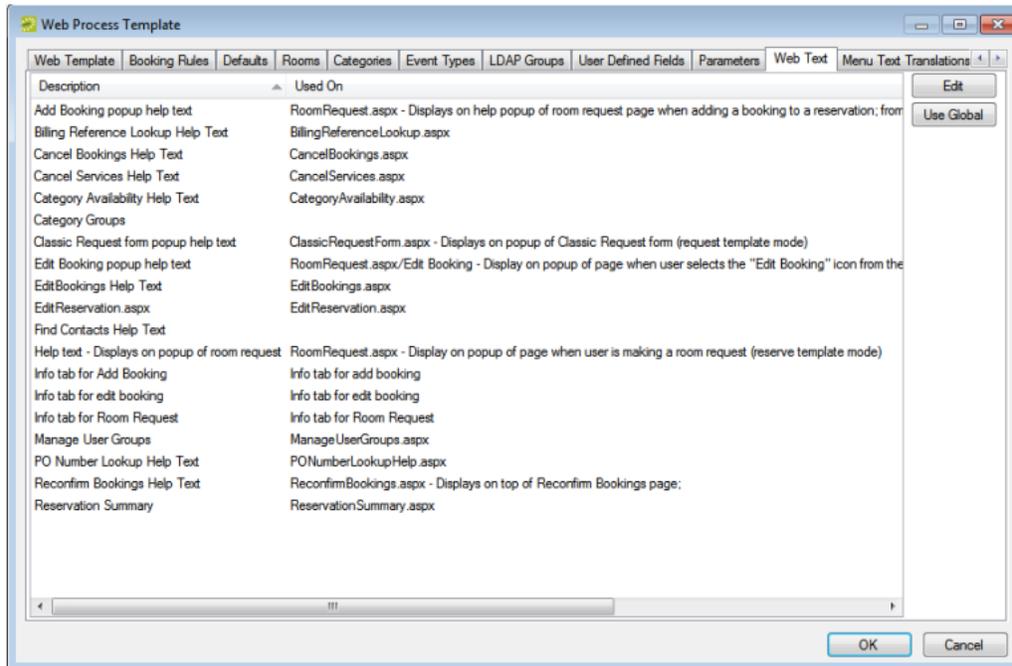
1. Open the Parameters tab.



- By default, a web process template inherits its parameter settings from the global list of VEMS parameters. (See "VEMS System Parameters".) You can review the values for these parameters, and edit the values as needed for the template.
  - To edit the value for a parameter, select the parameter, and then click Edit.
  - To reset the value for a parameter to its default global value, select the parameter, and then click Use Global.
- Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## Web Text Tab

- Open the Web Text tab.

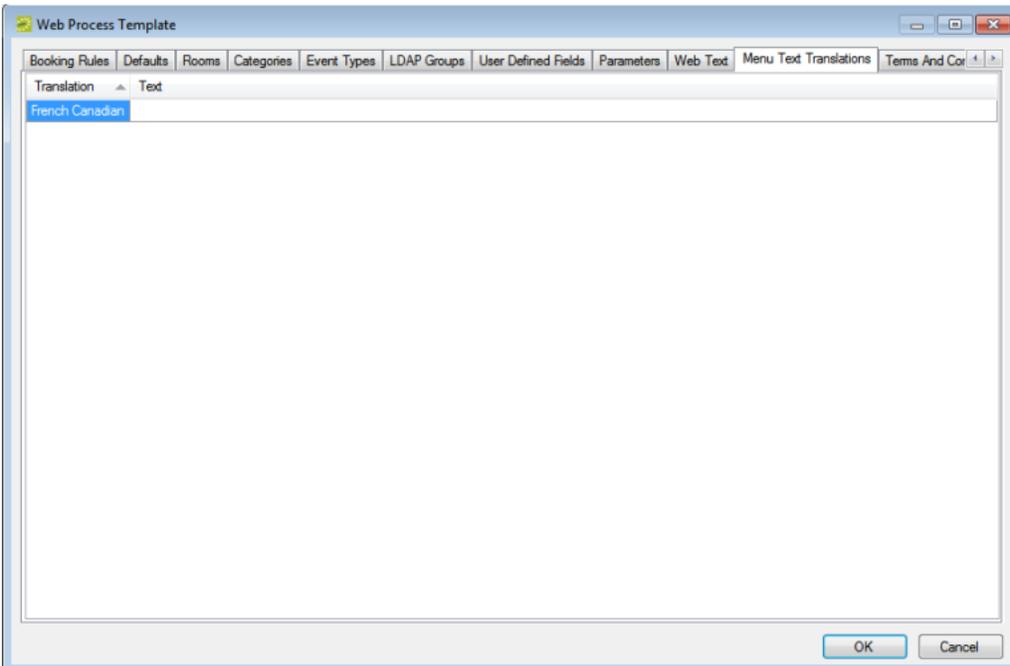


- By default, web text items inherit their settings from the global Web Text list. (See "Configuring Web Text".) You can use the list of web text items on the Web Text tab to override the settings for this particular template if needed.
  - To edit the value for a web text item, select the item, and then click Edit.
  - To reset the value for an item to its default global value, select the item, and then click Use Global.
- Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## Menu Text Translations Tab

Tip: You need to provide information on this tab only if a foreign language translation has been defined for web templates. See [Configure Web Cultures](#).

- Open the Menu Text Translations tab.

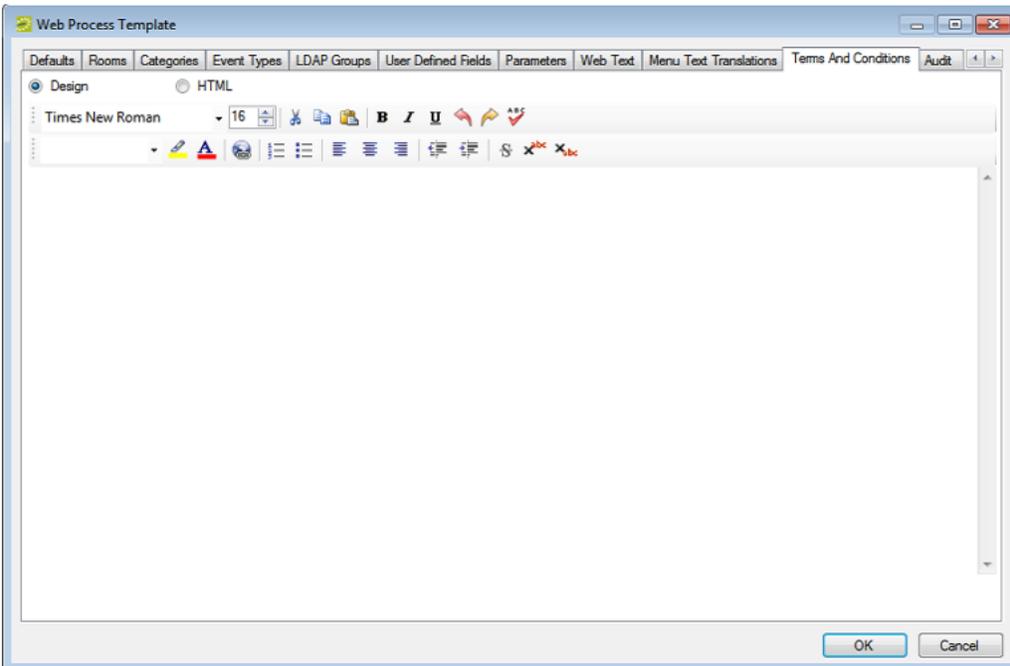


2. For each translation that is displayed on the tab, click in the Text field, and then enter the appropriate translation for the menu text (the menu text or link that a VEMS user sees when requesting a room using this web process template).
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## Terms and Conditions Tab

Before users can submit reservations through VEMS, they must agree to the Terms and Conditions that you specify on this tab.

1. Open the Terms and Conditions tab.



2. Format a Terms and Conditions message that is displayed in VEMS when a web user selects a room.
  - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.
  - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.
3. Continue with any other configuration for the templates as needed; otherwise, click OK to save the changes to the template. For a web user to be able to view and use this template, you must assign the user to the template.

## CHAPTER 10: Assign Web Templates to Multiple Web Users

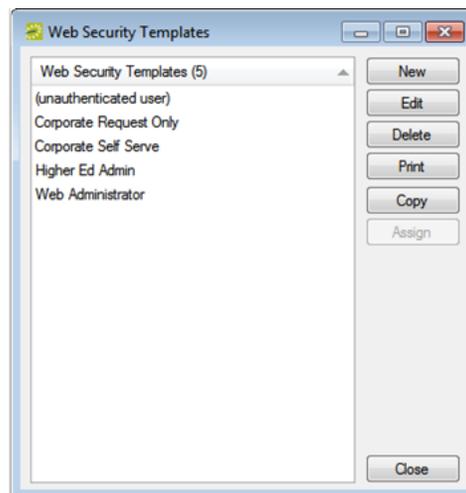
When you configure a web user, you have the option of assigning a web security template and a web process template to the web user. Instead of assigning web templates one at a time to individual users, you can assign multiple web templates to multiple users in a single step. You can assign any web security template other than the unauthenticated user template to multiple users who have the same status, and you can assign multiple web process templates to multiple web users who have database access.

This topic will provide information that will allow you to:

- [Assign a Web Security Template to Multiple Web Users](#)
- [Assign Multiple Web Process Templates to Multiple Users](#)

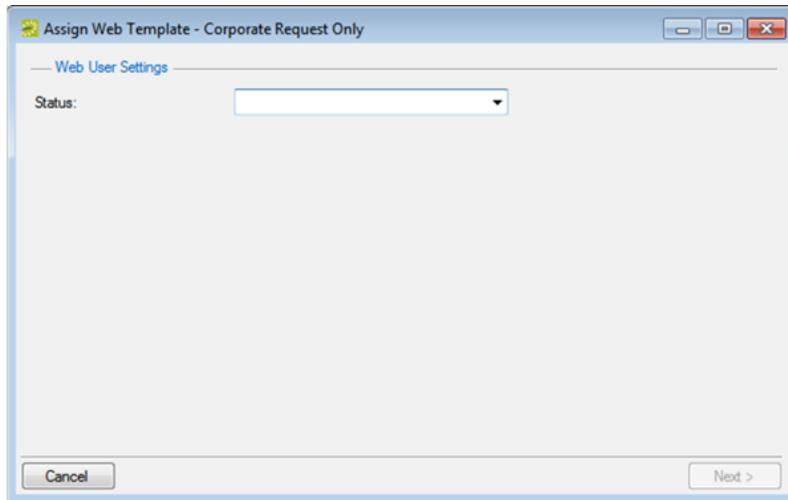
### Assign a Web Security Template to Multiple Web Users

1. On the EMS menu bar, click Configuration > Web > Web Security Templates. The Web Security Templates window opens. The window lists the one web user role (unauthenticated user) that is defined by default for any VEMS implementation as well as any other web security templates that have been defined for your VEMS implementation.

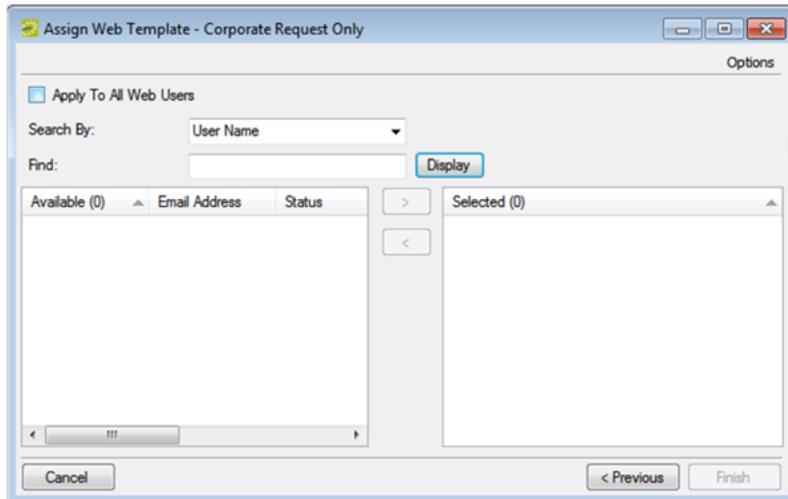


2. Select the web security template that you are assigning to multiple users, and then click Assign. The Assign Web Template window opens.

TIP: You can select any web security template other than the unauthenticated user template.



3. Select the web user status, and then click Next. The Assign Web Template window is updated with options for selecting the users to whom you are assigning the web template.



