EMS for Outlook

Installation, Configuration, and User Guides

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Introduction

EMS for Outlook is an optional add-in that integrates EMS' room reservation process directly with Microsoft Outlook 2007/2010/2013. Users can view room availability in addition to attendee free/busy information simultaneously and book/manage their meetings directly within Outlook. This document lists the steps you must take to install and configure EMS for Outlook.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). Please contact Customer Support (or a member of the Client Services group if you are working with one) if you have any questions or encounter any issues.

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

EMS for Outlook Requirements

- **User Desktop Requirements for Microsoft Outlook 2007 (Windows XP, Windows 7 and Windows 8/8.1)**
  - .**NET Framework 3.5** (Click the link to go to the Microsoft Download Center)
  - **2007 Microsoft Office System Primary Interop Assemblies (PIA)**
  - **Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010)**
  - ****Microsoft Office 2007 Hotfix (KB976477) or MS10-036 security update for Office 2007 (KB982312)**

    Note: These two Hotfixes have been rolled-up into **2007 Microsoft Office Suite Service Pack 3 (SP3)**

- **User Desktop Requirements for Microsoft Outlook 2010/2013 (Windows XP, Windows 7 and Windows 8/8.1)**
  - .**NET Framework 3.5** (Click the link to go to the Microsoft Download Center)
  - **Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) (Windows XP Only)**

    Note: 64-bit editions of Microsoft Office 2010 and 2013 require additional installation steps not outlined in this document. Please contact Customer Support for more information.

- **Microsoft Exchange 2007/2010/2013**
  Microsoft Exchange 2007 SP1, Microsoft Exchange 2010, or Microsoft Exchange 2013 is required.

- **Plan-a-Meeting (PAM) Module Installed**
  The PAM Web Service must be installed and operational. Please see the *Plan-a-Meeting (PAM) Installation Instructions for Microsoft Exchange Integration* for information on how to install and configure this component.

- **Valid EMS for Outlook Licensing**
  You must be licensed for EMS, Virtual EMS, EMS for Outlook, and Plan-a-Meeting in order to configure and use this module. If you are unsure whether or not your organization is appropriately licensed, please contact your Account Executive.

- **EMS/Virtual EMS Installed**
  EMS and Virtual EMS must be installed and operational.

EMS for Outlook Technical Overview

EMS for Outlook is comprised of two main components – The PAM Web Service and the EMS for Outlook Add-in.

- **PAM Web Service** - This web service (typically installed where your Virtual EMS site resides) manages all communication/transactions between the EMS for Outlook Add-in (as well as the EMS client and Virtual EMS) and the EMS database including checking room availability, booking the meeting in EMS, and managing changes.
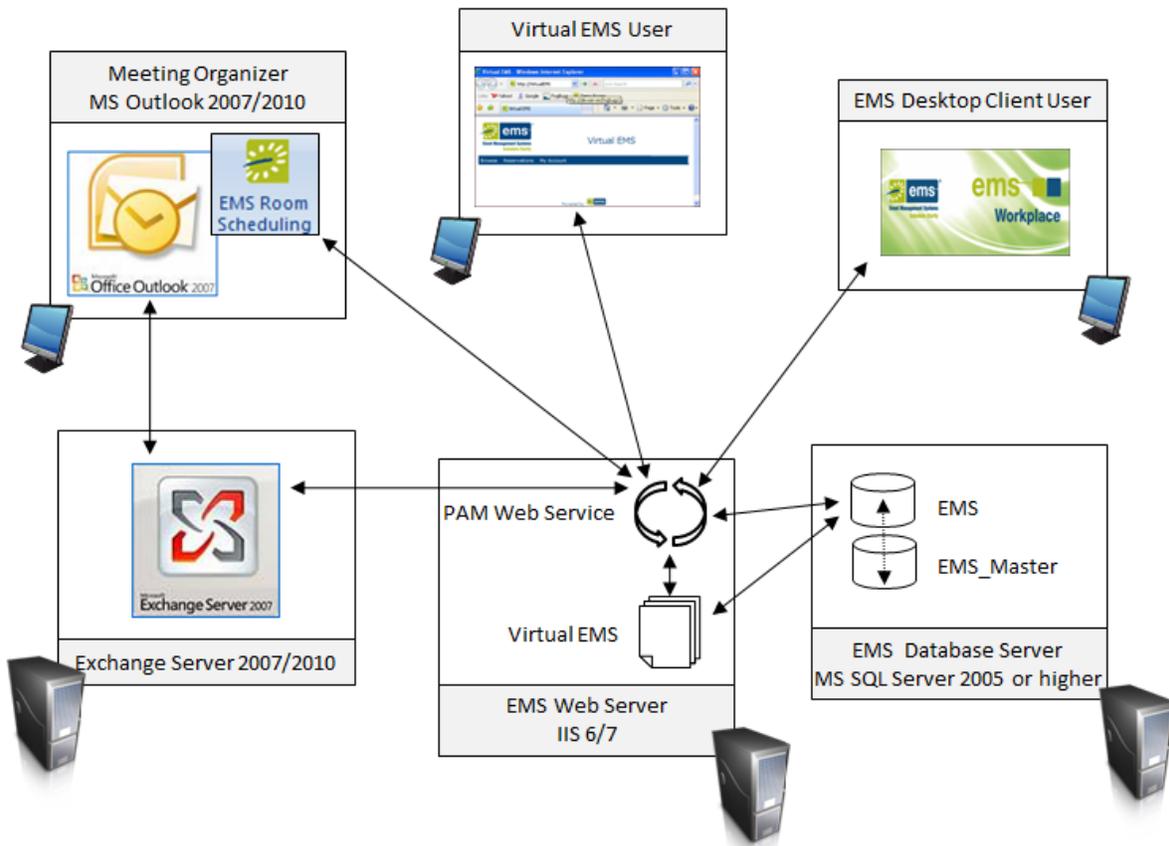
EMSForOutlook.msi will prompt the user for the PAM Web Service Address during the installation process. Once entered, a new key is created in the user's Windows Registry.

- **EMS for Outlook Add-in** (**EMSForOutlook.msi**) – COM Add-in installed on your users' desktops. This file exposes the EMS Room Scheduling option on the Outlook Calendar Appointment form.
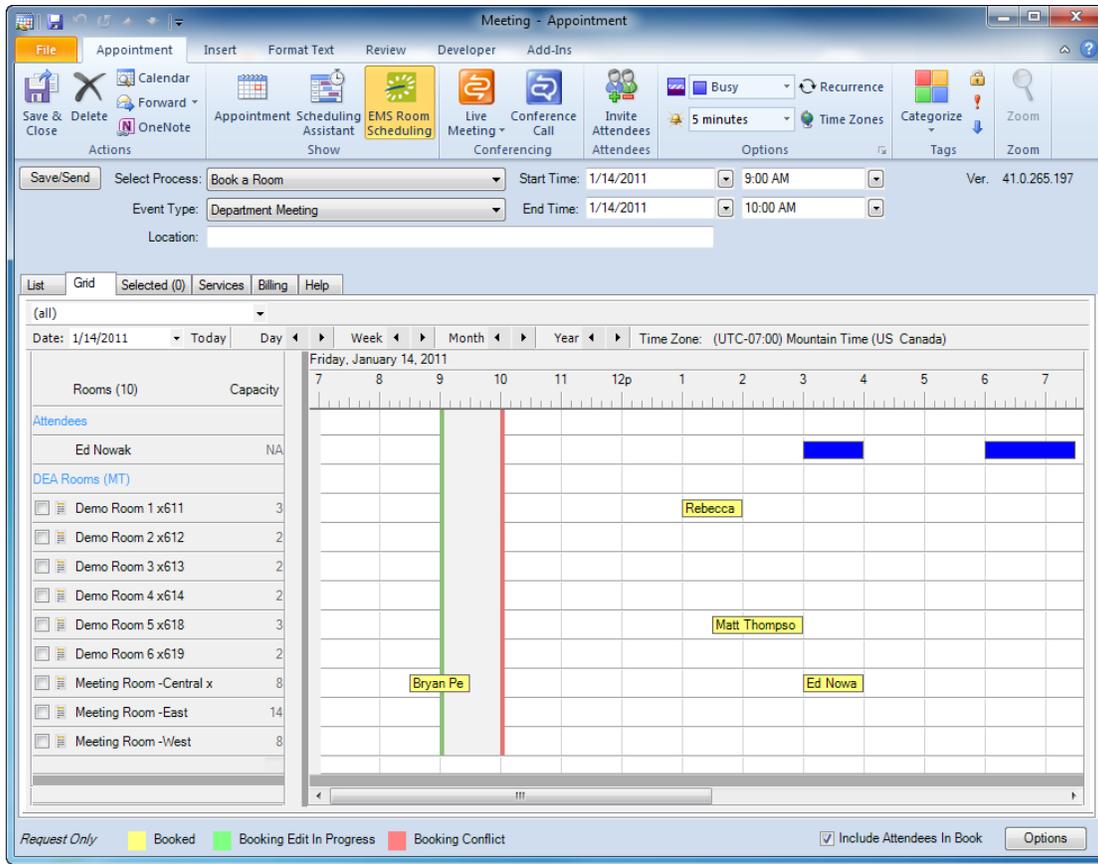
By default, the **EMSForOutlook.msi** installs all of the files required by the EMS for Outlook Add-in within the following locations:

32-bit machines - *C:\Program Files\EMS for Outlook*

64-bit machines *- C:\Program Files (x86)\EMS for Outlook*
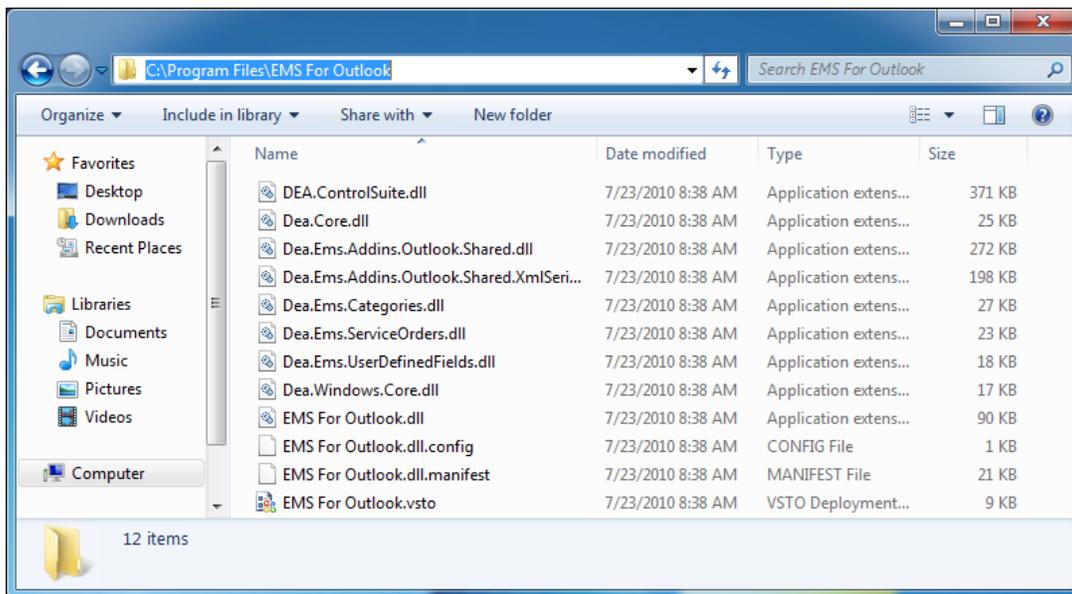
This location can be changed during the installation, but it is recommended that you keep the default.

EMS must also be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user.

- The Outlook user must have an active EMS Web User account.
- The EMS Web User account must be assigned to at least one Web Process Template with the **Outlook** option enabled.
- The EMS Web User account must be associated to an active EMS Group record.

    Note: "Group" may have been relabeled to "Client" or "Employee" in your EMS system.

EMS configuration instructions can be found in the Additional Information section of this document.

Obtaining the EMS for Outlook Installation File

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

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

Pre-Installation Requirements

1. The PAM Web Service must be installed and operational. Please see the *Plan-a-Meeting (PAM) Installation Instructions for Microsoft Exchange Integration* for information on how to install and configure this component. You can quickly verify if the PAM Web Service has been installed by opening a browser and entering the following:

    http://[ServerName]/PAMWebService/Service.asmx (replace [ServerName] with the name of your web server)

    The PAM Web Service Address will be required when running the **EMSForOutlook.msi** (outlined in the next section.)

2. EMS must be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user. Please see the Additional Information section.
3. Verify that the necessary prerequisite software is installed on your users' workstations.

Installing/Upgrading EMS for Outlook on a User's PC

Note: 64-bit editions of Microsoft Office 2010 and 2013 require additional installation steps not outlined in this document. Please contact Customer Support for more information.

1. Verify that the pre-installation requirements have been met.
2. Download the **EMSForOutlook.msi** file onto the user's desktop.
3. Close Outlook.
4. Run **EMSForOutlook.msi**.
5. The first screen welcomes you to the EMS Outlook Add-in Setup Wizard. Click the **Next** button to begin the installation process. The *Destination Folder* screen will appear.
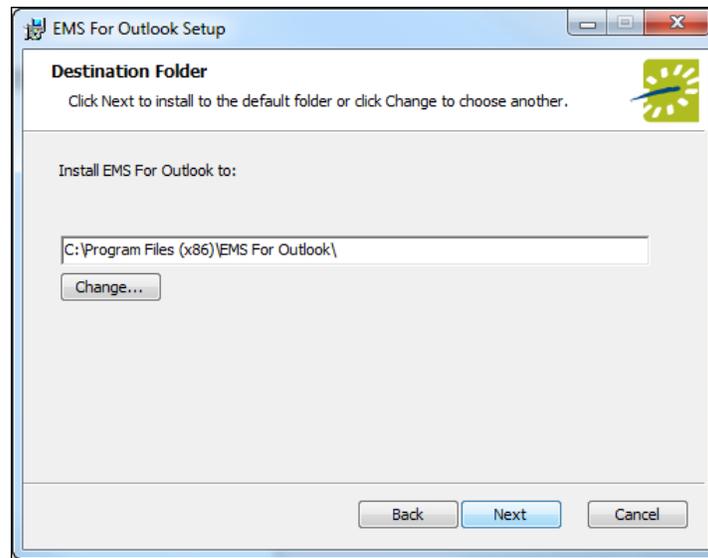
6. Specify the installation Folder. **Note** - It is recommended that you keep the default setting.
7. Click the **Next** button. The *PAM Web Service Information* screen will appear.
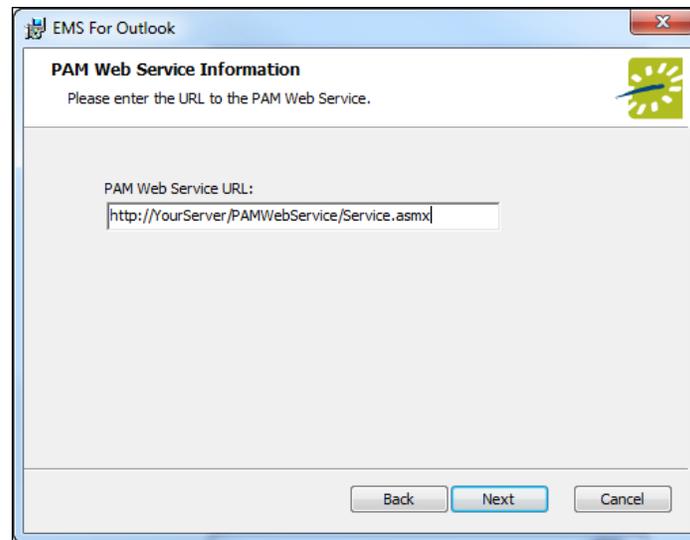
8. Input the PAM Web Service Address. (Example - http://[ServerName]/PAMWebService/Service.asmx)
9. Click the **Next** button. The *Ready to install EMS for Outlook* screen will appear.
10. Click the **Install** button to complete the installation. Click the **Close** button to exit.
11. Launch Outlook. The **EMS Room Scheduling** button should display on the user's Calendar Appointment form.

Additional Information

EMS for Outlook Customization Options

To change the "*EMS Room Scheduling*" label:
1. Log into EMS.
2. Navigate to *System Administration > Settings > Parameters* and select the *Virtual* tab.
3. In the Area drop-down, select *EMS for Outlook.*
4. Select *Text to display under icon in EMS for Outlook* and click **Edit**.
5. Save your changes and click **OK**. Click **Close**.

Default icon and label

To change the EMS for Outlook icon:
- Secure your new icon file. The icon must be of file type BMP, GIF, JPG, or PNG. The new icon should have a resolution of 32 x 32 pixels.
- Ensure the new logo file is named CustomLogo.bmp (or other extension listed above).
- Drop the new custom icon into the EMS for Outlook installation directory (*e.g. C:\Program Files (x86)\EMS for Outlook*. This step must be performed *after* the EMS for Outlook plugin has been installed on the workstation.

Note: Microsoft Outlook needs to be restarted for either of these changes to take effect.

EMS Configuration

EMS must be configured properly in order to activate the EMS for Outlook Add-in for a particular Outlook user. An Outlook user's EMS Web User account is used by the EMS for Outlook Add-in to establish their room booking privileges (via which Web Process Template(s) they're assigned to) in addition to deriving which EMS Group(s) the appointment can be booked on behalf of.

The following must exist in your EMS database in order to activate EMS for Outlook for a specific user:

- An active EMS Web User account must exist.
- The EMS Web User account must be assigned to at least one Web Process Template with the **Outlook** option enabled.
- The EMS Web User account must be linked to an active EMS Group record (via the **External Reference** field; see *Linking and EMS Web User Account to a Group Record* below) or, at a minimum, be able to book on behalf of at least one Group record (see *Assigning Group Record(s) to a Web User Account* below.)

Defining an Outlook Web Process Template

Please see the *EMS Setup Guide* for instructions on how to create a Web Process Template.

When defining a Web Process Template, simply select the **Outlook** option. The *Outlook Conflict – Email Options* tab allows you to specify your messaging for the email received by the Outlook user if a conflict is encountered during the booking process.
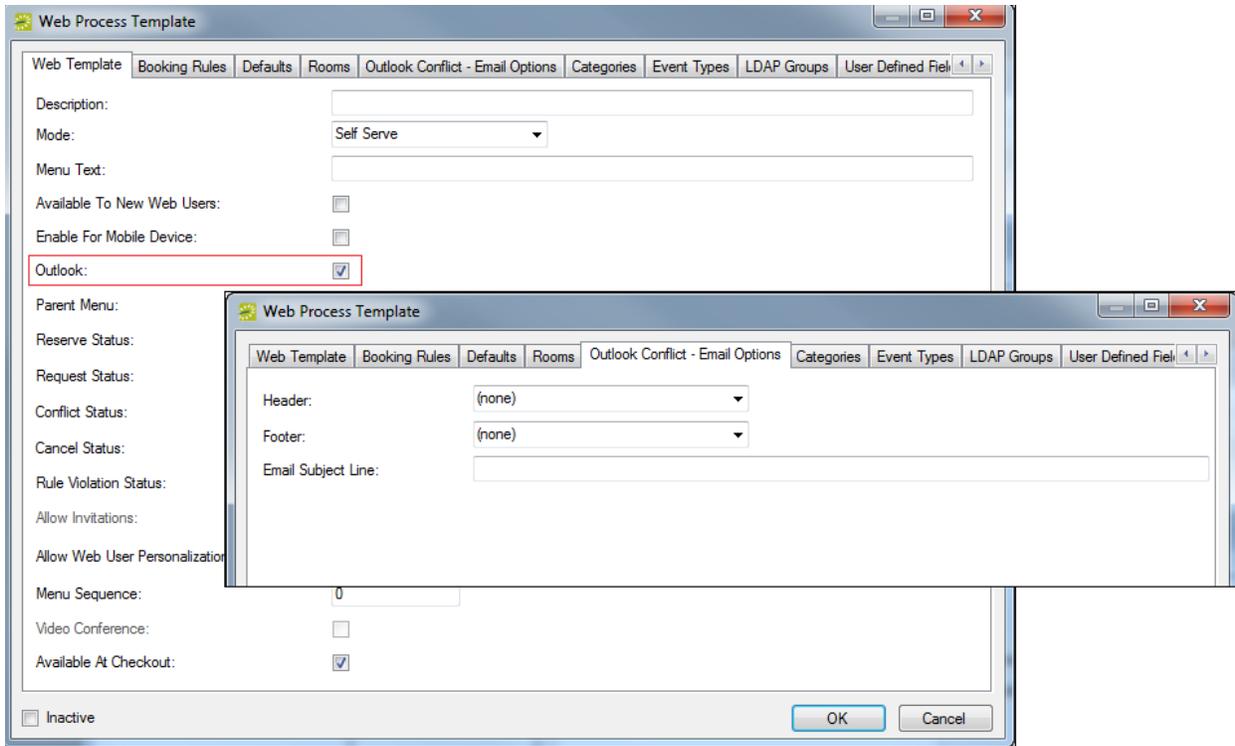
Complete the remaining tabs as documented in the *EMS Setup Guide.* Once you have defined your Outlook Web Process Template(s), assign it to your Web User(s).

Linking an EMS Web User Account to a Group Record (Typical)

An EMS Web User account is matched to a Group record via the **External Reference** field. This can be verified for a specific user by comparing the **External Reference** field on their Group record (located on the *Billing Information* tab within *Reservations > Reservations > Groups*) and Web User account (located on the *Web User* tab within *Configuration > Web > Web Users*).
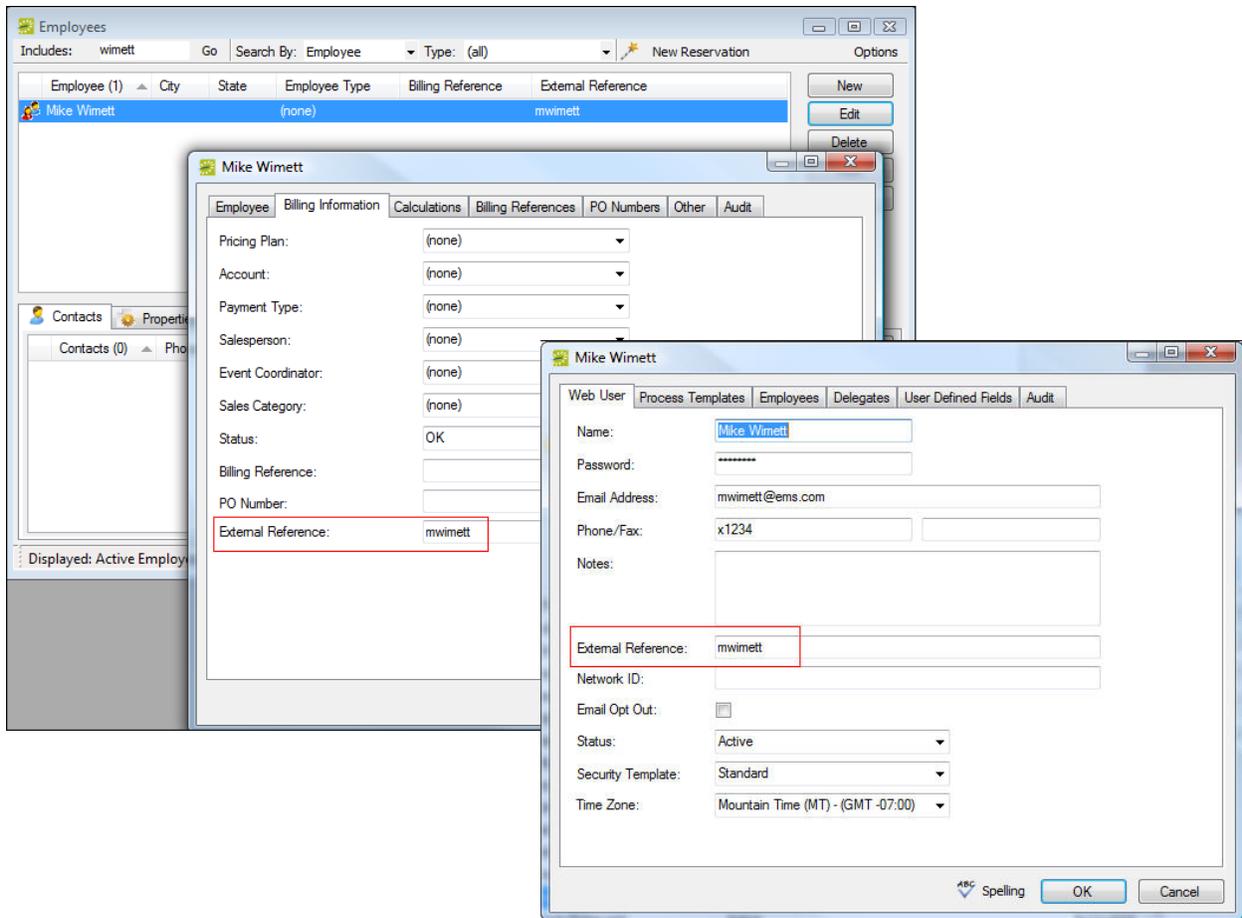
These values can be set automatically if your organization is using the HR Toolkit module. Please see the *HR Toolkit Installation Instructions* for more information.