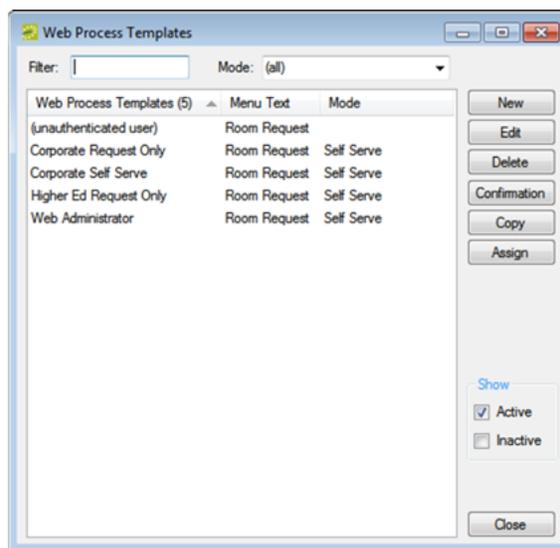
4. Do one of the following:
  - To assign the selected web security template to all the users that you selected in Step 3, click Apply to All Web Users, and then go to Step 7.
  - To assign the web security template to only specific users that you selected in Step 3, search for the users by doing one or both of the following, and go to Step 5.
    - In the Search By field, leave the default of User Name or select Email Address.
    - To further filter the displayed search results based on either the User Name or Email Address, in the Find field, enter a search string.

TIP: The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bob.worth@ems.com but not dbobbett@ems.com.

5. Click Display. The web users who meet your search criteria are displayed in the Available list.
6. On the Available list, select the user, or CTRL-click to select the multiple users to whom you are assigning the template, and then click the Move button (>) to move the selected users to the Selected list.
7. Click Finish. A message opens indicating that the web template was assigned successfully.
8. Click OK to close the message and return to the Web Security Templates window.

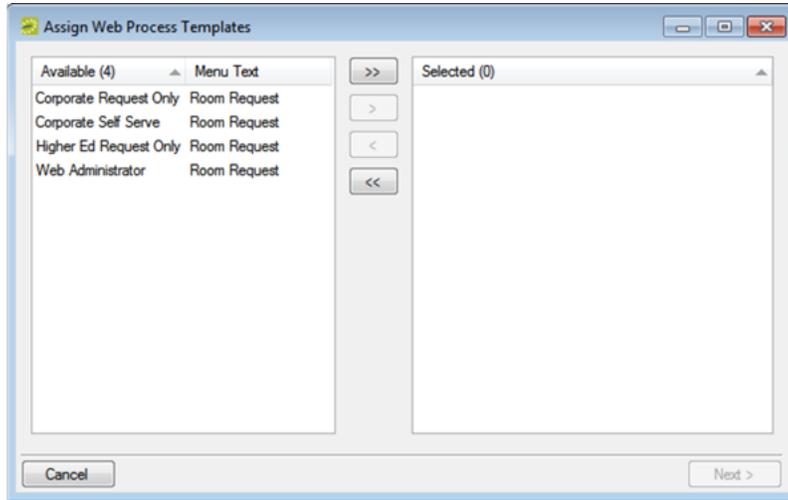
## Assign Multiple Web Process Templates to Multiple Users

1. On the EMS menu bar, click Configuration > Web > Web Process Templates. The Web Process Templates window opens. The window lists the one web process template (unauthenticated user) that is defined by default for any VEMS implementation as well as any other web process templates that have been defined for your VEMS implementation and that have a status of Active.

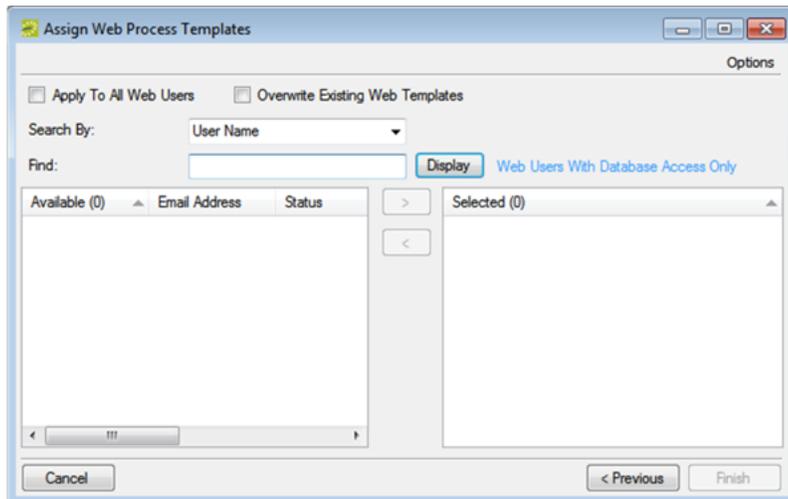


TIP: Optionally, to view all web process templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click Assign. The Assign Web Process Templates window opens. All the available web process templates for your VEMS implementation are displayed in the Available list.



3. On the Available list, select the template or CTRL-click to select the multiple templates that are to be assigned to multiple web users, and then click the Move button (>) to move the selected templates to the Selected list.
4. Click Next. The Assign Web Process Template window is refreshed with options for selecting users to whom you are assigning the web templates.



5. Do one of the following:
  - To assign the selected web process templates to all web users, click Apply to All Web Users, and then go to Step 8.
  - To assign the selected web process templates to only specific users search for the users by doing one or both of the following, and then go to Step 6.
    - In the Search By field, leave the default of User Name or select Email Address.
    - To further filter the displayed search results based on either the User Name or Email Address, in the Find field, enter a search string.

TIP: The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, if searching by Email Address, a search string of bob returns bob.worth@ems.com but not dbobbett@ems.com.

6. Click Display. The web users who meet your search criteria are displayed in the Available list.
7. On the Available list, select the user or CTRL-click to select the multiple users to whom you are assigning the web process templates, and then click the Move button (>) to move the selected users to the Selected list.
8. Optionally, to replace any web process templates that are currently assigned to the users with the web process templates that you selected in Step 3, click Overwrite Existing Templates.

TIP: If you do not select Overwrite Existing Templates, then the templates that you selected in Step 3 are appended to the list of templates that are already assigned to the users.

9. Click Finish. A message opens indicating that the web template was assigned successfully.
10. Click OK to close the message and return to the Web Process Templates window.

## CHAPTER 11: Configure Web Text

Web text is custom help text of policies and procedures that are specific to your organization that is displayed on various pages in VEMS and EMS Kiosk. As the EMS administrator, you can configure this web text in EMS, or if you are assigned to an appropriate web security template (one that has web administrator access), you can configure it directly in VEMS.

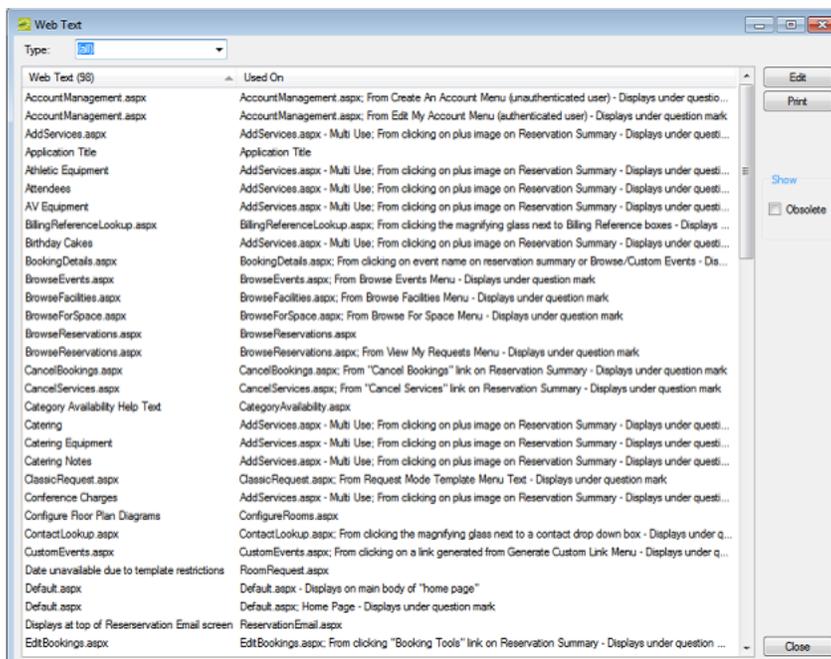
This topic will provide the following information that will allow you to:

- [Configure Web Text in EMS](#)
- [Configure Web Text in VEMS](#)

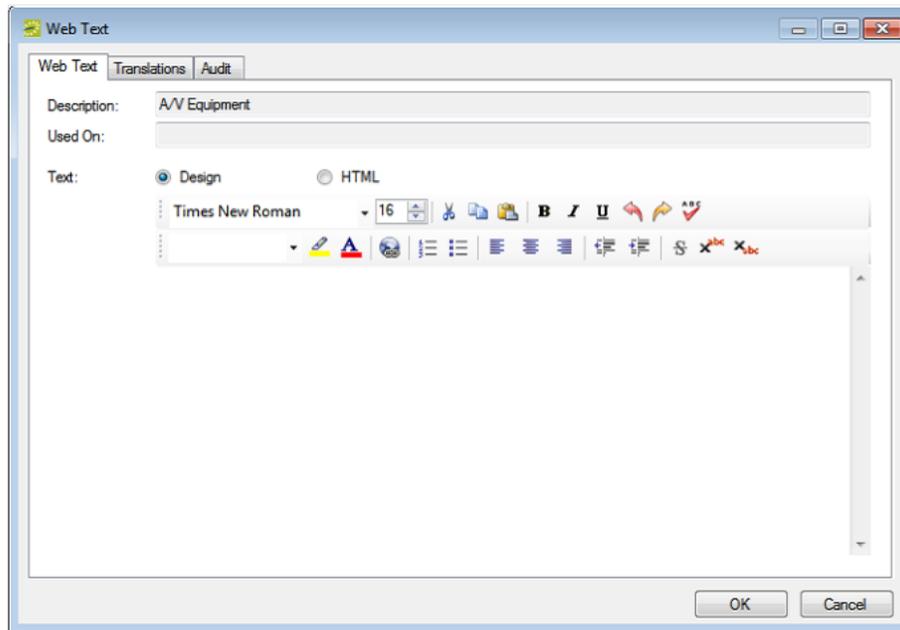
### Configure Web Text in EMS

1. On the EMS menu bar, click Configuration > Web > Web Text. The Web Text window opens. This window lists the name or description for all types of web text that is currently in use in your VEMS and EMS Kiosk installations and the VEMS or EMS Kiosk page on which it appears.

TIP: To show only a specific type of web text, select a type on the Type dropdown list. Optionally, to view all web text, whether in use or not, click Obsolete. Obsolete web text is displayed in red and italics in the Web Text window.



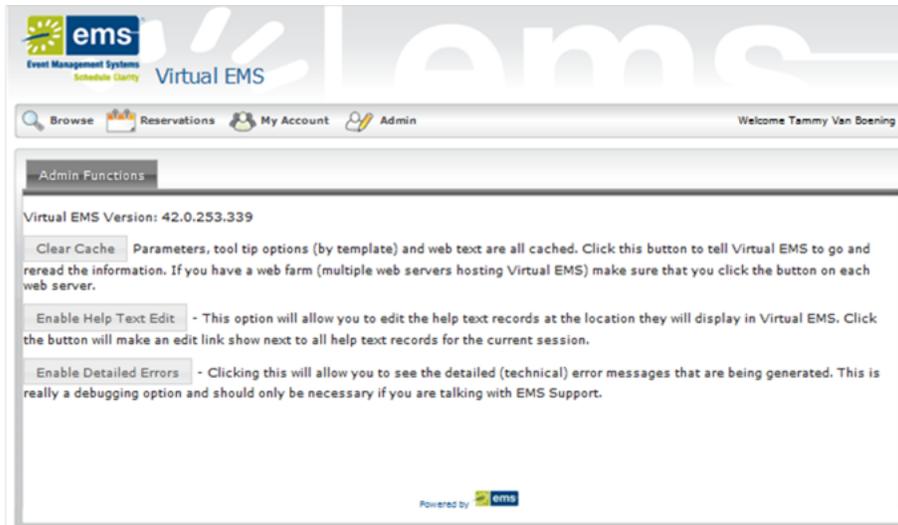
2. Select the web text that you are configuring, and then click Edit. The Web Text dialog box opens. The Web Text tab is the active tab. The tab contains options for entering and configuring the web text.



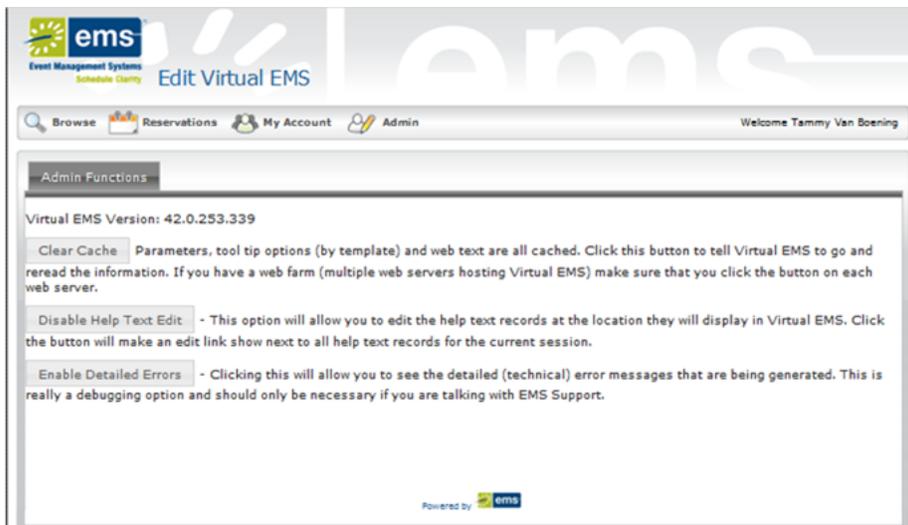
3. Configure the needed web text.
  - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the web text.
  - Select HTML and enter the necessary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

## Configure Web Text in VEMS

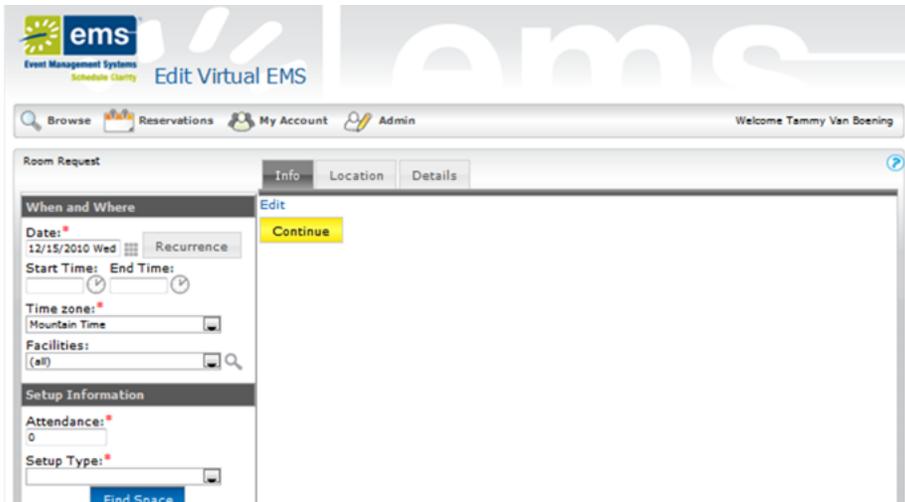
1. Log in to VEMS.
2. Under Admin, click Admin Functions. The VEMS Admin Function page opens.



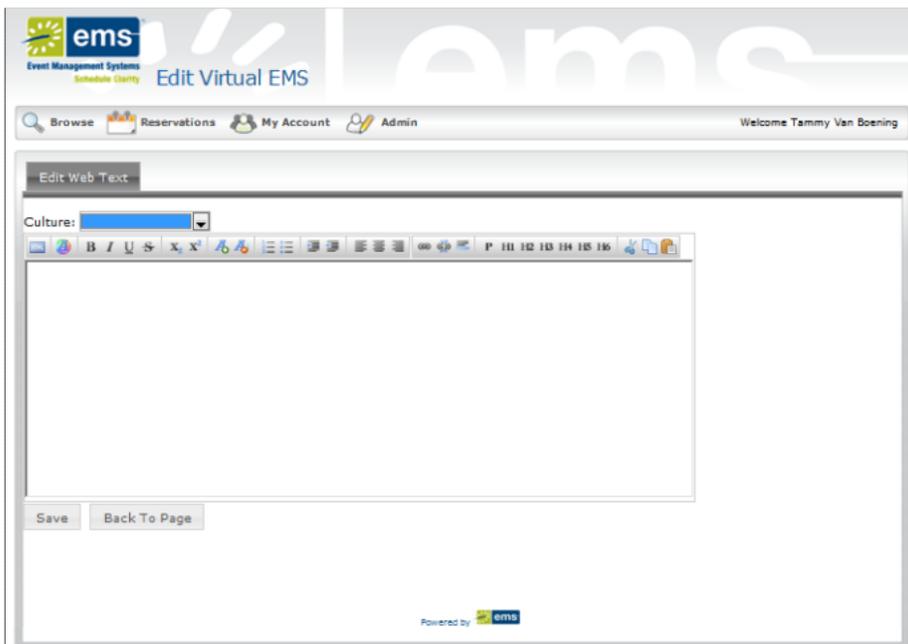
3. Click Enable Help Text Edit. A popup window opens indicating that Help Text Mode is now enabled.
4. Close the popup window. The Help Text toggle on the Admin Functions page now reads Disable Help Text Edit.



5. Open the VEMS page where you are configuring the Help text. An Edit option is displayed at the top of the page.



- Click Edit. The page is refreshed with options for entering and configuring the Help text.



- After entering and configuring the Help text, click Save to apply the text to the selected page.
- After you click Save, click Back to Page to view the Help text on its selected page.

## CHAPTER 12: Configure Web Menus

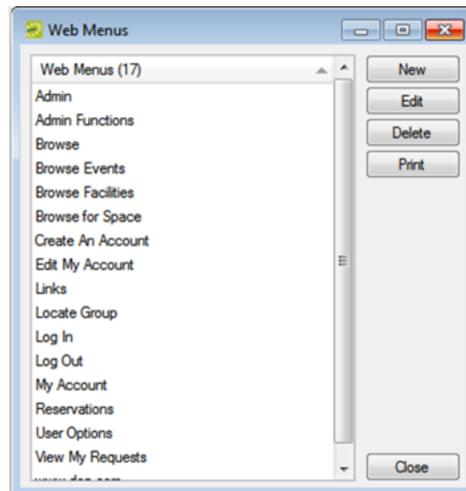
When VEMS is first installed, the main menu has a default layout that determines the following:

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

You can add your own user-defined options to the main menu or child options to a parent menu. These items can be links to VEMS pages or to websites outside VEMS.

1. On the EMS menu bar, click Configuration > Web > Web Menus. The Web Menus window opens. This window lists all the current parent menu items and child options in alphabetical order.

Web Menus Window



2. Click New. The Web Menu dialog box opens. The Web Menu tab is the active tab.

Web Menu dialog box, Web Menu tab

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

FIELD	DESCRIPTION
Menu Text	The text for the item as it is to appear on the VEMS menu.
Sequence	Enter a number that indicates the order in which this menu option is to appear relative to other parent menu items or relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first.  Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Link	Enter the URL, or web address, for the link, for example, <a href="http://www.myorganization.com">www.myorganization.com</a> .
Parent Menu	Select the parent menu (the menu under which the item is found) for the item. If this item is to be a new parent menu item, then select (none).
New Window	Select this option if the destination for this new menu item is to open in a new browser window (with VEMS remaining open behind the new window).
Authenticated Users Only	Select this option if access to this new menu item is to be restricted to only those users who have logged in to VEMS.

4. If translations have been defined for web templates (see [Configure Web Cultures](#)), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the menu item.
5. Click OK. The Web Menu dialog box closes. You return to the Web Menus window with the newly configured menu option displayed in the window.

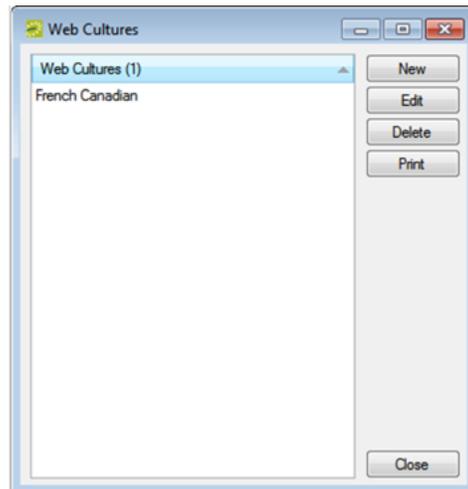
Tip: If you have VEMS open, you might have to log out and then log back in to see the new menu item.

## CHAPTER 13: Configure Web Cultures

If you need to add language translation capability for your web templates or kiosk pages (menu text, menu items, and web text items), then you must configure web cultures. Each web culture represents a foreign language for which translations must be provided in VEMS or EMS Kiosk.

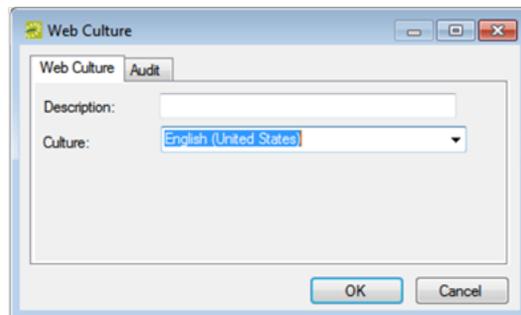
1. On the EMS menu bar, click Configuration > Web > Web Cultures. The Web Cultures window opens. This window displays all the web cultures that are currently configured in your EMS database.

Web Cultures window



2. Click New. The Web Culture dialog box opens. By default, the culture is set to English (United States).

Web Culture dialog box



3. In the Description field, enter a name or description for the new web culture.

Tip: The description can be a maximum of 50 characters, including spaces.

4. On the Culture dropdown list, select the appropriate culture (the language into which the menu text, menu items, and web text items will be translated).

5. Click OK. The Web Culture dialog box closes. You return to the Web Cultures window with the newly configured web culture automatically selected.

Tip: After you configure a web culture, it is displayed on the Translations tab in various configuration areas in EMS.

## CHAPTER 14: Customize VEMS

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 see your EMS Desktop Client Configuration 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.

### To Customize 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 see your EMS Desktop Client Configuration 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.

<b>18</b>
8:00 AM - 9:00 AM Town Hall
9:00 AM - 10:00 AM VTC

Roll Up To Reservation Enabled

<b>18</b>
8:00 AM - 9:00 AM MT Town Hall DEN - Multi-Purpose 1208A
9:00 AM - 10:00 AM AM MT VTC DEN - Conference 1105
10:00 AM - 11:00 AM AM CT VTC CHI - Shary's Office
11:00 AM - 12:00 PM ET VTC NY - VTC 3650

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.

```

Generate Link
http://localhost/Virtual42/CustomBrowseEvents.aspx?data=2BjcpFiaAHpclCkCVt43VbCUQ6OjIP0g9wRfUMansn%2bXCgp5CHHKugxi%2fnBTnjBeRGj8L8VrM%2f74syZNPVO64AEHMTZZRHw
<a href="http://localhost/Virtual42/CustomBrowseEvents.aspx?data=2BjcpFiaAHpclCkCVt43VbCUQ6OjIP0g9wRfUMansn%2bXCgp5CHHKugxi%2fnBTnjBeRGj8L8VrM%2f74syZNPVO64AEHMTZZRHw" target="_blank">http://localhost/Virtual42/CustomBrowseEvents.aspx?data=2BjcpFiaAHpclCkCVt43VbCUQ6OjIP0g9wRfUMansn%2bXCgp5CHHKugxi%2fnBTnjBeRGj8L8VrM%2f74syZNPVO64AEHMTZZRHw</a>
    
```

## Customize 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:

1. Enable Custom JavaScript.
  - a. Open the VEMS web.config file (i.e., C:\inetpub\wwwroot\VirtualEms\web.config).
  - b. Locate the following node under the <appSettings> node
    - i. <add key="allowCustomJs" value="false" />
2. Change the false value to true.
3. Save the file.
4. 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 want to include your custom JavaScript on (such as RoomRequest.js, EditReservation.js, or Default.js).
- In the newly created CustomJs folder, create one file called global.js that will be included on every page in the system.

Your custom JavaScript should be included on global.js or on each of the applicable page-specific JavaScript files. If you include the script in both places, it could cause problems.

## CHAPTER 15: Configure Integration Authentication for VEMS

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. This guide lists the steps you must take to configure these Integrated Authentication options for Virtual EMS. If you are unsure whether your organization is licensed for Integrated Authentication or you would like to learn more about it, please contact your Account Executive.

- **Option 1 (Recommended):** Search the Knowledge Base available in the EMS Customer Portal.
- Option 2: Submit a Case directly via the EMS Customer Portal.
- **Option 3:** Email [support@emssoftware.com](mailto:support@emssoftware.com).
- **Option 4 (Recommended for critical issues only):** Phone (800) 288-4565.

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

## CHAPTER 16: Manage Web Users For Integrated Authentication

In order to make a reservation in Virtual EMS, a user must have an active Web User account with appropriate room request privileges. Several options exist to create Web User accounts within EMS.

### Manual Web User Accounts Creation

Web User accounts can be created manually by EMS Administrators within EMS or by anonymous Web Users on Virtual EMS themselves. For information on how to create Web User accounts in EMS or how to configure Virtual EMS to allow anonymous Web Users to request an account, please refer to the EMS Setup Guide.

Important: When manually creating a Web User account in an Integrated Authentication environment, you must specify a value in the Web User Network ID field or the External Reference field. 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.