Assigning Group Record(s) to a Web User Account

A Group record is assigned to a Web User account within *Configuration > Web > Web Users.*
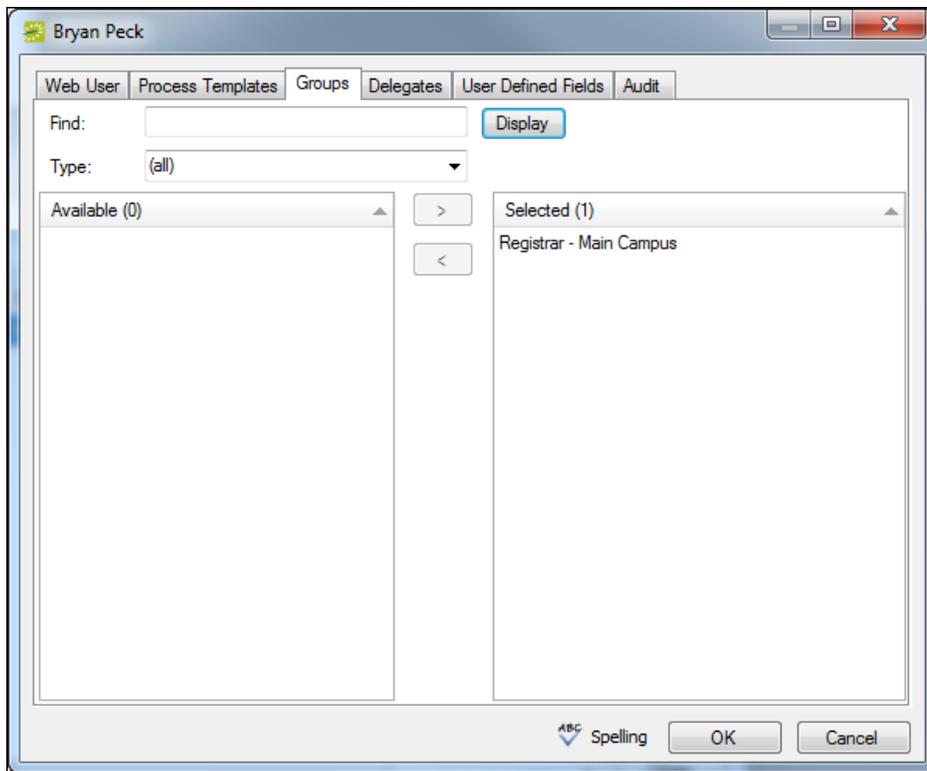
Silent/Unattended Installation

Command for unattended /silent installation of the **EMSForOutlook.msi** (replace [ServerName] with the name of your web server):

msiexec /I EMSForOutlook.msi /quiet WSURL="http://[ServerName]/PAMWebService/Service.asmx"

EMS for Outlook Overview

The EMS for Outlook plugin module provides one-click access to self-service room reservation and resource booking from within the familiar Outlook personal scheduling interface. Users can find available rooms, reserve them and book resources - such as A/V equipment or catering - all from within Microsoft Outlook.

This chapter covers the following topics:

- "Microsoft Outlook, EMS for Outlook, and VEMS Comparison"
- "Microsoft Outlook and Exchange Imposed Limitations for the EMS for Outlook Plugin Module"

Microsoft Outlook, EMS for Outlook, and VEMS Comparison

Figure 1-1: EMS for Outlook Plugin Module (displayed in Microsoft Outlook)
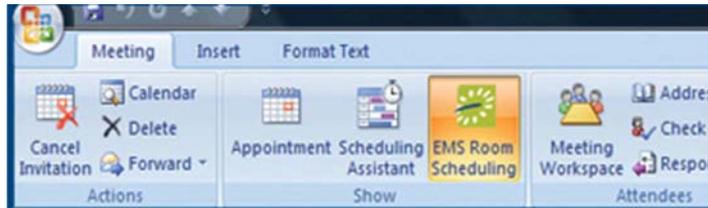
The EMS for Outlook plugin module provides one-click access to self-service room reservation and resource booking using the familiar Outlook personal scheduling interface. Users can find available rooms, reserve them and book resources - such as A/V equipment or catering - all from within Microsoft Outlook.

Virtual EMS(VEMS) provides robust, real-time access to scheduling information via an internet browser. A broad range of scheduling options and scheduling scenarios are supported easily. Authorized users can, depending on the level of access granted, submit room requests or create self-service reservations directly. Users can create basic or advanced reservations, schedule resources, view building schedules, or search for specific events.

Some important points to note about the EMS for Outlook plugin module as compared to Microsoft Outlook and VEMS are the following:

- The module is designed for the basic scheduling of rooms and resources that require no official approval ("unmanaged" space).

- The module is not designed to be an administrative tool. For complex room reservations and resource management, Virtual EMS (VEMS) or the EMS Desktop client application is required.

- Simple routine reservations made using the EMS for Outlook plugin module generally follow the same rules as simple Outlook reservations.

- The module supports existing Outlook delegation rules and assignments.

- The module can be used just like Microsoft Outlook to schedule regular recurring appointments (day and time).

- Just like VEMS reservations, EMS for Outlook reservations abide by the rules of the Web Process template and the VEMS settings of the applicable categories and resources. The ability to modify and cancel EMS for Outlook reservations (dates, time, rooms, services and/or resources) are determined by these rules *and* the restrictions of Microsoft Outlook and Exchange.

Figure 1-2 summarizes these comparisons.

Figure 1-2:   Microsoft Outlook, VEMS, and EMS for Outlook plugin module comparison

	Microsoft Outlook (Basic Functionality)	Virtual EMS	EMS for Outlook Plug-in Module
Suitable for self-service meeting requests	✓	✓	✓
Make real-time space reservations	✓	✓	✓
Easy access to view space availability	✓	✓	✓
Make basic recurring space reservations	✓	✓	✓
Real-time view of room and attendee availability	✓	✓*	✓
Add basic services and catering to meeting	No	✓	✓
Capture billing information	No	✓	✓
Capture cancellation reasons	No	✓	No
Suitable for heavily managed space	No	✓	No
Make random-date recurring reservations	No	✓	No
Make service only requests	No	✓	No
Make complex service and catering request	No	✓	No

*: Requires EMS Plan-A-Meeting (PAM) integration for Microsoft Exchange

Microsoft Outlook and Exchange Imposed Limitations for the EMS for Outlook Plugin Module

Rules regarding integration Microsoft Exchange and Outlook limit the functionality of the EMS for Outlook plugin module as described below:

Attachment Limitation

When using the EMS for Outlook plugin module to make a reservation or appointment, you can use Microsoft Outlook's native attachment function. The attachment, however, is *not* added to the EMS database. It resides only in Exchange.

Attendance Count Limitation

If you use the EMS for Outlook plugin module to make a reservation for a distribution list, the entire list is counted as a single attendee.

Changing a Booking as a Delegate Limitation

If you make a reservation in the EMS for Outlook plugin module and invite an attendee for whom you have delegation rights, and then attempt to modify the booking from your view of their calendar, the following message is displayed: "**Your web user id does not match the web user id on the reservation. Any changes to this meeting will disconnect the meeting from the EMS Reservation**." You must always modify a booking that you make from your own calendar.

EMS Cancel Reason Function Limitation

The native Cancel Reason function that is available in the EMS Desktop client and VEMS is not available for reservations that have been made with the EMS for Outlook plugin module.

Floor Plans and Meeting Room Images Limitation

When you make a reservation or appointment with the EMS for Outlook plugin module, the interactive EMS floor plan function (searching for open rooms in an interactive floor plan) is not available. You can, however, attach floor plan images to a room. The images are available for viewing as standard, static images.

Meeting Update Notification Limitation

The EMS for Outlook plugin module cannot circumvent the standard Microsoft Outlook behavior of notifying all attendees when any change is made to critical meeting information (location, date, and/or time). If you make any change to the critical information for a meeting, even for a single location or booking, through the plugin, then Microsoft Exchange generates and sends an update email to all the meeting invitees.

Offline Scheduling Limitation

A direct network connection to the Plan-A-Meeting web service is required to schedule appointments using the EMS for Outlook plugin module.

Outlook Web Application (OWA) Limitation

The EMS for Outlook plugin module works only with the Microsoft Outlook desktop application. It does not work with the Microsoft Outlook web application.

Recurring Meeting Limitation - Extending the Meeting without Selecting a Room

If you change the recurrence pattern of a meeting using the EMS for Outlook Plugin module, the location is removed from the meeting. You must select a location again before saving the meeting. The reservation, however, is still displayed on your calendar and all invitees' calendars in Microsoft Outlook.

Figure 1-3: Bookings cancelled in EMS if meeting recurrence pattern is changed
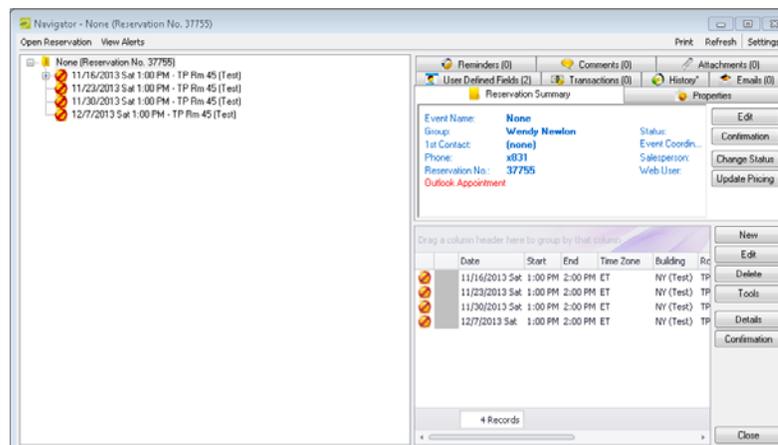
Recurring Meeting Limitation - Random Meetings

The module can be used just like Microsoft Outlook to schedule regular recurring appointments (day and time); however, if a reservation requires random recurring dates and times, these appointments must be scheduled individually in the plugin. None of these random appointments belongs to the same reservation. Each appointment gets its own unique reservation ID.

Recurring Meeting Limitation - Unavailable Room

When you are making reservation using the EMS for Outlook plugin module, the module books the entire series of dates even if the selected room is not available for all the meeting dates. A warning message is displayed in Outlook, and EMS automatically sends you a message that details the dates that the room is not available. (See Figure 1-5.) EMS also places the bookings into a Conflict status for the dates that the room is not available. (See Figure 1-6.)

Figure 1-4: Warning message if the selected room is unavailable

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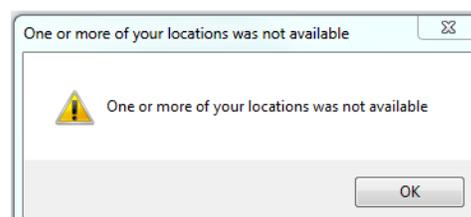
Figure 1-5: Automatic unavailable message

The bookings listed below do not have a location!!

Date	Event Start	Event End	Location
10/12/2013	7:30 AM	10:00 AM	Denver (Test) - Boardroom 1201 (Test)
10/19/2013	7:30 AM	10:00 AM	Denver (Test) - Boardroom 1201 (Test)

The above bookings do not have a location. If you feel you have received this message in error or have any other problem with the add in, please let Mike know. Thank you.
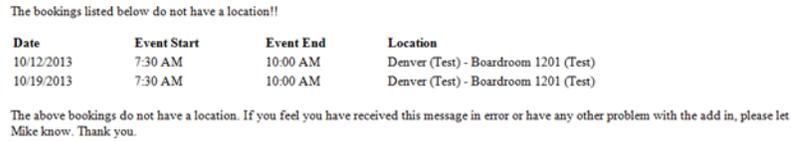
> *The customer configures the header and footer for this automatic unavailable message.*

Figure 1-6: Room placed into Conflict status in EMS Desktop client on the unavailable dates
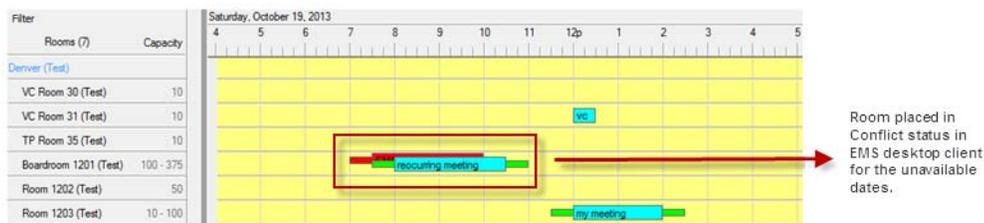
Recurring Meeting Limitation - Unique Booking Changes

If you make any change to one or more, but not all bookings, for a recurring meeting in the module (for example, you change the date and/or time pattern), and then extend the meeting, the following occurs:

- The original recurrence meeting is cancelled in its entirety in EMS.

- The recurrence meeting is built again with all the original bookings and the extended bookings in EMS.

- All the "exceptions" (locations and services) that were associated with the original bookings that you changed are canceled.

Figure 1-7: Exception cancellation message
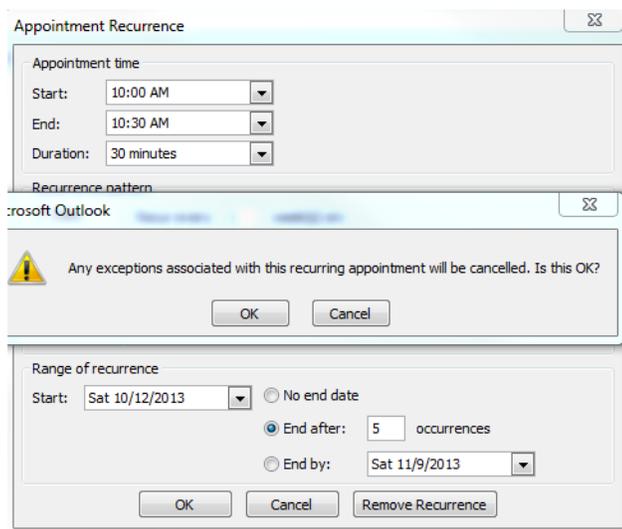
The following scenarios are examples that result in the cancellation of exceptions for a reservation made using the EMS for Outlook plugin module:

- Adding a service to one or more, but not all, the bookings.

- Changing the time for one or more, but not all, the bookings.

- An EMS Desktop client user adds a service to one or more, but not all, the bookings.

- An EMS Desktop client users adds another booking to the recurrence.

This additional booking is not tied to Exchange and it is not displayed on the user's calendar.