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

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

### Automatic 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.

### VEMS Parameters

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

AREA	DESCRIPTION	VALUE
Account Management	Default Security Template for User	Must be specified
Account Management	Security Status for User	Active

## Portal Authentication Parameters

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	Must be specified
Authentication	Portal Authentication External Reference Variable	Must be specified
Authentication	Portal Authentication Fax Variable	Must be specified
Authentication	Portal Authentication Name Variable	Must be specified
Authentication	Portal Authentication Phone Variable	Must be specified

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 the user belongs to. This approach can be used in addition to or in lieu of the Web Process Template assignment approach discussed above. See the [LDAP Authentication](#) section 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.

## CHAPTER 17: 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. 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.

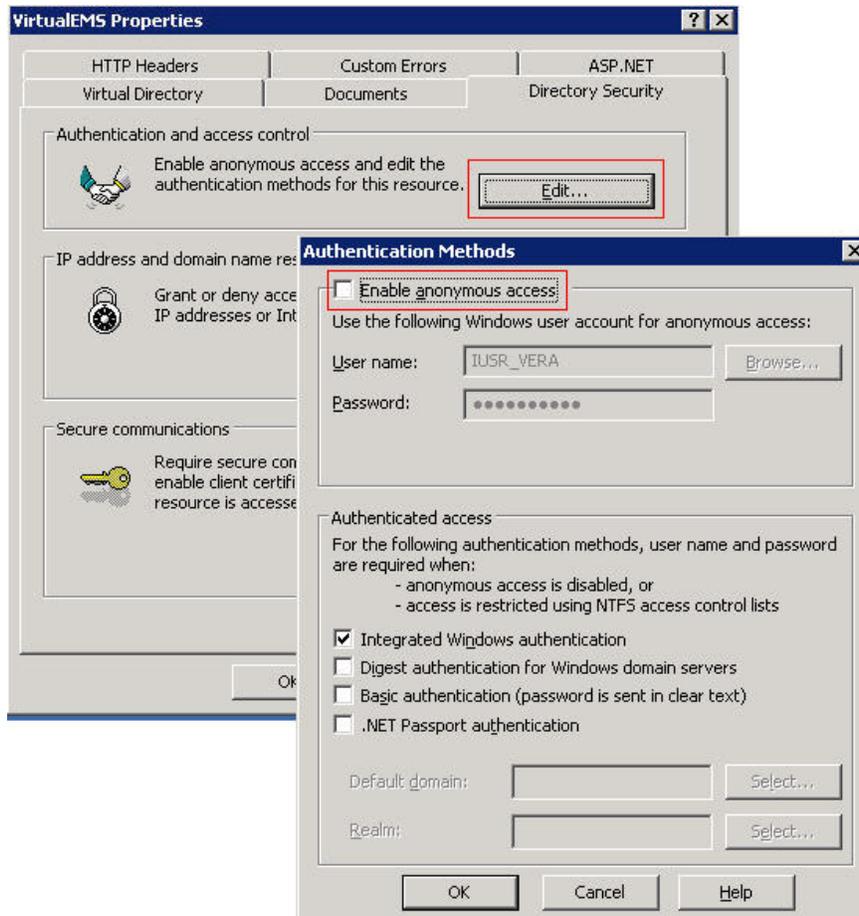
Note: The Field Used to Authenticate Web User Virtual EMS Parameter, within System Administration > Settings > Parameters (Virtual tab), is used by Virtual EMS to determine which value should be used for authentication.

This topic provides information on the following:

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

### Activate Integrated Windows Authentication for IIS 6.0

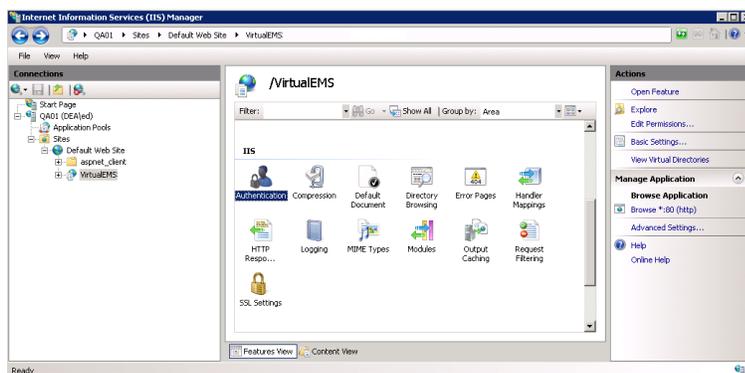
1. On the web server that hosts your Virtual EMS site, open IIS Manager.
2. Locate your Virtual EMS web site.
3. Right-click your Virtual EMS site and select Properties. The Properties screen will open.
4. From the Directory Security tab, click the Edit button under the *Authentication and access control*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



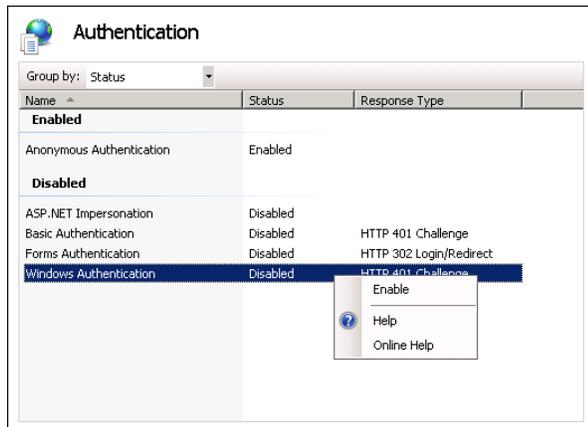
6. Click OK to exit the Authentication Methods screen. Click OK again to exit the Properties screen. You have completed the necessary IIS configuration steps for IIS 6.0.

## Activate Integrated Windows Authentication for IIS 7/8

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



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



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

## CHAPTER 18: 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`  
(replace [ServerName] with the name of your web server)

ems Virtual EMS  
Event Management Systems  
Schedule Clarity

Browse Reservations My Account Admin Help

Security Communication Options Core Properties Non-AD Config LDAP Queries Test Configuration

Authenticate users via LDAP?

Use LDAP to assign Process Templates - *uncheck this to just use LDAP for authentication*

Use advanced communication options (requires Communication Options configuration, typically NOT required for Active Directory)

Path for LDAP Query:  
LDAP://rootdse Example: LDAP://yourdomain.com (NOTE: You probably need to have "LDAP" in all caps). If using Communication Options, leave the LDAP:// off (i.e. yourdomain.com:port)

List of Domains: Separate with a comma, leave blank if in a single domain environment or in an environment where specifying domain for authentication is unnecessary

LDAP Domain\User: The user id of the account Virtual EMS will use when contacting Directory Services

LDAP Password: Supply only if you are updating (NOTE: It will be stored in an encrypted format)

Authentication Type:  
Secure Some directory services don't implement Secure binding. FastBind is a pretty common authentication type.

Save

Powered by ems

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.

## CHAPTER 19: 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, see [Portal Authentication Methods](#).

### Installation and 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	Server Variable

AREA	DESCRIPTION	VALUE
	Method	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

## CHAPTER 20: Portal Authentication Methods

This topic provides information on the following:

- [Server Variable Method \(Header Variable\)](#)
- [Server Variable Method – Federated \(SAML\)](#)
- [EMS Configuration](#)

### 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.

#### Steps to Configure, Method 1

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.

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.

## Steps to Configure, Method 2

This method can be common if there is already a server configured with a service provider in your environment, handling authentication for other applications. In EMS 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.

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 and click Edit.
  - b. Enter in the URL to your Remote Service Provider.
7. Configure your Remote Service Provider to send the user back to the default.aspx page of the web application that the request originated from.

## EMS 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 (e.g. 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 login 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. 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. An example using portal authentication is below.

### Code example:

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

## CHAPTER 21: Virtual EMS (VEMS) User Guide

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

### Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available in the EMS Customer Portal.
- Option 2: Submit a Case directly via the EMS Customer Portal.
- **Option 3:** Email [support@emssoftware.com](mailto:support@emssoftware.com).
- **Option 4 (Recommended for critical issues only):** Phone (800) 288-4565.

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

## CHAPTER 22: Get Started with Virtual EMS (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.

You can access VEMS through any standard Internet browser.

This topic provides information on the following:

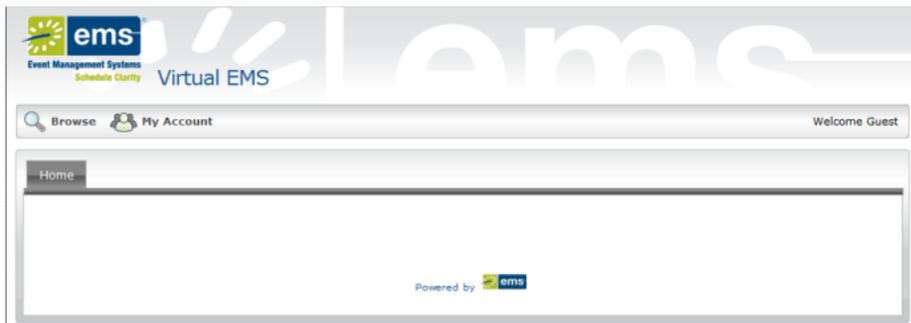
- [Log In to VEMS](#)
- [Log Out of VEMS](#)

### Log In to VEMS

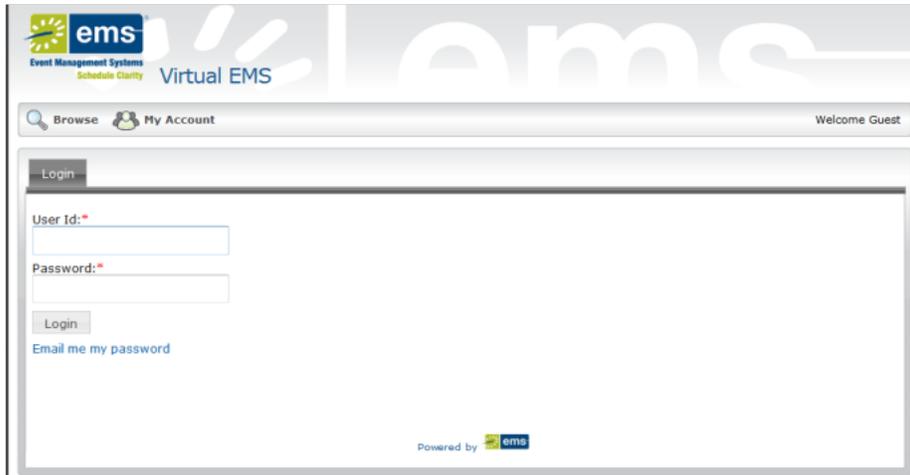
1. Open an Internet browser session.
2. In the browser's address field, enter the VEMS URL. The VEMS Default page opens.

Tip: Contact your EMS administrator if you need assistance.

The VEMS Default Page



3. Under My Account, click Log In. The VEMS Login page opens.



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.

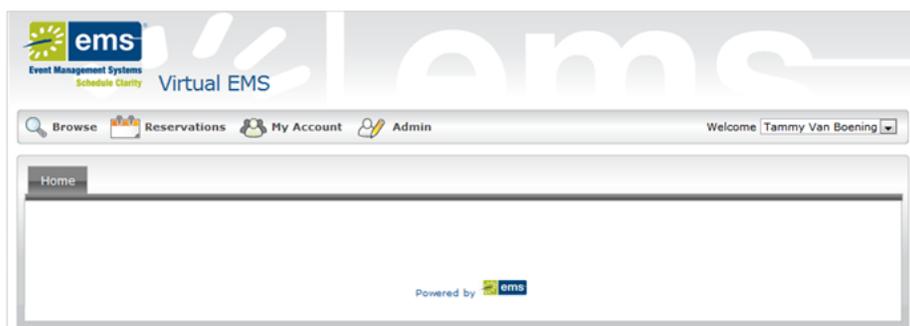
Tip: If you do not know your User ID, contact your EMS administrator. If you do not know your password, you can click Email me my password to have an email that contains your password automatically sent to your network email address.

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.

Tip: For information about creating a delegate, see [Create Delegate Accounts](#).

VEMS Home page



## Log Out of VEMS

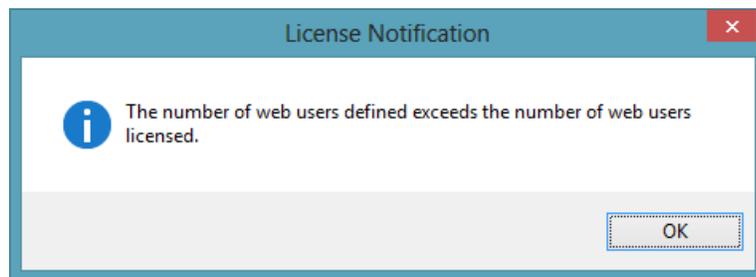
1. Under My Account, click Log Out.

## CHAPTER 23: Web User Licensing in VEMS

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

### License Notification Message

The following message will display when opening the EMS Desktop Client if the web user license has been exceeded:



### Inactivate Web Users

1. Navigate to Configuration > Web > Web Users.
2. Web users can be inactivated by hitting the Edit button on the Web Users screen and then setting the Status field to Inactive.