Figure 1-8:   Unique booking changes and results in EMS
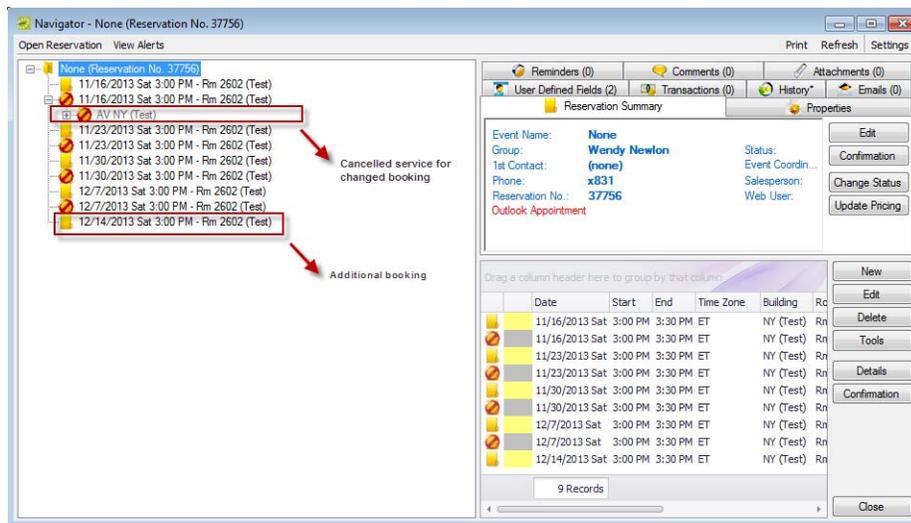
Room Filtering Limitation

When you are creating a reservation, it is often helpful to filter the list of available rooms. You can filter by capacity, room type, floor, and selected features in the EMS for Outlook plugin module.

The EMS for Outlook plugin module "remembers" the filters that you specify. Unless you modify the values, all subsequent room searches are carried out according to the filter values that you last specified.

Setup Type Limitation

In the EMS for Outlook plugin module, you cannot select a setup type for a scheduled room, for example, a banquet or a class room setup, which is unlike reservations made in VEMS or the EMS Desktop client application.

Translation Support Limitation

The only data that can be translated for the EMS for Outlook plugin module is the *configurable* data related to EMS such as the names of food items, room, buildings, categories, and so on. Full translation is available only with VEMS.

Visitor Management Limitation

Attendee category types (for example, Visitors) are not available in the EMS for Outlook plugin module. After you make a reservation and invite attendees using the EMS for Outlook plugin module, you must access the meeting in VEMS or the EMS Desktop client to add the attendee category type of Visitors. After you have added the attendee category type of Visitors in VEMS or the EMS desktop client, then the visitors are displayed on the Visitors Dashboard in the EMS Desktop client.

EMS for Outlook Operations

You can use the functions in the EMS for Outlook plugin module to check for available space for an event and to make a reservation for the event that is saved in your EMS database. You can search for rooms that are available for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings).

This chapter covers the following topics:

- "Creating a Single Reservation"
- "Creating a Series Reservation"
- "Creating a Video Conference Reservation"
- "Editing or Canceling a Scheduled Event"

Creating a Single Reservation

You can search for rooms that are available for a particular time on one day and create a simple reservation with one booking.

> *This section details the creation of a single reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see "Creating a Video Conference Reservation".*

To create a single reservation

1. Open Microsoft Outlook and create a standard event that includes the event subject, the date and time for the event, and invite the necessary attendees.

2. Click EMS Room Scheduling .

    By default, the EMS for Outlook plugin module opens in the Grid view for a single meeting date. The Grid view shows the attendees' free/busy schedules for the scheduled event date. Rooms that can be booked for the event are displayed below the attendee list as well as their minimum and/or maximum capacities.

> *The EMS for Outlook plugin module "remembers" the building/area/view that you last selected.*

Figure 2-1:   EMS plugin module, Grid view
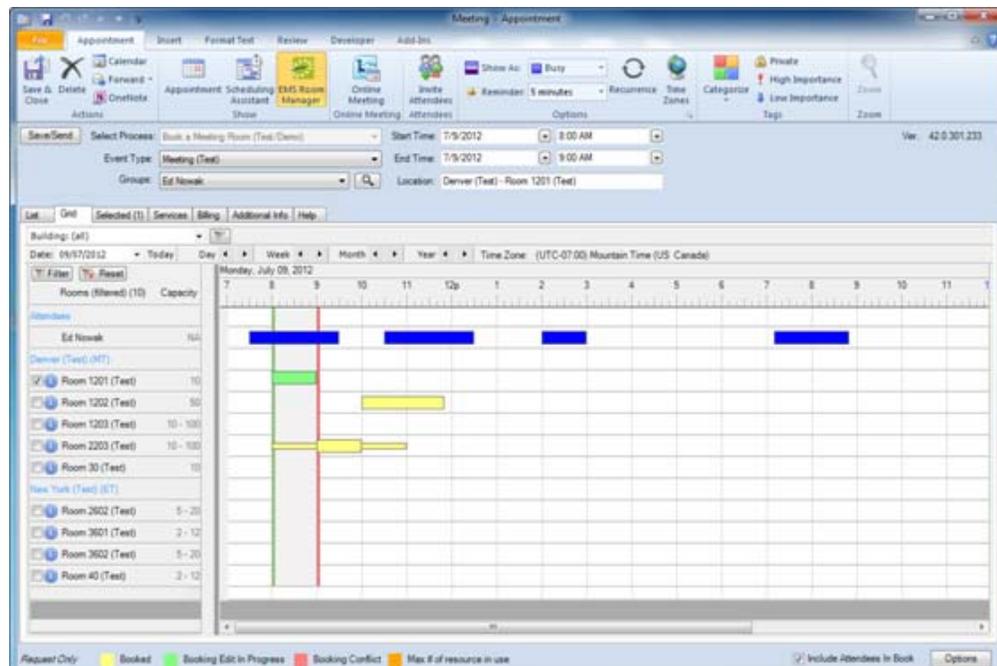
3. On the Select Process dropdown list, select the type of reservation that you are making.

4. On the Event Type list, select the event type for the event.

> *The Start Time and the End Time are pulled from the initial event information that you specified when creating the event in Outlook. You can edit these values. See "Editing or Canceling a Scheduled Event" .*

5. If applicable, click the Search icon next to the Groups field to open the Manage Groups window and search for the group for which you are making the reservation.

> *You might be able to make a reservation only for yourself, and therefore, this step is not applicable.*

Figure 2-2:   Manage Groups window
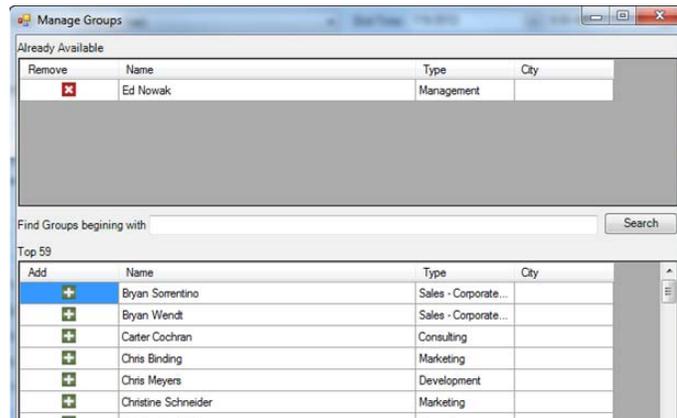
6. Optionally, before you select a room for the event, you can do one or more of the following:

   • Click the Information icon next to a room to open a Locations Details dialog box that displays information about the room, such as its properties, setup type, features, images (if available), and so on.

Figure 2-3:   Details dialog box showing information for a room
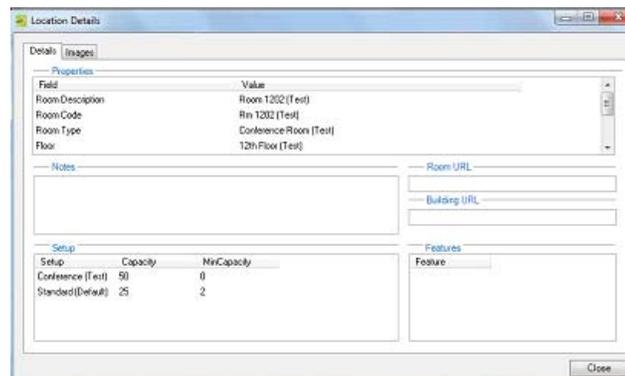
- Click Filter ▼ Filter above the list of rooms to open the Availability Filters dialog in which you can specify filters (Room Type, Floor, Features, and/or Capacity) to limit the display of available rooms.

Figure 2-4: Availability Filters
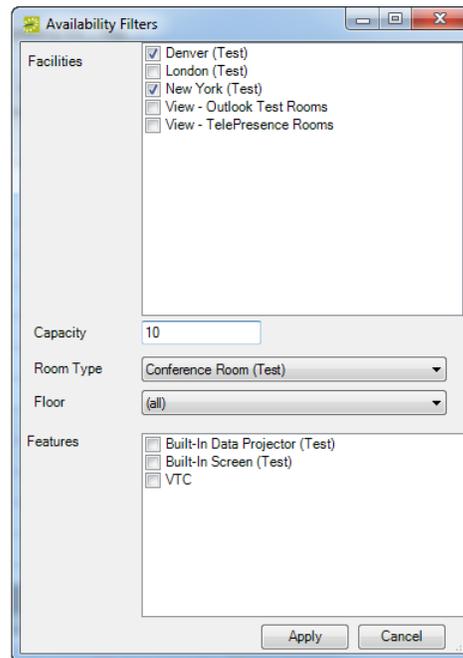
- On the Building dropdown list, select a specific building to the limit the display of available rooms to only those rooms in the selected building.

You can also create list of favorite rooms that can be searched for availability when you are scheduling a meeting. See "To create a list of Favorite rooms".

7. Select the event room.

   A "Booking Edit in Progress" status (green color) is displayed for the room. The Selected tab indicates that one room has been selected for an event. (See Figure 2-5.) Also, Setup and Teardown times might be displayed for the selected room. You can place your cursor on the entry for a room to view information about the scheduled event. (See Figure 2-6.)

Figure 2-5: Booking Edit in Progress status for a room
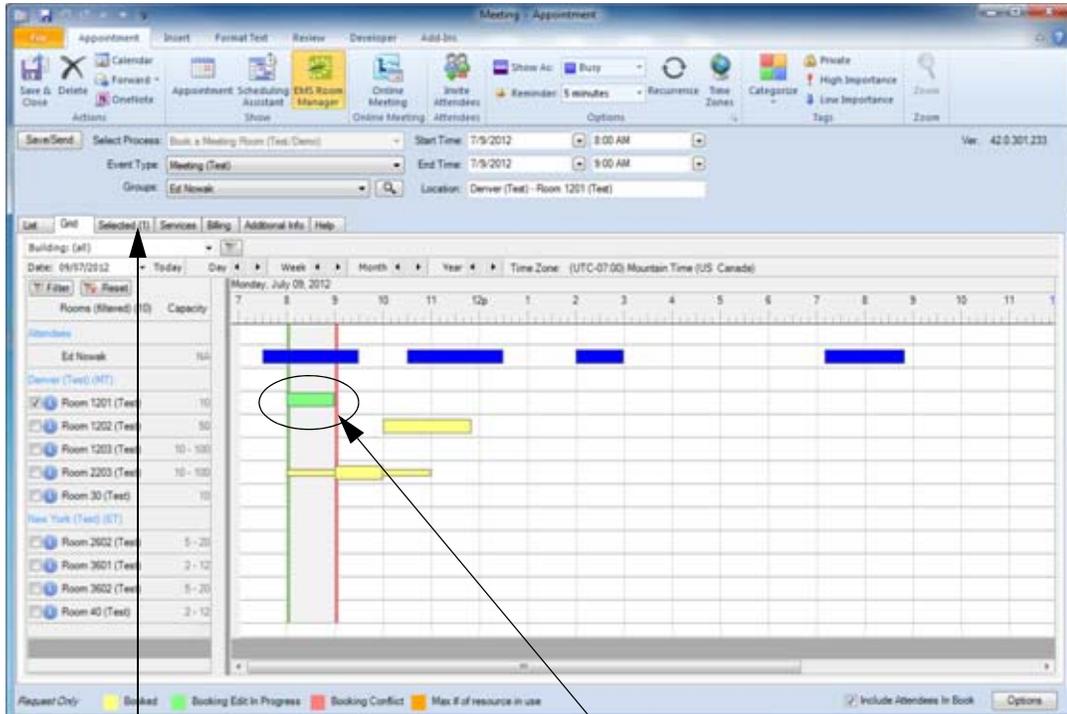
Selected tab indicates that one room has been scheduled.

Booking Edit in Progress status for a scheduled room. Bar indicates the event time and location

Figure 2-6: Setup and teardown times displayed for a selected room
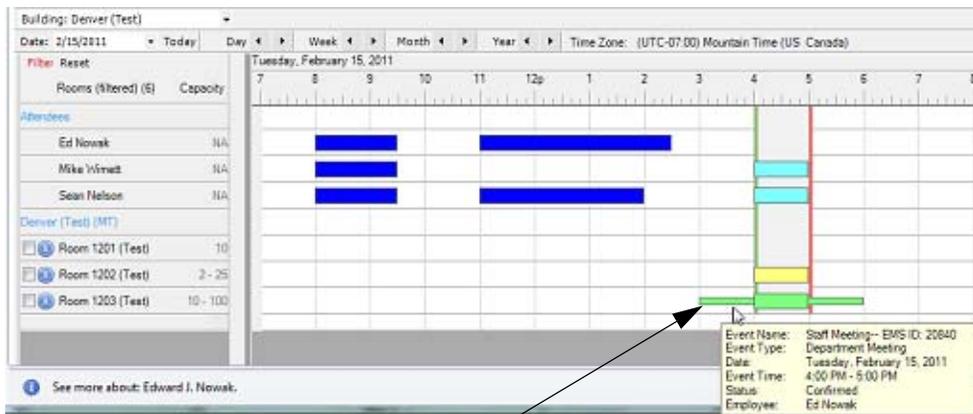
Left bar indicates setup time. Middle bar indicates event time and location. Right bar that indicates teardown time. Place your cursor on the room entry to view information about the scheduled event.

8. Optionally, open the Selected tab to view information about the selected room, such as the building in which it is located, its description, and its capacity. If needed, you can do one or both of the following:

- Click Remove to remove the room for the scheduled event so that you can select a different room.

- Edit the attendance in the Attendance column.

Figure 2-7:   Selected tab showing a room selected for a meeting

9. Optionally, you might be able to request services for the event, supply billing information for the event, and/or answer additional questions about the event.

- Services tab—The Services tab might be available for requesting one or more services for the event, such as Catering, A/V Equipment, and so on. If you can request services for an event, you might be required to make selections for some of these services and you might also be required to answer questions about the services that you select. After you select a service for an event, click Apply to add the service to the event.

Figure 2-8:   Services tab for a single booking
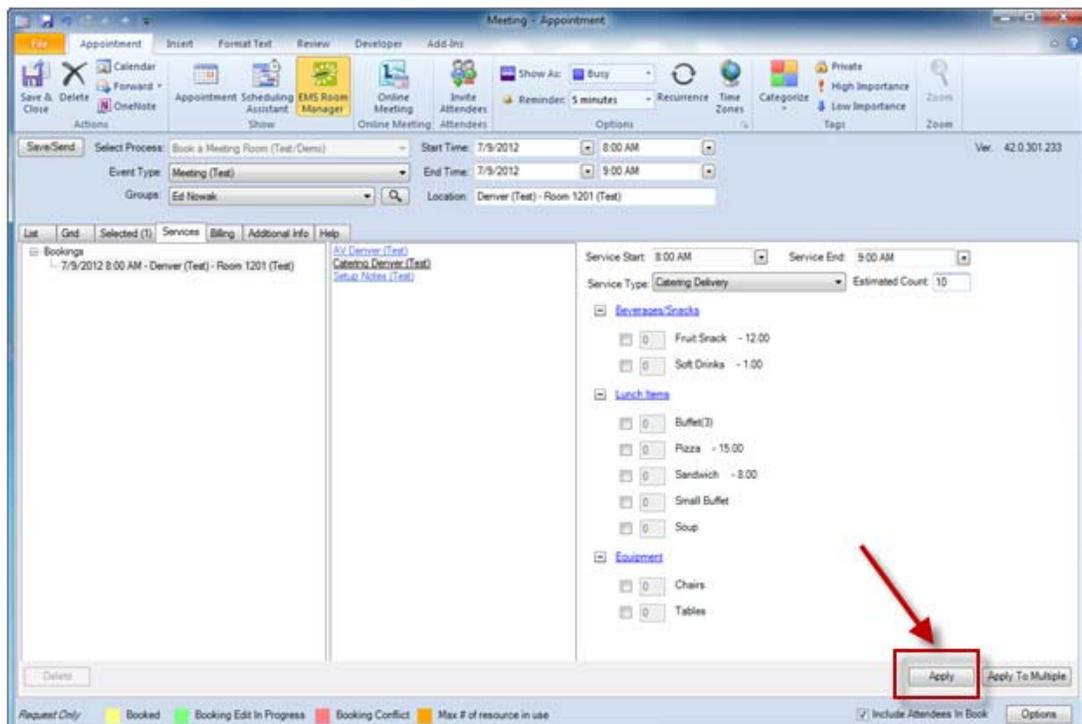
- Billing tab—The Billing tab might be available for providing billing information about the event. You can manually enter the billing information for the event, or you can click the Search icon Q to open a Lookup dialog box and search for a specific billing reference number and/or PO number to add to the event.

Figure 2-9:   Billing tab
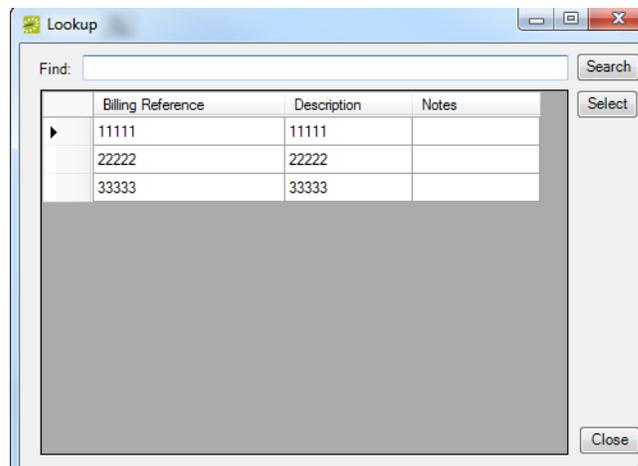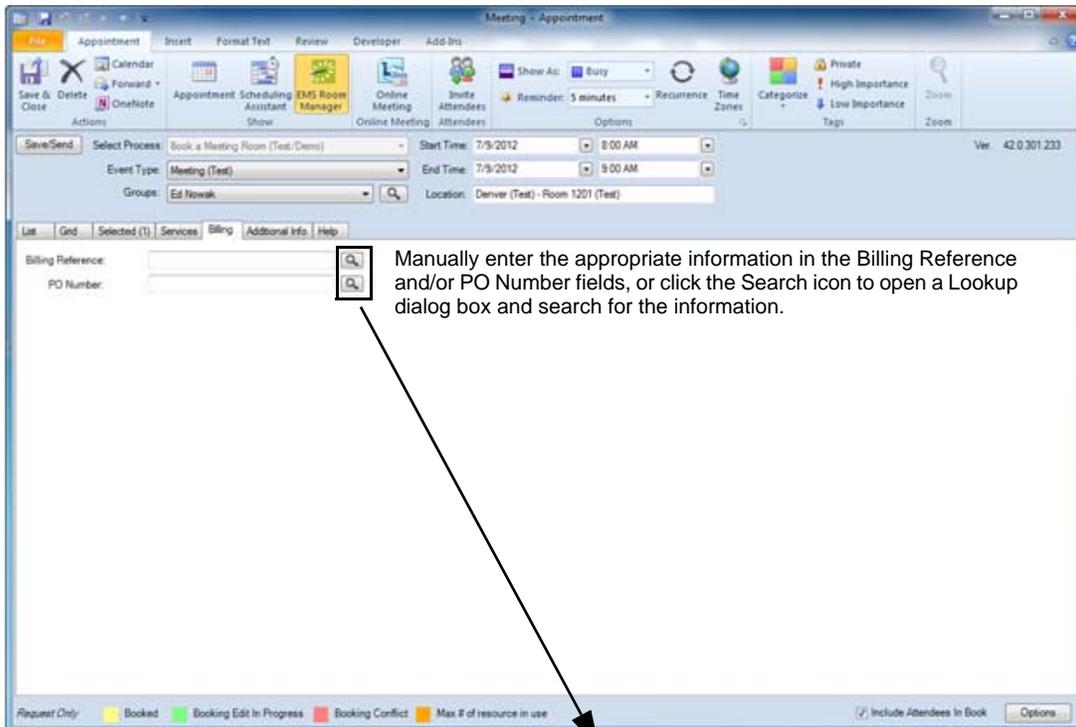
- Additional Information tab—You might be required to answer one or more questions about the scheduled event, or the questions might be optional.

Figure 2-10: Additional Info tab
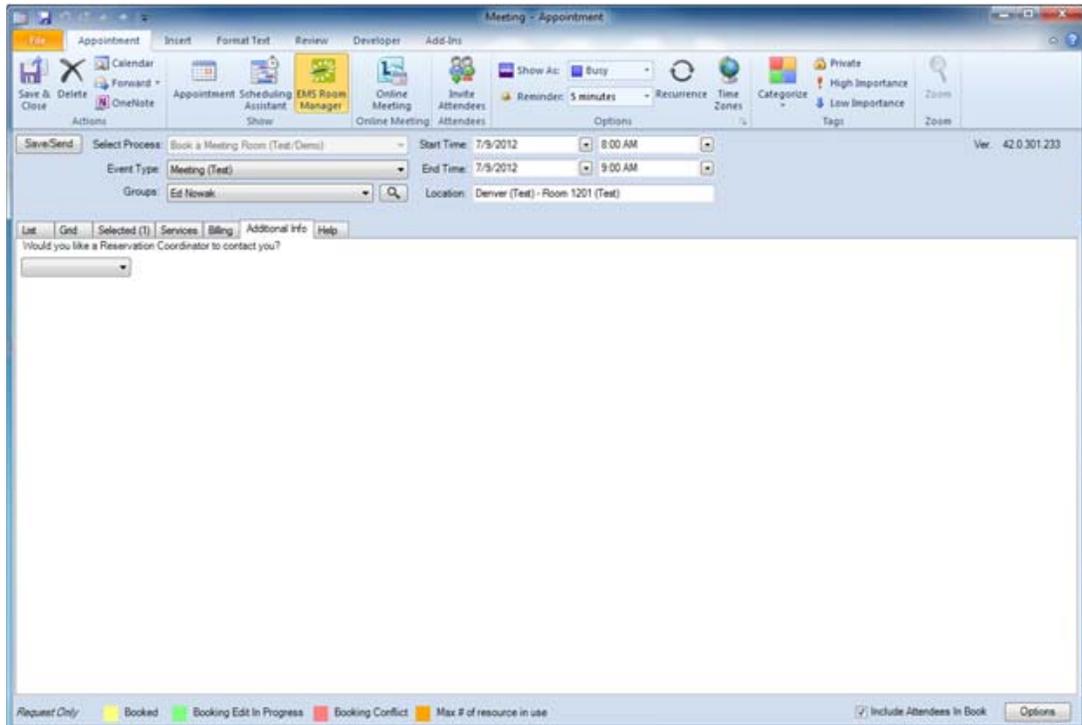
- Help tab—The Help tab might contain custom help text or policies and procedures that are specific to your organization. You might want to open this tab and review this information before you complete the reservation.

10. Click Save/Send.

The selected room is booked in the EMS database. The event is automatically added to your Outlook calendar. The invited meeting attendees receive a standard invitation for the meeting. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status is indicated as "Booked." See Figure 2-11.

Figure 2-11: Showing a room as booked in the EMS for Outlook plugin module

Booked room
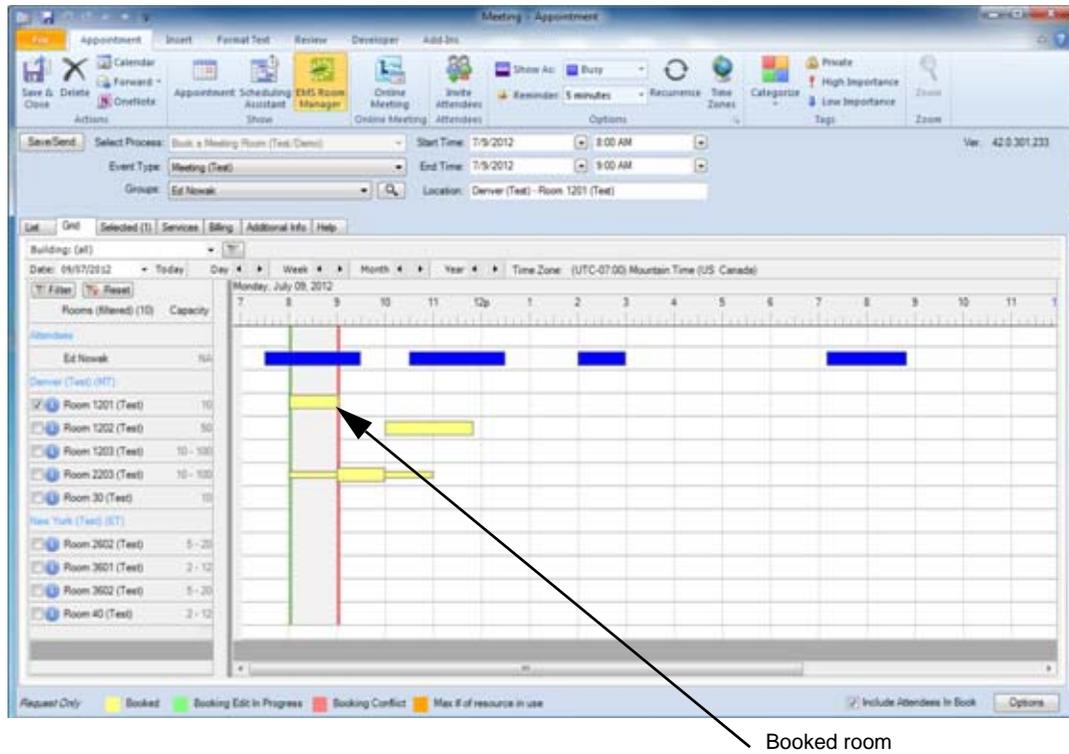
To create a list of Favorite rooms

1. Click Options.

    The Manage Favorites dialog box opens.