## CHAPTER 24: Browse Menu

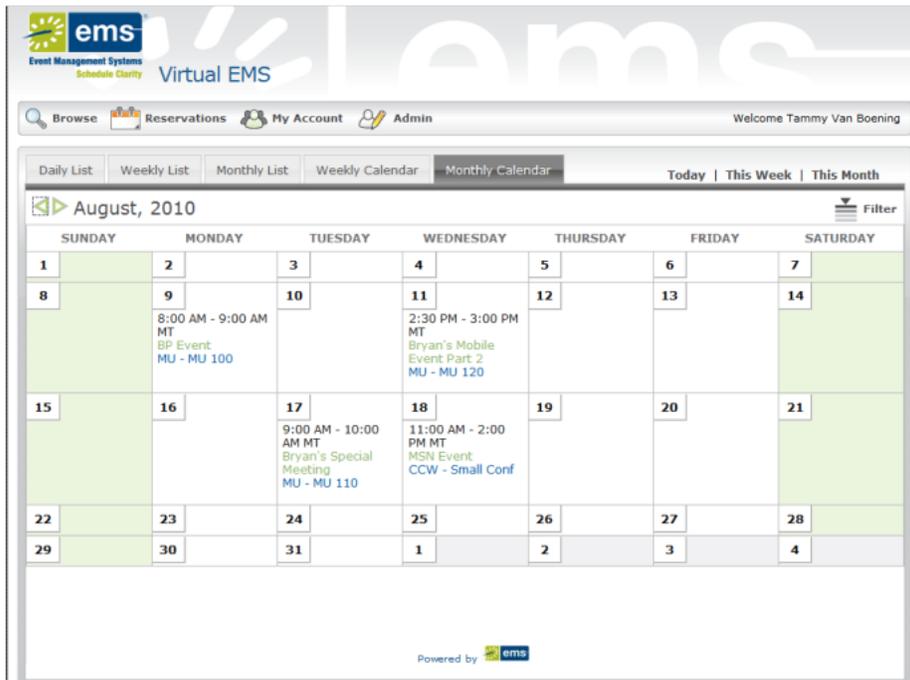
The Browse menu for VEMS contains options for browsing for events, browsing for facilities, browsing for space, and for locating groups. In VEMS, the Browse menu also contains an option for checking in individuals and checking out individuals to and from a building.

This topic covers the following topics:

- [Browse for Events](#)
  - [View Options in the VEMS Browse Window](#)
  - [Change the Page View](#)
- [Browse for Space](#)
- [Locate a Group](#)

### Browse 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, click Browse > Browse Events in the menu bar.

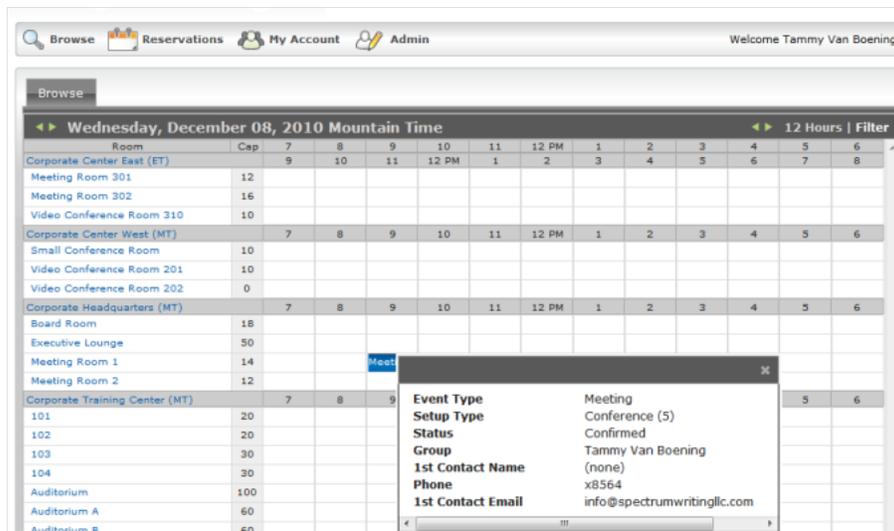


## View Options in the VEMS Browse Window

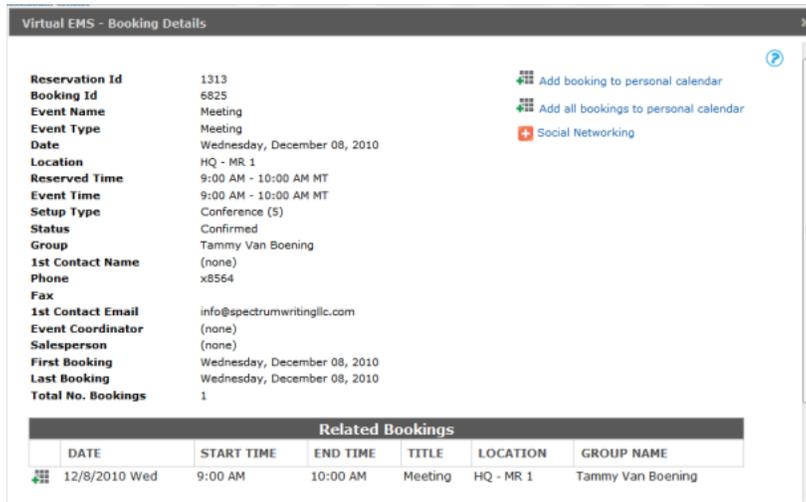
OPTION	DESCRIPTION
Daily List	Events that are scheduled for the current day's date in a list view.
Weekly List	Events that are scheduled for the current week (weeks always begin on a Sunday) in a list view.
Monthly List	Events that are scheduled for the current month in a list view.
Weekly Calendar	Events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

## Change the Page View

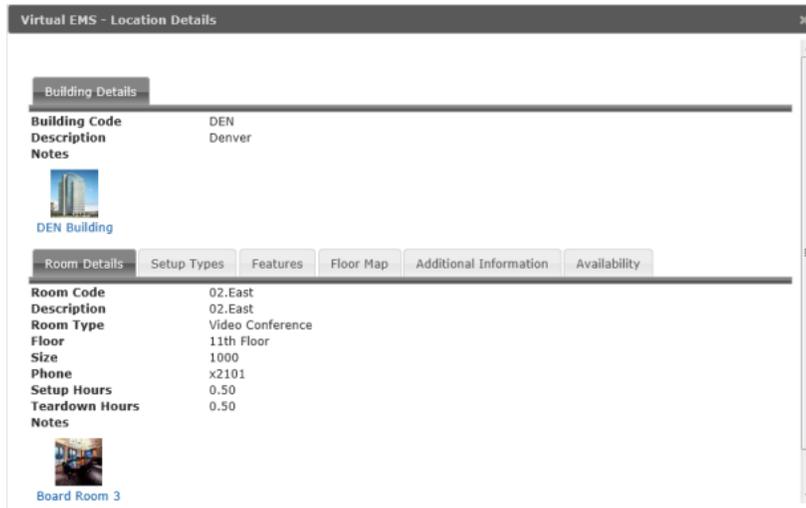
1. Place your cursor over the event entry (in a Calendar view) or the event title (in a list view) to open the Event Details popup, which displays information for the event.



2. 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.



- 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.



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

**Filters** ✕

Date:

Facilities:

Room:

Event Type:

Event Name:

Group Name:

Group Type:

Save

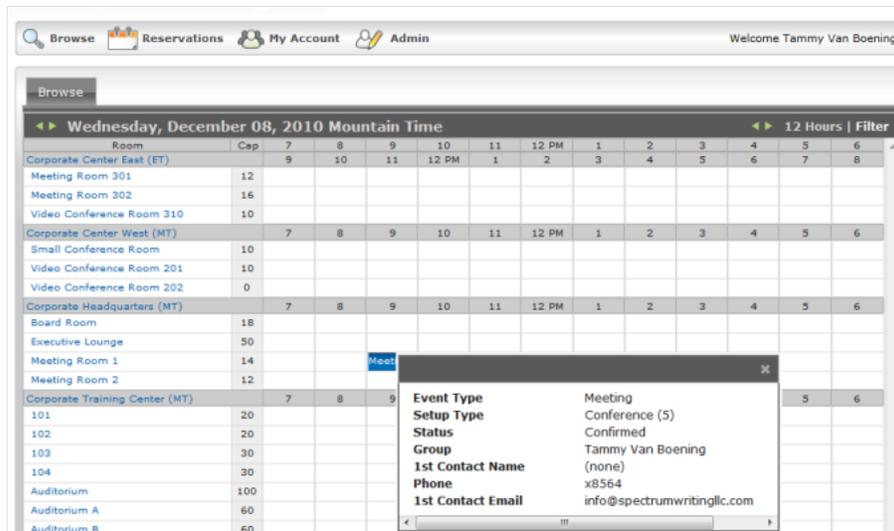
Tip: If you select Save and then click Apply, your filter settings are remembered the next time that you open the Browse Events page.

## Browse for Space

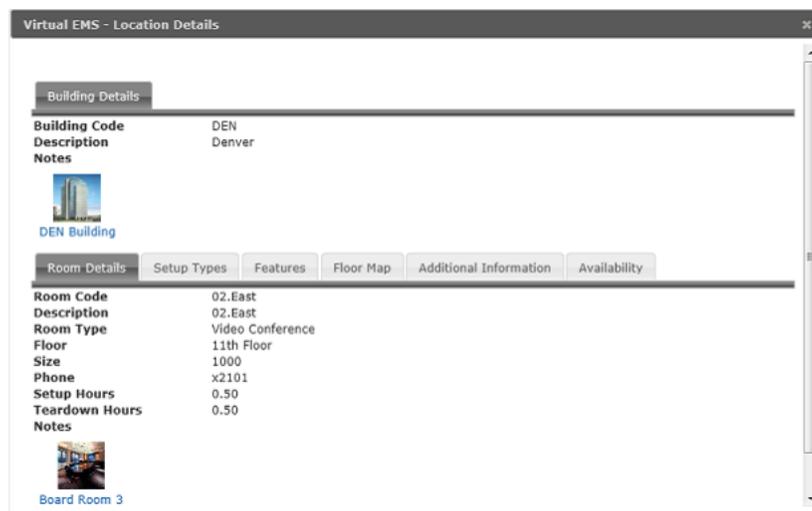
The Browse for Space page is a read-only page that displays all the rooms in your organization in which you can schedule an event along with the availability information for each room (based on the current day's date) in a grid view. To open the Browse Space page, click Browse > Browse for Space in the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

		Wednesday, December 08, 2010 Mountain Time											
		12 Hours						Filter					
Room	Cap	7	8	9	10	11	12 PM	1	2	3	4	5	6
<b>Corporate Center East (ET)</b>													
Meeting Room 301	12												
Meeting Room 302	16												
Video Conference Room 310	10												
<b>Corporate Center West (MT)</b>													
Small Conference Room	10												
Video Conference Room 201	10												
Video Conference Room 202	0												
<b>Corporate Headquarters (MT)</b>													
Board Room	18												
Executive Lounge	50												
Meeting Room 1	14			Meeting									
Meeting Room 2	12												
<b>Corporate Training Center (MT)</b>													
101	20												
102	20												
103	30												
104	30												
Auditorium	100												
Auditorium A	60												
Auditorium B	60												

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



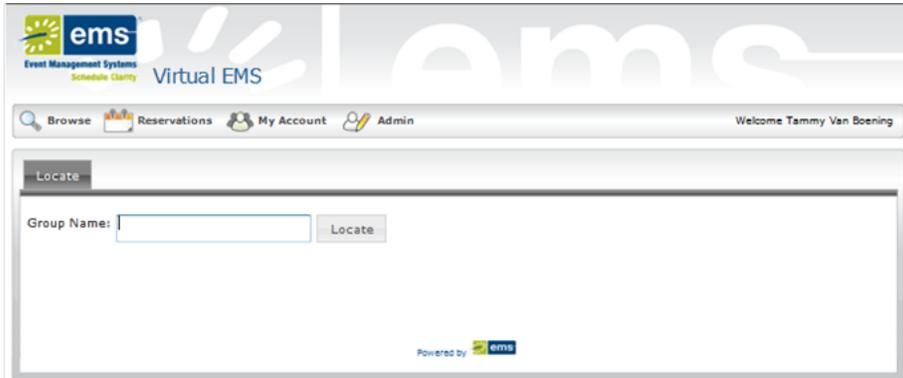
2. Click the Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been 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.



## Locate 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

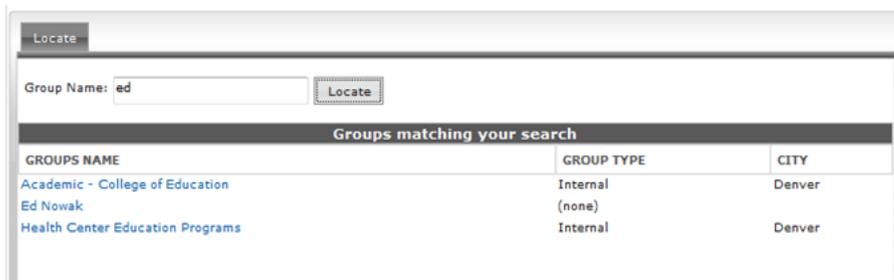
has purchased and installed the optional Floor Plan Module, then a Floor Plan icon might be displayed for a building. You can click this icon to open a floor plan for the selected building and view the location of the event’s room on the plan. To open the Locate Group page, click **Browse** > Locate Group in the menu bar.



- 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.

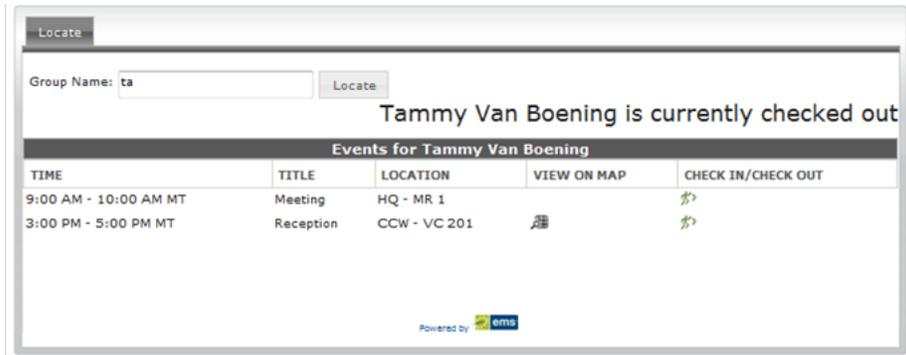
Tip: Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and can appear anywhere in the search results. For example, a search string of Ed returns the College of Education, Ed Nowak, and so on.

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.

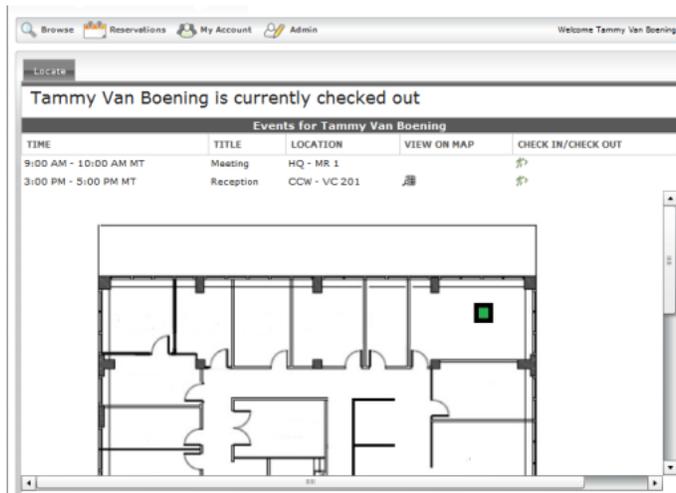
Bookings for a selected group



- 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.

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

Viewing the floor plan for an event’s building



- In EMS Workplace, if the group 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.

## CHAPTER 25: 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 your EMS administrator assigned to your account, you can reserve rooms and services with or without requiring approval.

Note: An Exchange/Lotus Notes integration option may 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 [Book a Room with the Plan A Meeting Module](#).

- 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.

## CHAPTER 26: Book a Room 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.

### Room Request Page

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.

### Submit a Request for Space (Book a Room)

1. Under Reservations, click a reservation option. The Room Request page opens.

Note: 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:

- 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.

Notes: 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.

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.

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

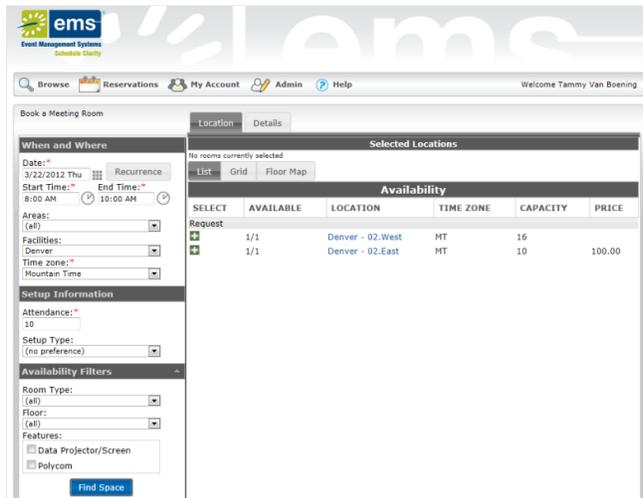
- If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.
3. In the Setup Information section, enter your attendance and setup type.
  4. The Availability Filters section provides options for filtering 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.

Notes: It may be possible to specify the default values for some of these options, including the default view (List or Grid) for the search results. See [Set 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 may 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 [Create a List of Favorite Rooms](#).

Room Request page, List view



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

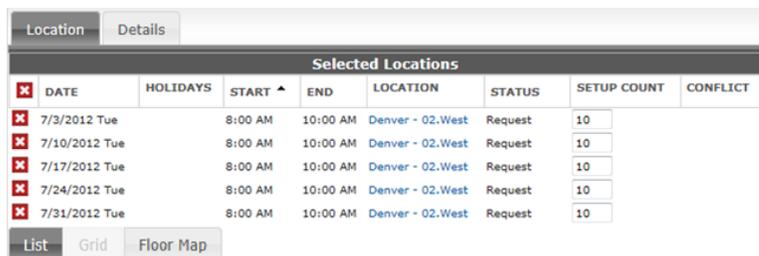
- Click the Add icon next to the room in either the list or grid view.
- Click the Available Room icon for the room in the Floor Map view, and then click Reserve in the Room Details message that opens.

Notes: 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.

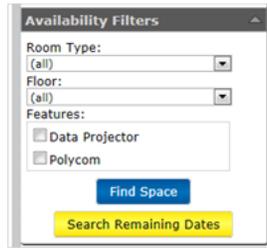
The following results are possible:

- 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.



- 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.

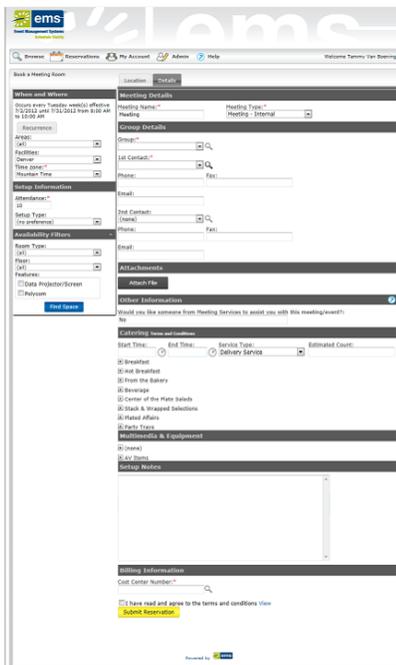


7. Optionally, do one or both of the following; otherwise, continue to Step 8.
  - Click the name of any room that you selected for the event to open the Location Details popup, and then open the Availability tab on this popup to view the room’s availability in either a Daily or Weekly view.
  - In the 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.

Note: 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.

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.

Tip: 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 [Reservation Summary Page](#).

Note: 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 may be automatically generated and sent to you.

## CHAPTER 27: Book 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.

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.

### Submit a Request for Space (Book a room with the PAM Module)

1. Under Reservations, click a reservation option. The Room Request page opens.

Note: Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure may or may not be present. In addition, certain labels might have been renamed in your

implementation of VEMS. For example, "group" may be labeled to "client," "employee," or "department"; "event" may be labeled "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:

Note: 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.

Tip: 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.

Tip: 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. 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.

Tip: An option might be available to specify default values for one or more of these options in any section in this pane. See Set Default Values for Room Requests.

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.

Tips: 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 Create a List of Favorite Rooms.

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.

Tip: 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.

Tip: 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.

Tip: 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.

## Room Request page, Grid view of search results

The screenshot displays the 'Book a Meeting Room' interface. On the left, there are sections for 'When and Where' (including date, start/end times, and time zone), 'Setup Information' (attendance, setup type, and a 'Find Space' button), and 'Availability Filters' (room type, floor, and features like Data Projector and Polycom). The main area is divided into 'Location' and 'Details' tabs. The 'Location' tab shows 'Selected Locations' with a grid of attendees (Ed Nowak, Mike Wimettt, Sean Nelson) and their room reservations for Wednesday, December 15, 2010. The 'Room' grid view shows two rooms: 02.West (capacity 16) and 02.East (capacity 10), both reserved for 'EMS Workplace Training' and 'EMS 6.0'.

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.

Tip: 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.

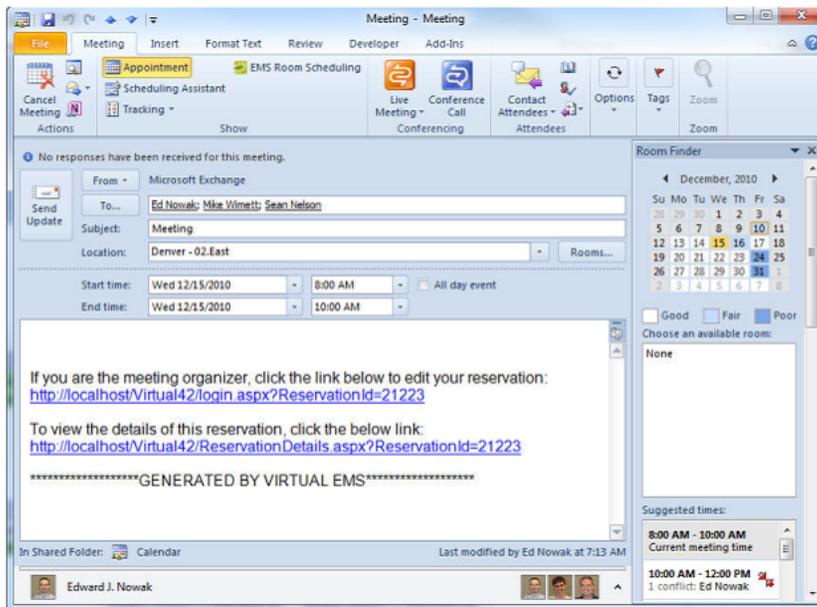
The screenshot displays the 'Book a Meeting Room' interface in the EMS system. The page is titled 'Book a Meeting Room' and has tabs for 'Location' and 'Details'. The 'Details' tab is active, showing various input fields for meeting information. Required fields are marked with a red asterisk (\*). The form is organized into several sections: 'When and Where' (date, start/end times, time zone, areas, facilities), 'Meeting Details' (meeting name, meeting type), 'Calendaring Details' (subject, show time as, reminder, message), 'Setup Information' (attendance, setup type, 'Find Space' button), 'Employee Details' (employee name, contact information, search icons), and 'Billing Information' (cost center number). The user is logged in as 'Ed Nowak'.

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 may 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 may have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.
- You may 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 may 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.
- 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.
- Important: 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. For a reservation containing multiple bookings (a recurring meeting), resolve any room conflicts using the booking tools outlined on the Reservation Summary page. See Reservation Summary Page.

#### Automatically Generated Email



## CHAPTER 28: Book 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.

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.

### Submit a Request for Space (Online Request for a Room)

1. Under Reservations, click a reservation option. The Room Request page opens.

Note: Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure may or may not be present. In addition, certain labels may have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department,” event may 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:

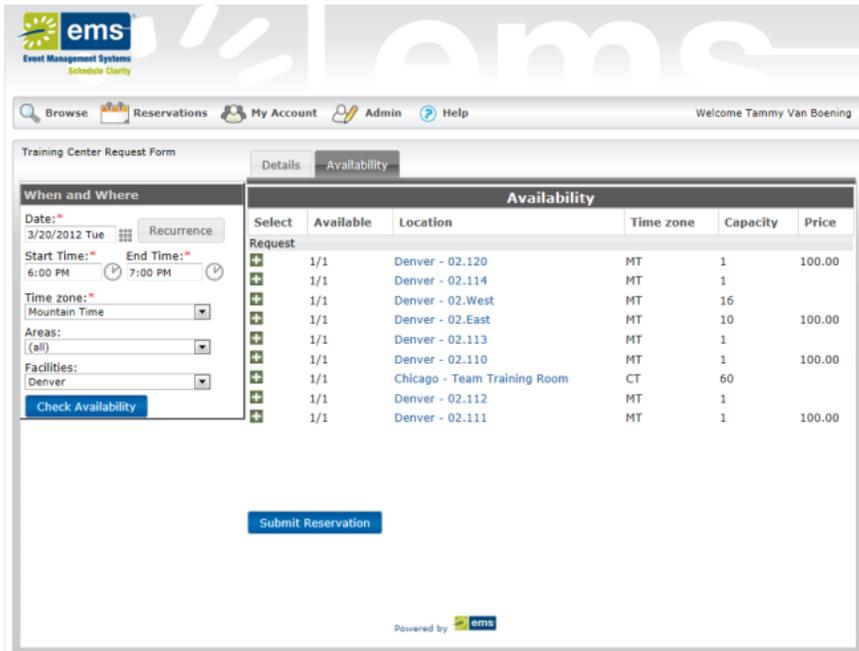
Tip: Depending on how your EMS administrator has configured your organization's Room Request template, you might see different fields, or you might not see some of these fields displayed at all.