Figure 2-12: Manage Favorites dialog box
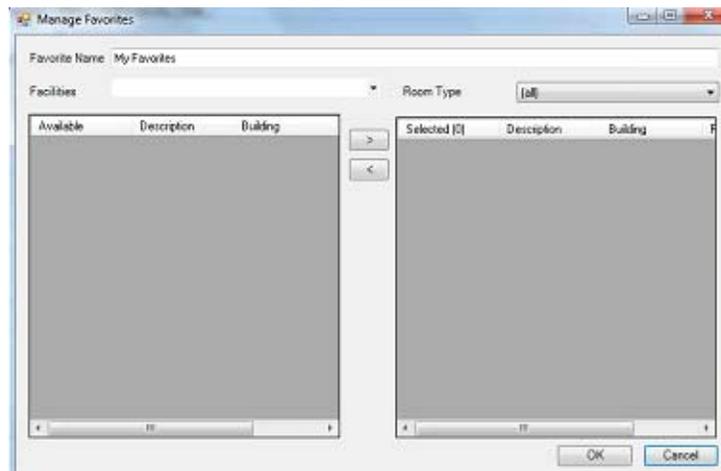
2. On the Facilities dropdown list select a specific building.

    A list of all rooms in the selected building are displayed in the Available list.

3. Optionally, on the Room Type dropdown list, select a specific room type by which to filter the list of displayed rooms.

4. Select a room, or CTRL-click to select multiple rooms, and then click the Move (>) button to move the selected rooms to the Selected list.

5. Click OK.

    The Manage Favorites dialog box closes. The rooms in your Favorites list, which are available under Views, are the only rooms that are displayed in the EMS for Outlook plugin module after you select Views > My Favorites.

Figure 2-13: Opening your My Favorites list
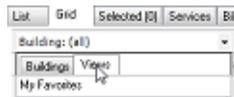
Creating a Series Reservation

You can search for rooms that are available for a particular time on multiple days and create a series reservation, which is a single reservation with multiple bookings.

> *This section details the creation of a series reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see "Creating a Video Conference Reservation".*

To create a series reservation

1. Open Microsoft Outlook and create a standard *recurrent* event that includes the event subject, the date and time for the event, and invite the necessary attendees.

2. Click EMS Room Scheduling .

   By default, for a recurring meeting, the EMS for Outlook plugin module opens in the List view. The List view shows the availability for all the rooms. For example, in Figure 2-14 below, for a recurrent meeting with four meeting dates, Room 1201 is available for three out of the four meeting dates and Room 1202 is available for all four meeting dates.

Figure 2-14: Available rooms shown in List view

3. On the Select Process dropdown list, select the type of reservation that you are making.

4. On the Event Type list, select the event type for the event.

> *The Start Time and the End Time are pulled from the initial event information that you specified when creating the event in Outlook. You cannot edit these values.*

5. If applicable, click the Search icon ![Q] next to the Groups field to open the Manage Groups window and search for the group for which you are making the reservation.

> *You might be able to make a reservation only for yourself, and therefore, this step is not applicable.*

Figure 2-15: Manage Groups window
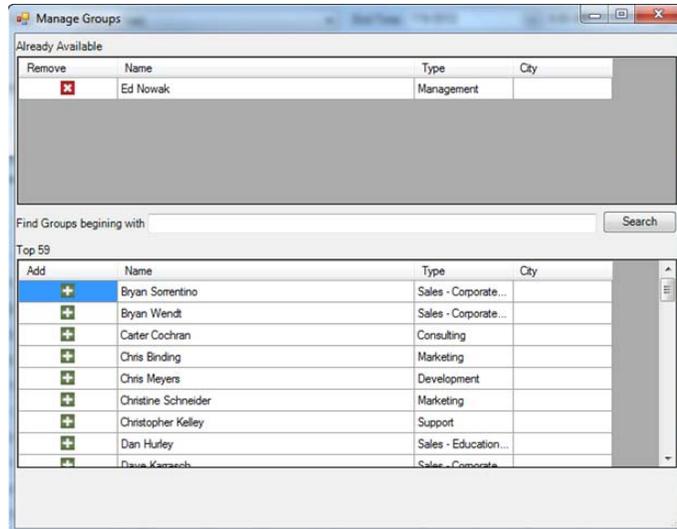
6. Optionally, before you select a room for the event, you can do one or more of the following:

    •   Click the Information icon ![i] next to a room to open a Locations Details dialog box that displays information about the room, such as its properties, setup type, features, images (if available), and so on.

Figure 2-16: Details dialog box showing information for a room
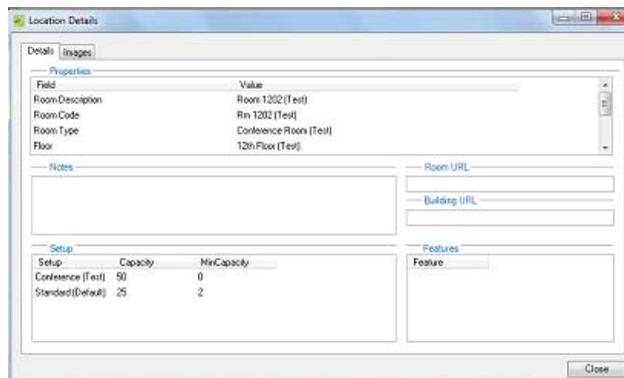
- Click Filter ▼ Filter above the list of rooms to open the Availability Filters dialog in which you can specify filters (Room Type, Floor, Features, and/or Capacity) to limit the display of available rooms.

Figure 2-17: Availability Filters
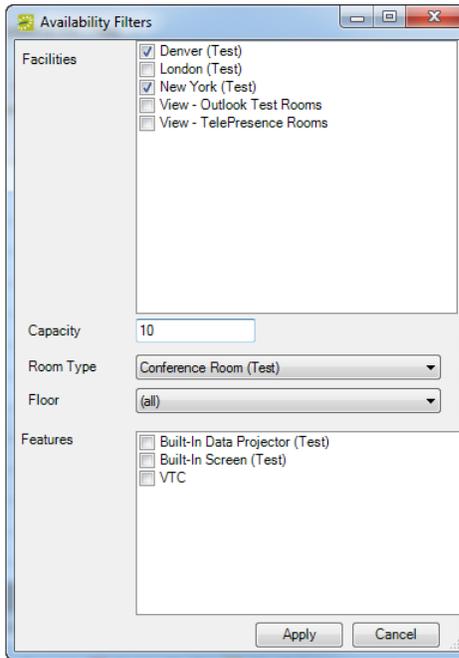
- On the Building dropdown list, select a specific building to the limit the display of available rooms to only those rooms in the selected building.

You can also create list of favorite rooms that can be searched for availability when you are scheduling a meeting. See "To create a list of Favorite rooms".

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7. Select the event room.

   The Selected tab indicates that one room has been selected for an event.

You can select a room even if the room is not available for all the event dates. The room will be marked as being in conflict in the EMS for Outlook plugin module, and you can resolve this conflict for each occurrence in a series reservation as needed. See "To resolve a booking in conflict".

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8. Optionally, open the Selected tab to view information about the selected room, such as the building in which it is located, its description, and its capacity. If needed, you can do one or both of the following:

- Click Remove to remove the room for the scheduled event so that you can select a different room.

- Edit the attendance in the Attendance column.

Figure 2-18: Selected tab showing a room selected for a meeting

9. Optionally, you might be able to request services for the event, supply billing information for the event, and/or answer additional questions about the event.

- Services tab—The Services tab might be available for requesting one or more services for the event, such as Catering, A/V Equipment, and so on. If you can request services for an event, you might be required to make selections for some of these services and you might also be required to answer questions about the services that you select. You can select a single booking, and then click Apply to the apply the service to the selected booking, or you can click Apply to Multiple to open the Apply to Additional Bookings dialog box and select the additional bookings to which to apply the services.

Figure 2-19: Services tab for multiple bookings
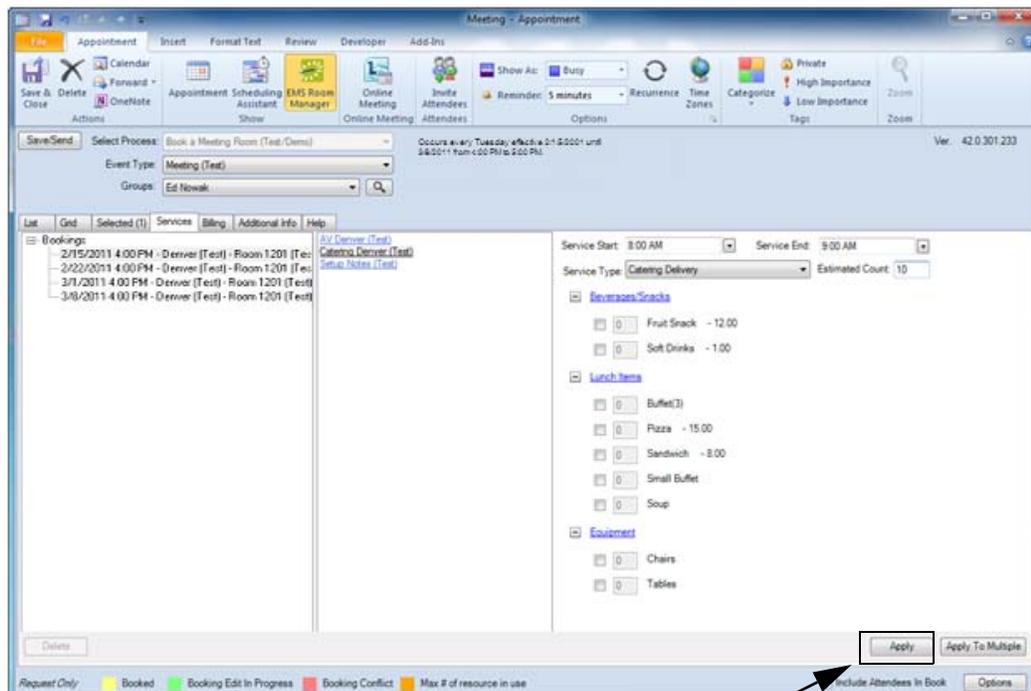
You can apply the selected services to a single booking or to multiple bookings.

- Billing tab—The Billing tab might be available for providing billing information about the event. You can manually enter the billing information for the event, or you can click the Search icon Q to open a Lookup dialog box and search for a specific billing number and/or PO number to add to the event.

Figure 2-20: Billing tab
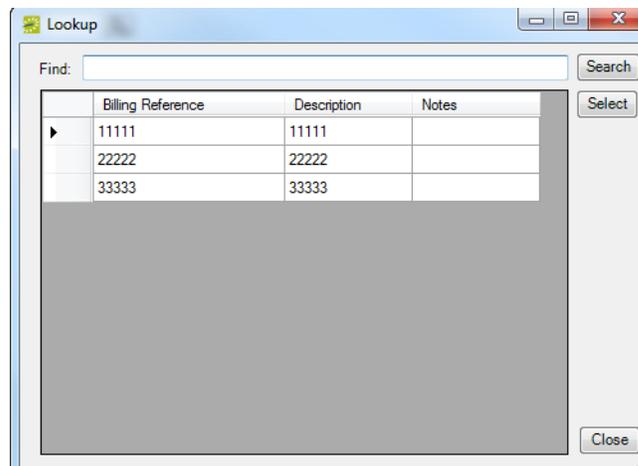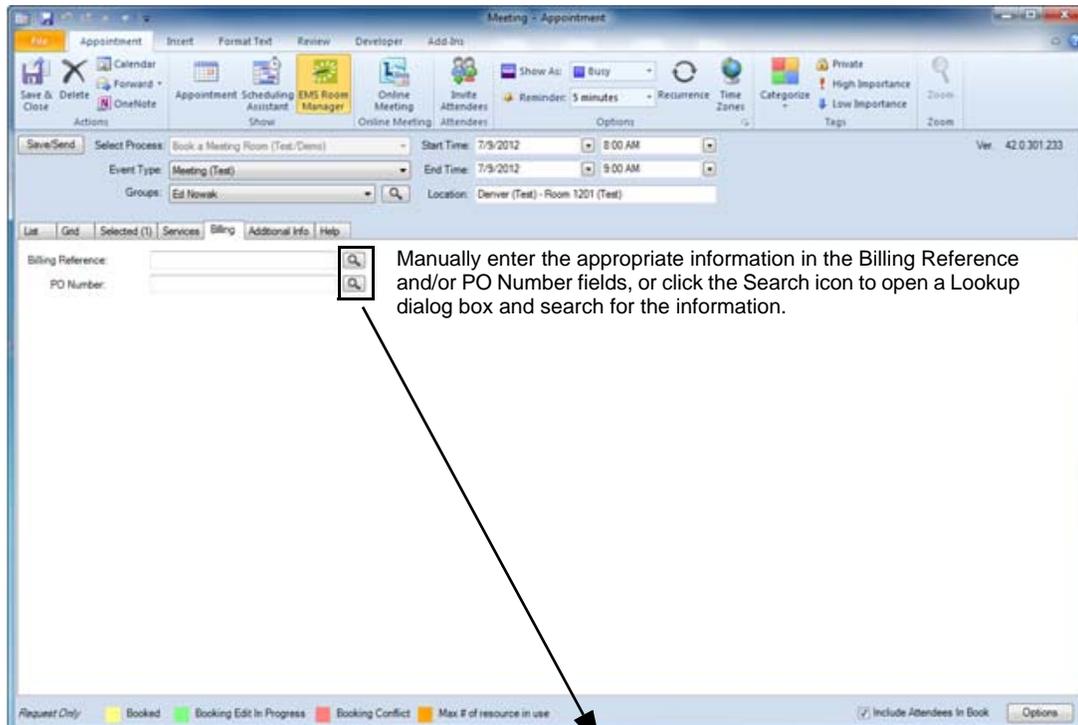
Manually enter the appropriate information in the Billing Reference and/or PO Number fields, or click the Search icon to open a Lookup dialog box and search for the information.