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

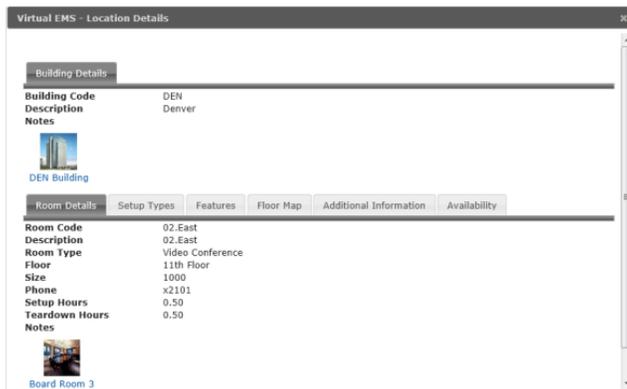
Tips: Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.

- 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.

Request Room Form page, Availability tab



- 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.



- Open the 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 [Reservation Summary Page](#).

## CHAPTER 29: Request Services Only

When you request services only for a location that is not managed in EMS, 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.

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.

1. Under Reservations, click a reservation option. The Services Only Request page opens.

Tip: 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 [Set 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.

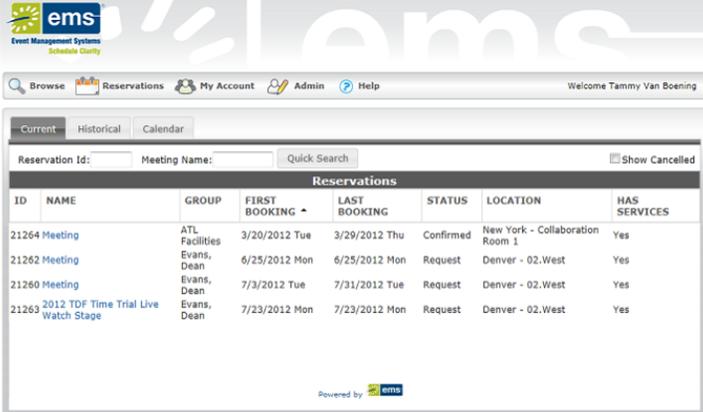
The screenshot shows the EMS 'Services Only Request' form. The 'When and Where' section includes Date (12/12/2012), Recurrence, Start Time (8:00 AM), and End Time (10:00 AM). The 'Meeting Details' section has Meeting Name and Meeting Type. The 'Group Details' section includes Group (Evans, Dean), 1st Contact (Montoya, Julie), 2nd Contact, Phone, Fax, and Email. The 'Location Details' section has Building (Chicago) and Location (The Room). The 'Attachments' section has an 'Attach File' button. The 'Catering Terms and Conditions' section includes Start Time, End Time, Service Type (Delivery Service), Estimated Count, and checkboxes for breakfast, hot breakfast, beverages, center of the state salads, stack & wrapped selections, plated affairs, party trays, and miscellaneous & equipment. The 'Billing Information' section has Cost Center Number (22.2222) and Department Code. A 'Submit Reservation' button is at the bottom.

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 may 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 may 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 may 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 may 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 [Reservation Summary Page](#).

## CHAPTER 30: View 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.



The screenshot shows the VEMS Reservations page. At the top, there is a navigation bar with 'Browse', 'Reservations', 'My Account', 'Admin', and 'Help'. Below this is a search bar with 'Reservation ID:' and 'Meeting Name:' fields, and a 'Quick Search' button. The main content area is titled 'Reservations' and contains a table with the following data:

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 IDF 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:

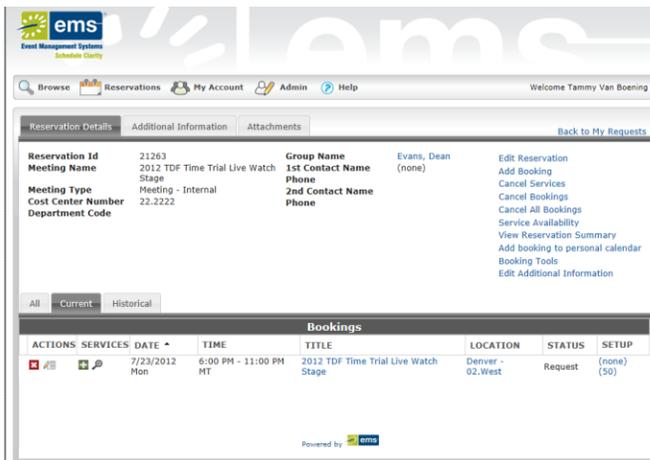
- To view the list of requests in a Calendar view, open the Calendar tab.
- To search for a reservation, enter a reservation ID in the Reservation ID field and/or a search string in the Event Name field, and then click Quick Search.

Tip: 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 Education Seminar, Ed Smith fundraiser, Health Center Education 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 [Reservation Summary Page](#).

## CHAPTER 31: 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 any requested services. This area enables you to modify bookings within a reservation, such as requesting services and adding attendees.

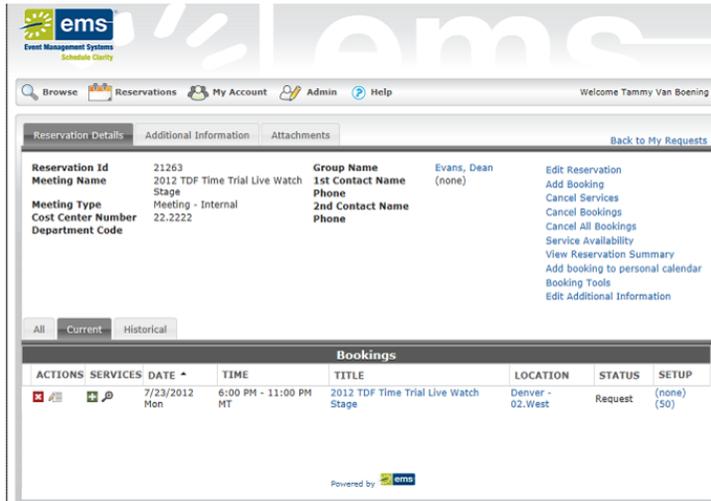


In addition to the Reservation Details tab, the Reservation Summary page may have up to two additional tabs in the top pane of the page—the Additional Information tab and the Attachments tab. The Reservation Summary page also has three tabs in the bottom pane—All, Current, and Historical of the page.

For an overview of each section here, see:

- [Reservation Details Tab](#)
- [Additional Information Tab](#)
- [Attachments Tab](#)
- [Current Tab](#)

## Reservation Details Tab

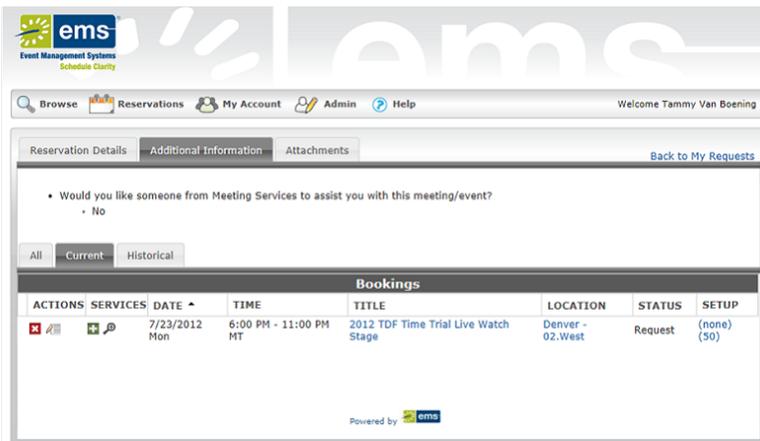


The Reservation Details tab displays detailed summary information (the Reservation ID, the Event Name, the Event Type, and so on) for the selected reservation and all its bookings as well any services that were requested for the bookings. The following links are displayed on the Reservation Details tab. 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 <a href="#">Book a Room in VEMS</a> .
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 <a href="#">Current Tab</a> .
Cancel Bookings	Cancel selected bookings for the reservation. Note: You can also cancel selected bookings on the Current tab. See <a href="#">Current Tab</a> .

LINK	DESCRIPTION
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.
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.

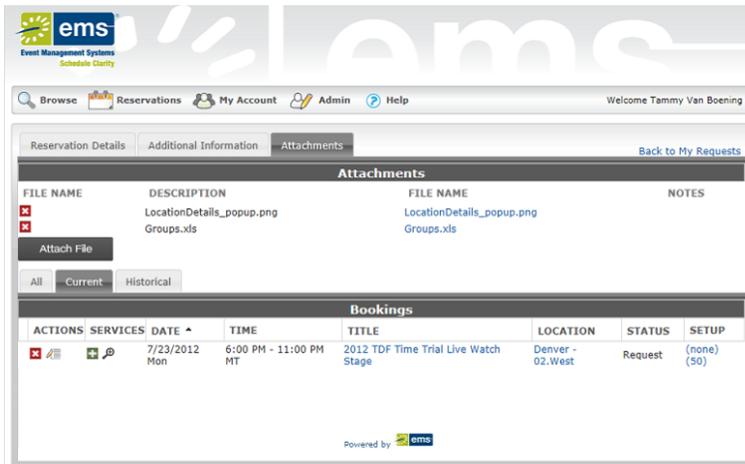
## Additional Information Tab



The Additional Information tab is displayed only if the reservation type required additional information about the reservation.

Tip: 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



The Attachments tab is displayed if the reservation type required attachments. This tab displays the attachment description, the attachment file name, and any notes that were entered for the attachment. You can:

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

## 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.

The screenshot shows a web interface for managing bookings. At the top, there are tabs for 'All', 'Current', and 'Historical'. Below the tabs is a table titled 'Bookings'. The table has columns for ACTIONS, SERVICES, DATE, TIME, TITLE, LOCATION, STATUS, and SETUP. There are five rows of data, all for 'Meeting' events at 'Denver - 02.West' on Tuesdays in July 2012. Each row has icons for canceling, editing, and adding services. At the bottom of the table, it says 'Powered by ems'.

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)

You can:

- Cancel a booking, click the Cancel Booking icon next to it.
- Edit a booking, click the Edit Booking icon next to it. See [Edit a Booking](#).
- 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 [Add Services for a Booking](#).
- 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 [Edit and/or Cancel Services for a Booking](#).
- View services for a booking, click the View Services icon next to it.

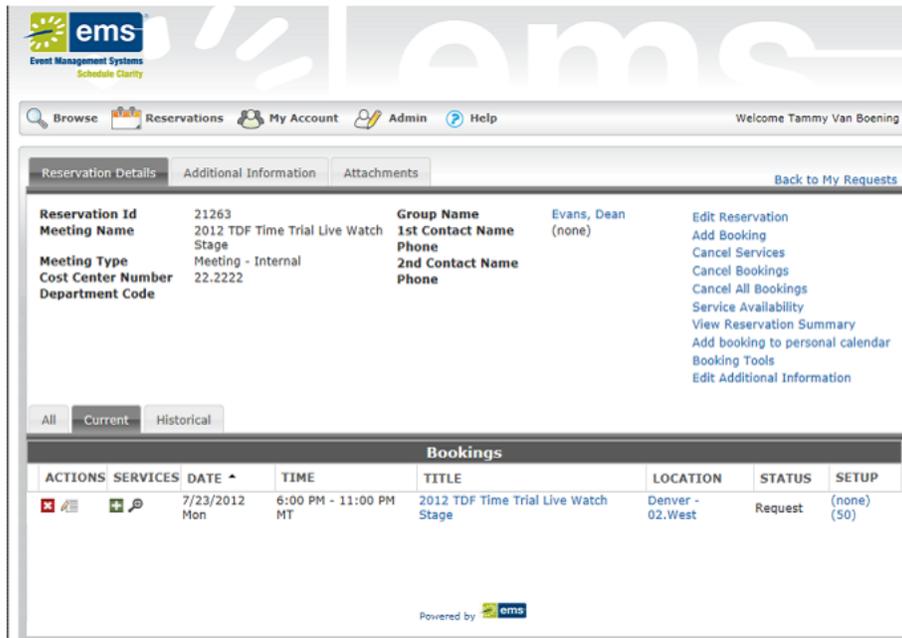
## CHAPTER 32: Modify Bookings

This section guides you in working with bookings in the Reservation Details page on Virtual EMS, where you can add, change, or cancel services and attendees for a booking. A Reservation may contain multiple bookings, and the procedures below also guide you in efficiently applying your changes to more than one booking within a Reservation.

This topic will provide information on the following:

- [Edit a Booking](#)
- [Add Services for a Booking](#)
- [Add Attendees to a Booking](#)
- [Edit and/or Cancel Services for a Booking](#)

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 as any requested services for those bookings.