- Additional Information tab—You might be required to answer one or more questions about the scheduled event, or the questions might be optional.

Figure 2-21: Additional Info tab
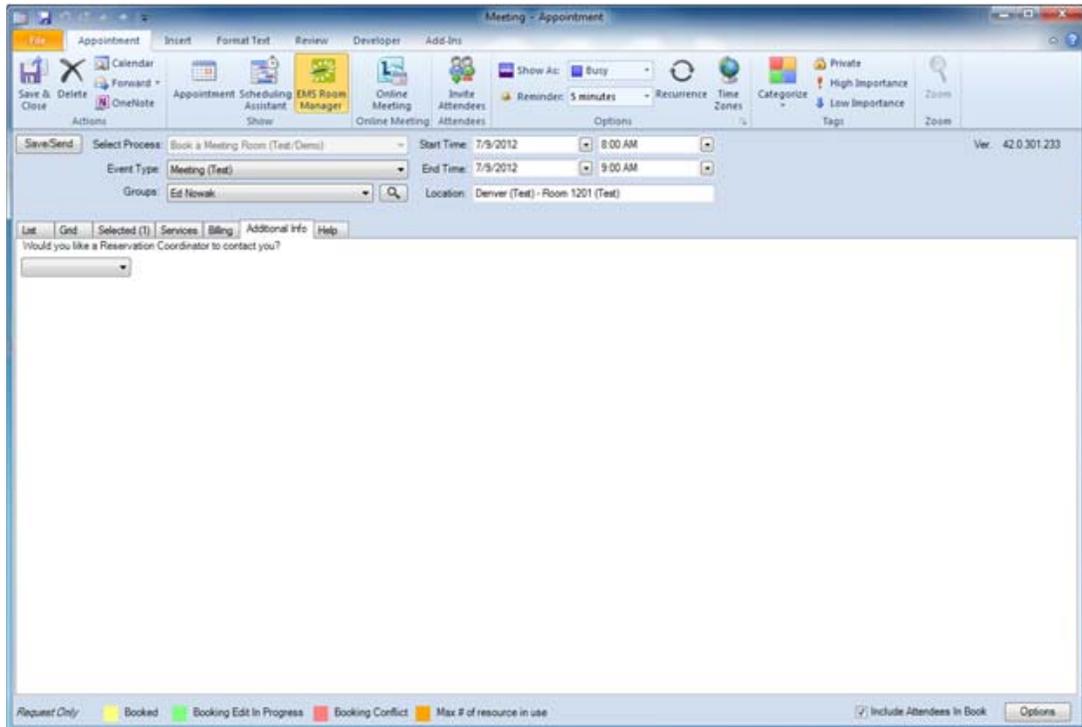
- Help tab—The Help tab might contain custom help text or policies and procedures that are specific to your organization. You might want to open this tab and review this information before you complete the reservation

10. Click Save/Send.

The selected room is booked in the EMS database. The event is automatically added to your Outlook calendar, even if the selected room was not available for all the dates. If the selected room was not available for one or more of the event dates, a message opens indicating this. As the meeting scheduler, you also receive a Booking Error email that indicates the reservation number and the bookings that were in conflict for the reservation.

Figure 2-22: Message indicating that the one or more of the locations was not available
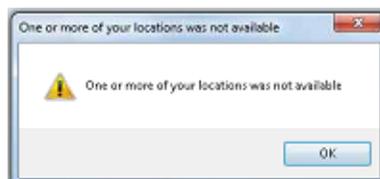
Figure 2-23: Booking error message for a booking conflict
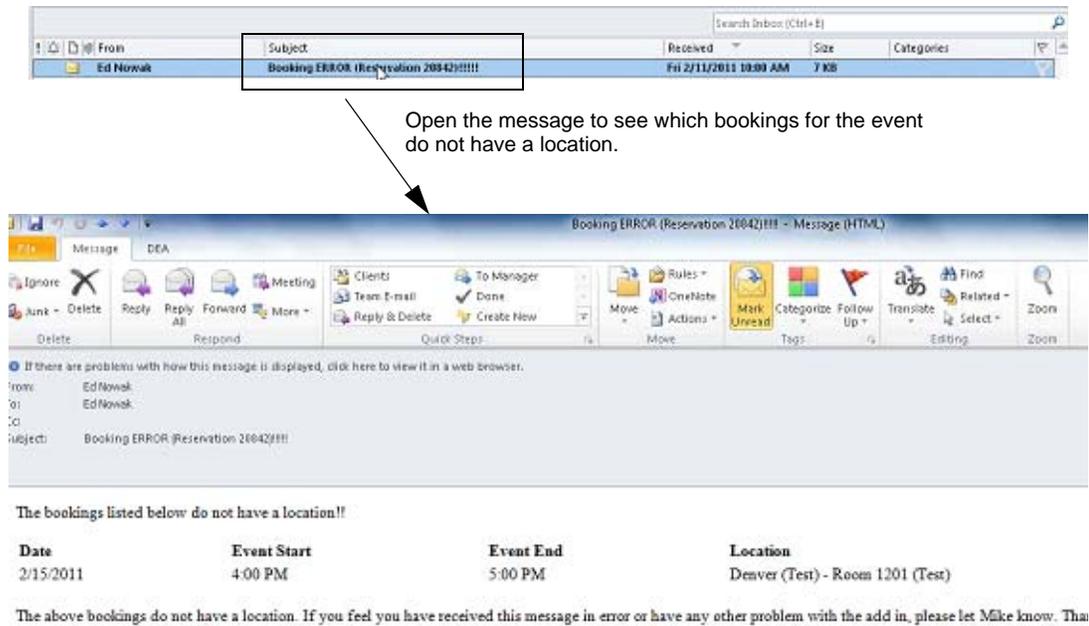
Open the message to see which bookings for the event
do not have a location.

You can resolve this conflict for each occurrence in a series reservation as needed. See "To resolve a booking in conflict".

Regardless of the meeting room availability, all the invited meeting attendees receive a standard Outlook invitation. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status is indicated as "Booked" for the event dates for which the room is available, and "Booking in Conflict" for the event dates for which the room is unavailable. See Figure 2-24.

Figure 2-24: Showing a booking in conflict the EMS for Outlook plugin module
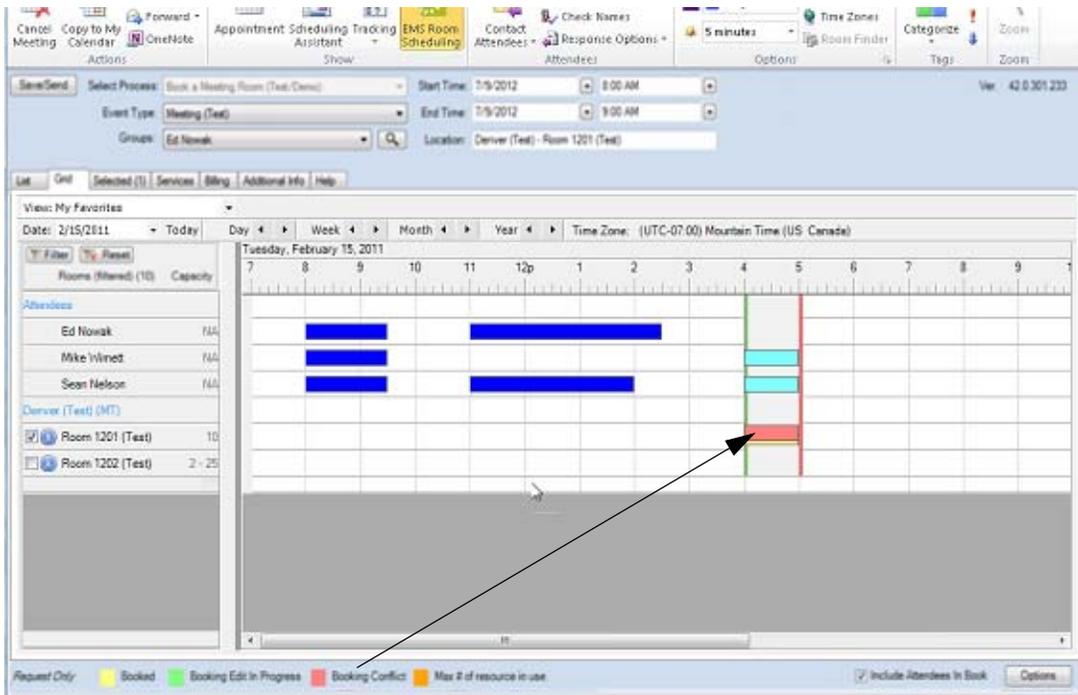
To resolve a booking in conflict

1. Open your Outlook calendar.

2. In the calendar, double-click the event date for which a booking is in conflict.

    An Open Recurring Item message opens. The message indicates that the event recurring and asks you if want to open only this occurrence of the event, or the series.

Figure 2-25: Open Recurring Item message

3. Leave Open this occurrence selected, and then click OK.

    The EMS for Outlook plugin module opens, showing the booking that is in conflict.

4. In the Rooms list, select a room that is available for the booking.

   The booking status is changed from Booking Conflict to Booking Editing in Progress.

5. Click Save/Send.

   The selected room is booked in the EMS database. The event is updated in your Outlook calendar to reflect the new location. All the invited meeting attendees receive a standard Outlook message about the updated meeting location. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status for the newly selected room is indicated as "Booked" for the event date.

Figure 2-26: Room status now showing as booked for an event date that was in conflict
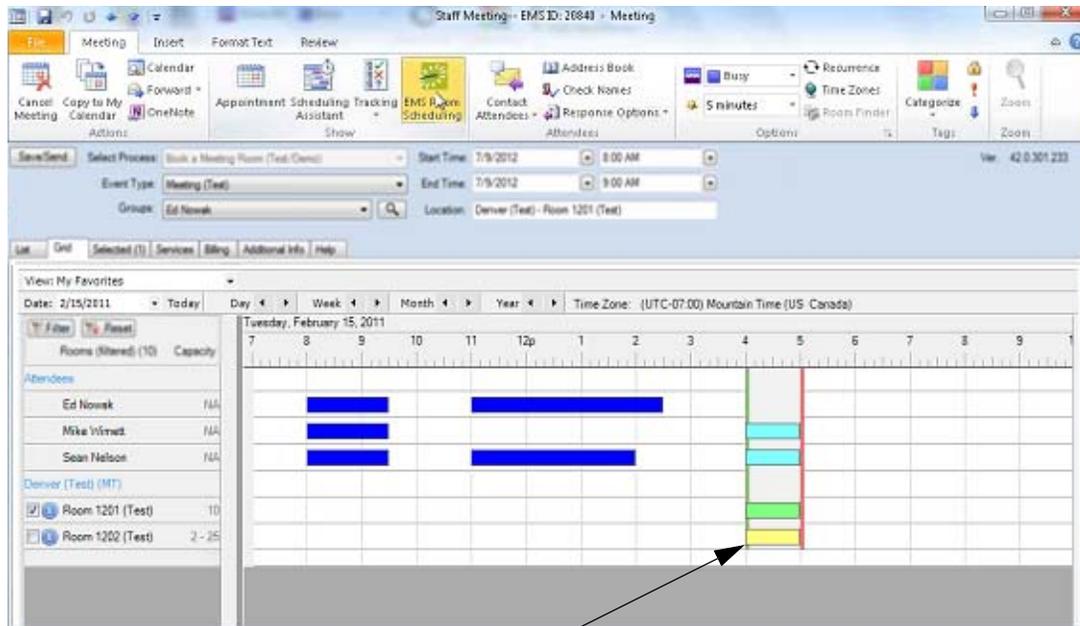
Different room showing as booked for an event date.

6. Repeat Step 1 through Step 5 for each booking date that is in conflict.

Creating a Video Conference Reservation

You can create a video conference reservation for both a single reservation and a series reservation. When you create a video conference reservation, two room options are available:

- The room is a dedicated video conferencing room. (The room has built-in video conferencing features.)

- The room has no built-in video conferencing features. Instead, you must use a mobile video conferencing cart in the room.

You follow the appropriate steps to create a single reservation (see "Creating a Single Reservation") or a series reservation (see "Creating a Series Reservation", noting the following differences for a video conference reservation:

- A video conference reservation requires two rooms. You must always designate the capacity for each room, and you must indicate which room is the *host* room.

Figure 2-27: Video Conference Room dialog box
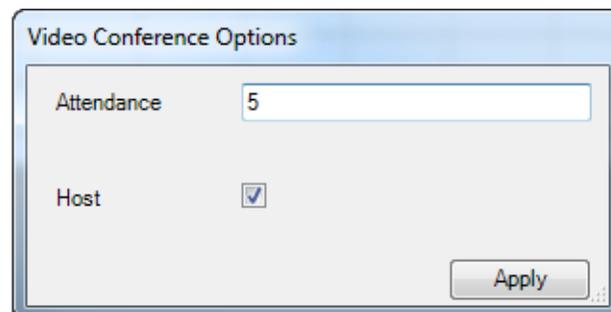
- If a room that you select for a video conference reservation requires a mobile video conferencing cart, and at least one mobile video conferencing cart is available, then an orange line is displayed for the room. After you book the room, the standard booking color of yellow with an orange line above it is displayed to indicate that you have successfully booked the room and a cart for the room.

- If a room that you select for a video conference reservation requires a mobile video conferencing cart, but no carts (resources) are available to book, then a solid orange rectangle is displayed for the room to indicate that the maximum number of resources are in use and you cannot book the room.

- If a room that you select for a video conference reservation has built-in video conferencing features and the room is available to book, then no color is initially displayed for the room. After you book the room, the standard booking color of yellow is displayed to indicate that you have successfully booked the room.

After you successfully book a video conference reservation, the host room is indicated on the Selected tab. See Figure 2-28 and Figure 2-30.

Figure 2-28: Video Conference Room Availability Indicators
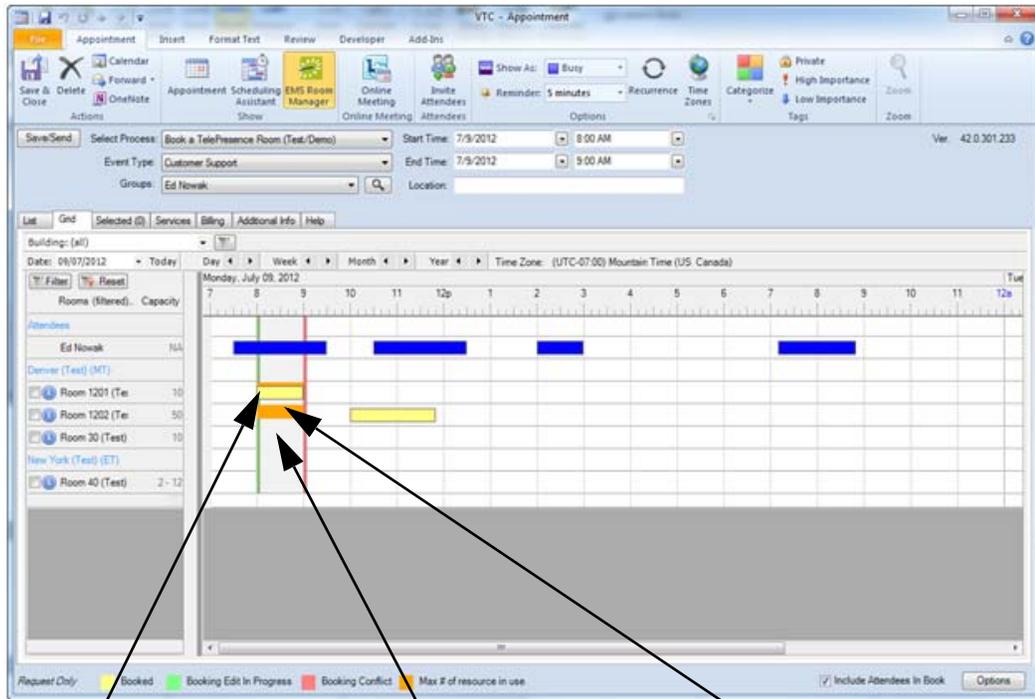
Room 1201 successfully booked with a mobile video conference cart.

Room 30 has built-in video conferencing features and is available for booking.

Room 1202 cannot be booked as no mobile video conferencing carts are available.

Figure 2-29: Host room indicated on the Selected tab for a video conference reservation
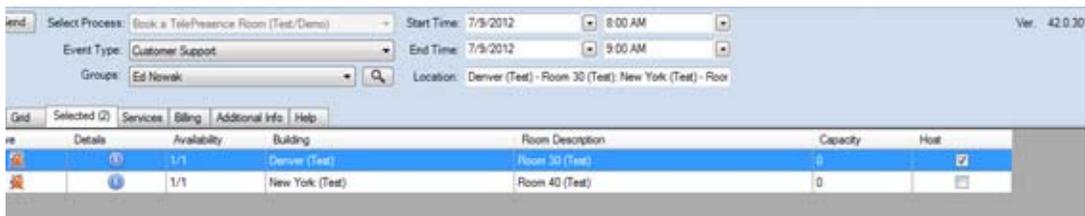
Editing or Canceling a Scheduled Event

You can edit or cancel both a single reservation and a series reservation in the EMS for Outlook plugin module.

To edit or canceled a scheduled event

1. Open your Outlook calendar.

2. In the calendar, double-click an event date.

   - If the reservation is a single reservation, then the meeting information opens in the standard Outlook meeting format. If needed, edit the Start Time and/or End Time, and then click EMS Room Scheduling   .
     The EMS for Outlook plugin module opens in the Grid view, which shows the attendees' free/busy schedules for the scheduled event date. (See Figure 2-1.) You can edit any and all of the information for the scheduled event as needed (see Step 3 through Step 10 of "To create a single reservation") or you can click Delete to cancel the event.

   When you are editing an event, if you want to cancel a scheduled service, you can open the Services tab and clear the selection for the service.

   - If the reservation is a series reservation, then an Open Recurring Item message opens. The message indicates that the event is recurring and asks you if want to open only this occurrence of the event, or the series. Continue to Step 3.

Figure 2-30: Open Recurring Item message

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3. Do one of the following:

    *   To edit the Start Time and/or End Time for a single occurrence of a series reservation, leave Open this occurrence selected, and then click OK.

    *   To edit any value other than the Start Time and/or End Time for all bookings for a series reservation in a single step, select Open the series, and then click OK.

4. Click EMS Room Scheduling 🔲 .

    The EMS for Outlook plugin module opens in the Grid view, which shows the attendees' free/busy schedules for the scheduled event date. (See Figure 2-1.) You can edit any and all of the information for the scheduled event as needed (see Step 3 through Step 10 of "To create a series reservation"), or you can click Delete to cancel the event.

When you are editing an event, if you want to cancel a scheduled service, you can open the Services tab and clear the selection for the service.

EMS for Outlook Plugin Module Alerts and Error Messages

During the course of using the EMS for Outlook plugin module to schedule reservations and make appointments, you might encounter alerts and error messages. This appendix details the known alerts and error messages for the module and provides an explanation for each.

This appendix covers the following topics:

- "Known Alerts and Errors for the EMS for Outlook Plugin Module" .

Known Alerts and Errors for the EMS for Outlook Plugin Module

Alert/Error Message	Description
Alerts	
Resource Alert	Customer-specified resource alerts are displayed when a user selects a resource.
Room Alert	Customer-specified room alerts are displayed when a user selects a room.
Errors	
You have an unapplied service order. Are you certain you wish to continue?	Displayed if a user has entered a service order, but clicks Save before clicking Apply.
Appointment "SUBJECT" is tied to an EMS Booking.	Displayed when a user attempts to copy or cut a meeting on a calendar that is linked to EMS.
The meeting you are viewing is no longer being monitored by EMS. Changing this meeting will disconnect the meeting from EMS.	• Displayed if a user opens a meeting that has occurred in the past. • Prior to build 43.0.28 - In inconsistent scenarios, this message was displayed when a user created a creating on a delegate's calendar and then tried to modify the meeting.
Your web user id does not match the web user id on the reservation. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a meeting for which they are not the web user.
This reservation has been invoiced. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a meeting that has been invoiced.
This reservation is assigned to a process template that is unavailable to you in Outlook. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a reservation that is tied to a process template to which they do not have access to or is not available in Outlook.
EMS requires all meetings be 24 hours or less.	Displayed if a user sets a start/end date/time combination to anything greater than 24 hours.

Alert/Error Message	Description
You changed the time after changing the location which invalidated your locations.	Displayed if a user: • Changes the meeting time after selecting a meeting location. • Changes the meeting recurrence any in way after selecting a location. **Note:** A user must verify a room after changing times or recurrences.
One or more of your locations was not available.	Displayed when a user attempts to save a meeting and one or more of the EMS rooms requested was not available.
One or more of your services violated the available quantity and was not applied to your meeting.	Displayed when a user attempts to save a meeting that has a service order and one or more of the resources had insufficient quantities available.
There was a problem saving your reservation in EMS.	Displayed when EMS encounters an unexpected error trying to save the reservation in EMS
Your request would violate the maximum allowed duration for a reservation ({0} minutes).	Displayed when a user attempts to add a booking that violates the Max Minutes Allowed value as specified by the Web Process template.
This template only allows for {0} booking(s) at a time.	Displayed when a user attempts to add a booking that violates the Max Number of Bookings value as specified by the Web Process template.
Terms must be accepted.	Displayed if a user does not select the option to accept Terms and Conditions.
Event type is required.	Displayed if a user attempts to submit an entry without an event type being selected.
Group is Required.	Displayed if a user has not selected a group. (Group label used in message.)
Use the Send Cancellation button on the appointment tab.	Displayed in the meeting cancel notification if a user attempts to press the EMS Save/Send button.
There was a problem updating one or more of your EMS bookings that are part of this recurring meeting. You may not have location for some of you times.	Displayed when an element failed while attempting to move a meeting on the Outlook calendar, typically because the location was not available for the time requested.
Bookings are not allowed before {0:d}.	Displayed if a user attempts to book a meeting prior to the first allowable booking date that is defined in the customer's Web Process template.
This template allows only {0} bookings before {1:d}.	Displayed if a user attempts to book more bookings than allowed in the date range that is specified in the customer's Web Process template.

Alert/Error Message	Description
This template allows only {0} bookings per date.	Displayed if a user attempts to book multiple bookings on a single day and the number exceeds the allowable amount that is defined in the customer's Web Process template.
Problem with system timezone records.	Displayed if an unexpected time zone issue was encountered while saving a room.
Booking would exceed the twenty four hour limit.	Displayed when a user is selecting a room and the booking exceeds 24 hours in duration.
First available booking date violation.	Displayed if a user selects a room and the user has not specified enough advance lead time as defined in the user's Web Process template.
Bookings not allowed to begin in the past.	Displayed when a user selects a room and the start time is prior to the current time.
Request violates building hours.	Displayed when a user selects a room and the booking falls outside the customer's defined "Open" hours for the room's building.
Request would create a conflict with another booking.	Displayed when a user selects a room and the room has a conflicting booking already on the calendar.
This template allows only {0} bookings before {1:d}.	Displayed when a user selects a room and the Web Process template specifies a limited allowable number of bookings.
You cannot book multiple parts of a combo room.	Displayed if a user attempts to book multiple pieces of the same combo room.
No locations match your criteria.	Displayed when changing tabs/applying a filter and no locations match.
No services selected.	Displayed when a user clicks Apply without first selecting a category or resource.
The grouping {0} of resource {1} requires that you select at least {2} item(s).	Displayed when a user attempts to apply services and the user has not met the minimum ""Selections"" requirement as defined by the customer.
The grouping {0} of resource {1} requires that you select no more than {2} item(s).	Displayed when a user attempts to apply services and the user has exceeded the maximum "Selections" requirement as defined by the customer.
You are adding a note, but didn't supply a note.	Displayed while a user is applying services.
Service Start is required.	Displayed if a user applies services without specifying a service start time.
Service End is required.	Displayed if a user applies services without specifying a service end time.

Alert/Error Message	Description
Your service order times must be contained within event time.	Displayed if a user applies services and the service start/end times fall outside the event time.
Estimated Count is required.	Displayed if a user applies catering services without specifying the estimated count.
Your request does not meet the minimum amount of {0:F2}.	Displayed if a user applies services and the monetary total of the requested resources falls below the customer-specified minimum amount.
EMS For Outlook has not been initialized. Any changes made to meetings tied to EMS For Outlook will break the connection to EMS. Check network connectivity, then close and reopen Outlook. If the problem persists, please contact your local help desk.	Displayed when Outlook is opened and: • The user's computer cannot contact to the PAM Web Service. • The EMS license is invalid. • The current user has no assigned Web Process templates. • The current user's web user state is not Active.
Resource Not Available.	Displayed on a booking for a Video Conferencing template when the resource is unavailable because of a restrictive quantity.
x is not a valid date.	Displayed when a user enters bad data in a date field.
x is not a number.	Displayed when a user enters bad data in number field.
x is not a valid time.	Displayed when a user enters bad data in a time field.
You must supply a favorite name to continue.	Displayed when a user is defining favorites, but does not name the selection.
You must provide text to search.	Displayed if a user attempts to look up groups without specifying a name
You cannot remove the {0} you are tied to via external reference.	Displayed if a user attempts to remove their own group record from the selected groups on the group picker.
You cannot remove the {0} that is on the reservation you are currently editing.	Displayed if a user attempts to remove the group record assigned to the reservation they are currently editing.
{0} is required.	Displayed if a user has not completed filling out a User Defined Field that has been marked as required in the customer's Web Process template.
You must supply a location to continue.	Displayed if a user attempts to add an Override description room without a location on a Video Conferencing template.
Attendance does not meet the minimum capacity ({0}) for the location.	Displayed if a user violates the minimum capacity of a room while booking a video conference.

Alert/Error Message	Description
Attendance does not meet the maximum capacity ({0}) for the location.	Displayed if a user violates the maximum capacity of a room while booking a video conference.
{0} is required.	Billing Reference/PO Number is required.
{0} must be valid.	Billing Reference/PO Number must be valid.
Video Conference Templates require one location to be Host.	Displayed if a user attempts to submit a video conference reservation without a video conferencing host.
{0} has a minimum quantity of {1}.	Displayed when a user selects a resource that has a minimum quantity.
{0} has a maximum available quantity of {1}.	Displayed when a user selects a service that has a maximum quantity.

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