### Edit a Booking

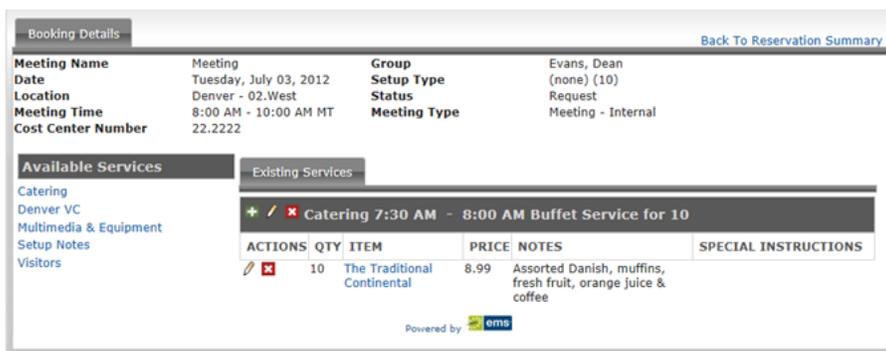
1. Click the Edit Booking icon next to the booking you want to edit. A Request page opens.

Note: 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.

2. Edit the information for the booking as needed. Required fields are marked with a red asterisk (\*).
3. At the bottom of the Request page, click Update Booking. A message opens indicating that the booking was successfully updated.
4. Click OK. The message closes. You return to the Reservation Summary page with the new or modified information for the booking displayed.

## Add Services for a Booking

1. Click the Add/Edit Services icon next to a booking. The Booking Details tab opens. This tab summarizes information for the booking (event name, event date, location, and so on), plus services you can add to the booking (Available Services tab) and any services already added (Existing Services tab).



2. On the Available Services tab, click the type of service you want to add. The Available Services tab refreshes to present options based on the service you choose. You can add resources with service orders, catering (food) services, resources without service orders, setup notes and/or a room charge.
3. Enter the necessary information for the services you are adding to the booking.
4. At the bottom of the page, click Save.

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

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

- If the reservation has only this single booking, a confirmation message displays. Click OK to close the message and return to the Booking Details tab. The newly added booking detail shows on the Existing Services tab.
- If the reservation has multiple bookings, then choose whether to add services to just the one booking, or several:

- To add the services to only this booking, click Do Not Apply to Additional Bookings. You remain on the Booking Details tab. The newly added services show on the Existing Services tab.
- To add the services to one or more of the other bookings in the reservation, select them (you can select all using the checkbox in the Date column heading), and then click Save. A confirmation message displays. Click OK to close and return to the Booking Details tab. The newly added services now show on the Existing Services tab.

Tip: Any resource conflicts are marked with a Warning icon and highlighted in red.

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)

## Add Attendees to a Booking

1. From the Booking Details tab, you can also add multiple attendees or visitors to a booking. For each attendee/visitor you add, enter the necessary information and click Save to return to the Attendees/Visitor page. Required fields are marked with a red asterisk (\*).
2. After you finish adding attendees or visitors, do one of the following:
  - If the reservation has only this single booking, then click Back to Reservation Summary page.
  - If the reservation has multiple bookings, then choose whether to add attendees to just the one booking, or several:
    - To add attendees to just this selected booking, click Back to Reservation Summary page.
    - To add attendees to one or more of the other bookings in the reservation, click Add to Additional Bookings. To return to the Booking Details tab. Select the appropriate bookings (to select all, use the checkbox in the Date column heading), and then click Save to return to the Booking Details tab. The newly added attendees show on the Existing Services tab.

## Edit and/or Cancel Services for a Booking

1. Click the Add/Edit Services icon next to a booking. The Booking Details tab opens. This tab summarizes information for the booking (event name, event date, location, and so on), plus the available services you can add to the booking (Available Services tab) and services that have already been added to the booking (Existing Services tab).

The screenshot displays the 'Booking Details' window. At the top right, there is a link 'Back To Reservation Summary'. The main content is divided into two sections: 'Available Services' on the left and 'Existing Services' on the right.

**Available Services:**

- Catering
- Denver VC
- Multimedia & Equipment
- Setup Notes
- Visitors

**Existing Services:**

**Catering 7:30 AM - 8:00 AM Buffet Service for 10**

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

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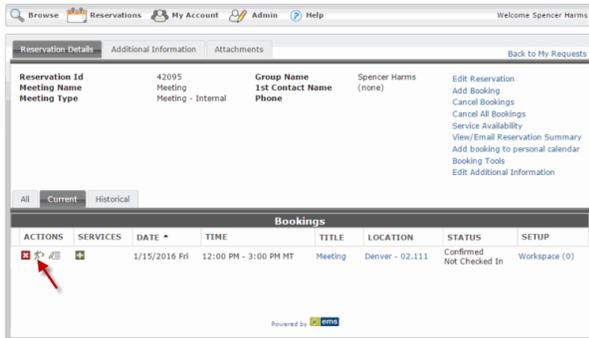
You have the following options for editing and/or canceling (deleting) the services for a booking:

- 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.

## CHAPTER 33: Booking Level Check-In with VEMS

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

Once your System Administrator has enabled the Booking Level Check-In Role, you can check into bookings on the Reservation Summary by clicking the green check-in icon under the Booking Actions.



Note: In Version 44, the Building level Check-in/Check-out has been removed along with the ability to check a group in via the Locate Group web menu and the Check In/Check Out web menu.

## CHAPTER 34: My Account 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.

- [Create or Modify a User Account](#)
- [Create Delegate Accounts](#)
- [Set Default Values for Room Requests](#)
- [Create a List of Favorite Rooms](#)

## CHAPTER 35: Create or Modify 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.

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

- [Create a User Account](#)
- [Modify a User Account](#)

### Create a User Account

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

The screenshot shows the 'Create An Account' page in the VEMS system. The page has a header with the 'ems' logo and the tagline 'Event Management Systems Schedule Clarity'. Below the header is a navigation bar with 'My Account' and 'Welcome Guest'. The main content area is titled 'User Info' and contains several form fields: 'Email:\*', 'Name:\*', 'Phone:', 'Fax:', 'Time zone:\* (no preference)' (a dropdown menu), 'Password:\*', 'Confirm Password:\*', and 'Notes:'. There is a checkbox labeled 'I do NOT want to receive automatic emails'. Below the checkbox is a 'Zendesk' logo and a 'Type the code shown:' field with a text input box. A link 'Show another code' is located below the code field. At the bottom of the form is a 'Save' button. The page footer indicates it is '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.

## Modify a 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.

1. Under My Account, click Edit My Account. The User Account page opens. The User Info tab is the active tab.

The screenshot shows the VEMS user account management interface. At the top, there is a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin' options. The 'My Account' section is active, displaying a 'User Info' tab. The form contains the following fields:

- Email: info@spectrumwritingllc.com
- Name: Tammy Van Boening
- Phone: 303-840-1755
- Fax: (empty)
- Time zone: Mountain Time (dropdown menu)
- Password: (empty)
- Confirm Password: (empty)
- Notes: (empty)
- I do NOT want to receive automatic emails

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

2. Do any of the following:

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

Tips: 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.

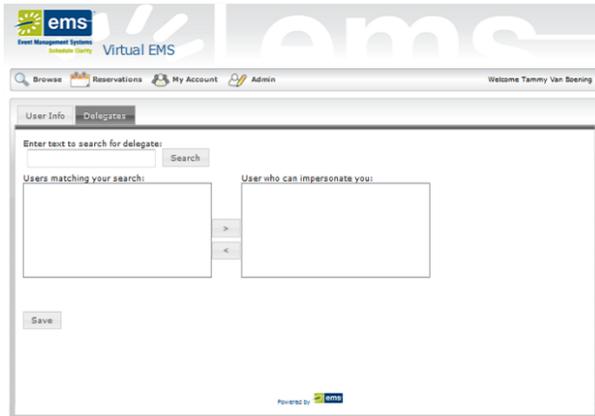
Options might also be present to opt out of receiving automatic emails that are received from VEMS such as reminders or the reservation summary that is emailed when you submit your reservation and/or view and modify miscellaneous notes for the account.

3. Click Save.

## CHAPTER 36: Create 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.

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.



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.

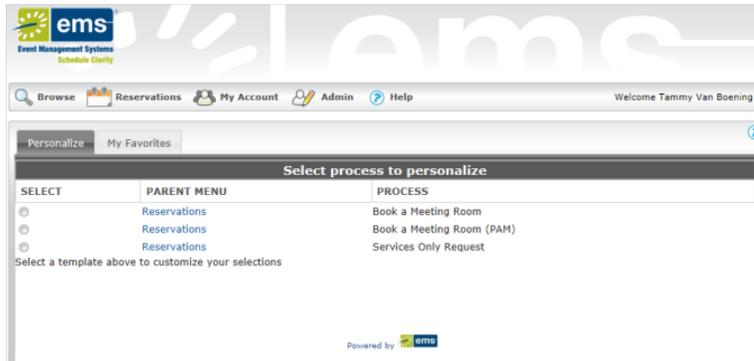
Tip: Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of "ed" returns Ed Smith, Ted Wilson, and so on.

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.

## CHAPTER 37: Set 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.

1. Under My Account, click User Options. The User Personalization page opens. The Personalize tab is the active 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.

User Personalization page, Personalization Options section

ems  
Event Management Systems  
Schedule Clarity

Browse Reservations My Account Admin Help Welcome Tammy Van Boening

Personalize My Favorites

Select process to personalize

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

Central Time:

Areas:

Facilities:

Setup Type:

Room Type:

Floor:

Save Preferences

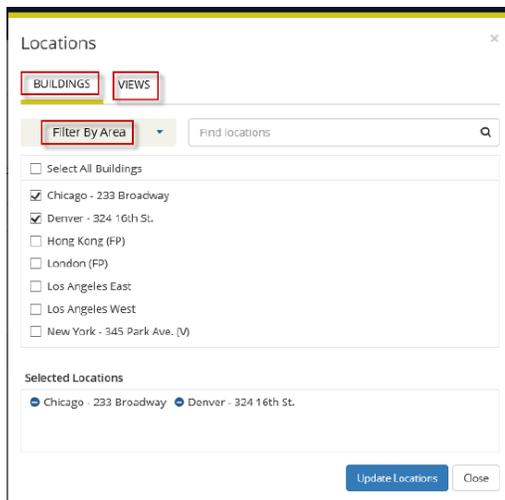
Powered by ems

- 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.

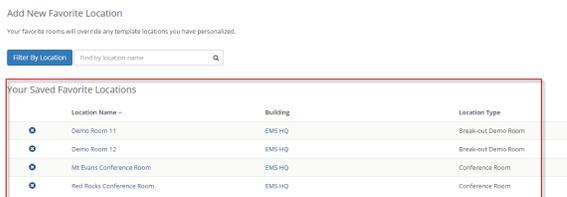
## CHAPTER 38: Create a List of Favorite Rooms

Users can create a list of favorite rooms that can be searched for availability when creating a room request. This list of favorites is created in the My Account section of VEMS. Once created, the list of favorites will be displayed in the Facilities dropdown list on the Room Request page in EMS for Microsoft Outlook and VEMS. 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.

1. Open VEMS. In the upper right-hand corner, click My Account.
2. Click the My Favorite Rooms tab.
3. Under the Add New Favorite Room section, you can filter by location or find room by name.
  - a. To search for a room by Area, Building, or View, click Filter by Location. The Locations dialog box appears.
    - Check the box(es) of the location you want to add to your favorites. Click Update Locations. The selected rooms will appear in the Selected Locations section at the bottom of the dialog box.



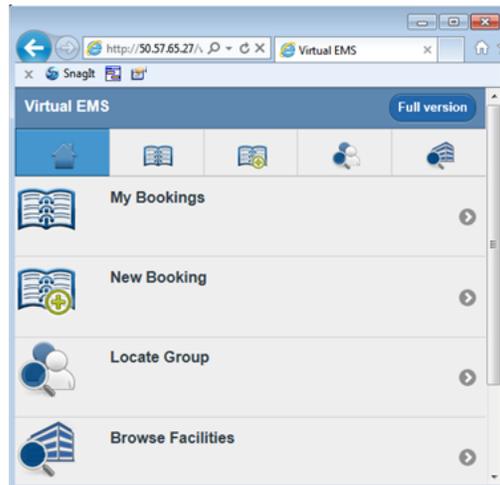
- b. You can search for a room by name by typing the name in the Find by room name field and clicking the search icon.
4. Your list of favorite rooms will appear as a list under the Your Saved Favorite Rooms section. The list can be sorted by Room Name, Building, or Room Type by clicking the sort button next to the filter.



5. Delete a Favorite Room by clicking the Delete icon to the left of the Location Name.

## CHAPTER 39: Mobile Version of VEMS

VEMS is available both in an EMS 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. If you access VEMS from a mobile device, you are redirected to the VEMS mobile version.



### 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.

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