

# Virtual EMS

User's Manual

for

EMS Enterprise 6.0

EMS Campus 3.0

EMS Legal 6.0

EMS Workplace 6.0

EMS Professional 12.0





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# Preface

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Welcome to the *VEMS User's Manual*. The purpose of the *VEMS User's Manual* is to answer your questions and guide you through the procedures necessary to use the VEMS application efficiently and effectively.

## Using the manual

You will find the *VEMS User's Manual* easy to use. You can simply look up the topic that you need in the table of contents or the index. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

## Special information about the manual

The *VEMS User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.



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*If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.*

## Conventions used in the manual

The *VEMS User's Manual* uses the following conventions:

- The VEMS menu options and page options (fields, dropdown lists, toolbars, links, and available functions) are highly configurable. *All available* VEMS menu options and page options are described in detailed or referenced in this User's manual. Your EMS administrator configures your organization's implementation of VEMS to best suit your organization's business needs. In addition, some options are available only if you have a VEMS account. Therefore, the options that are discussed in this User's manual might be different than what you observe for your VEMS implementation.

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Location>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.
- Page numbering is “online friendly.” Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the index.



*Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.*

- This manual is intended for both print and online viewing.
  - If information appears in [blue](#), it is a hyperlink. Table of Contents and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

## Assumptions for the manual

The *VEMS User's Manual* assumes that:

- You are familiar with web-based applications and basic web functions and navigational elements.

## Organization of the manual

In addition to this Preface, the *VEMS User's Manual* contains the following chapters and appendices:

- [Chapter 1, “Getting Started with VEMS,” on page 9](#) details the procedures for opening and logging on to the VEMS application.
- [Chapter 2, “Browse Menu,” on page 13](#) details the options that are available on the Browse menu, including browsing for events, facilities, and/or space as well checking yourself and groups in to and out of a building for an event.
- [Chapter 3, “Reservations Menu,” on page 27](#) details the different types of room requests that can be available to you on the Reservations menu and how you complete a room or services request in VEMS.
- [Chapter 4, “My Acct Menu,” on page 61](#) details the options that are available to on the My Account menu, including modifying your user profile, setting up delegate accounts, setting default values for certain fields on the Room Request page and creating a list of favorite rooms to search when requesting a room.

# Chapter 1

## Getting Started with VEMS

---

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

This chapter covers the following topics:

- [“Logging in to and out of VEMS” on page 11.](#)

## Chapter 1

### Getting Started with VEMS

# Logging in to and out of VEMS

You can access VEMS through any standard Internet browser.

## To log in to VEMS

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



*Contact your EMS administrator if you need assistance.*

The VEMS Home page opens.

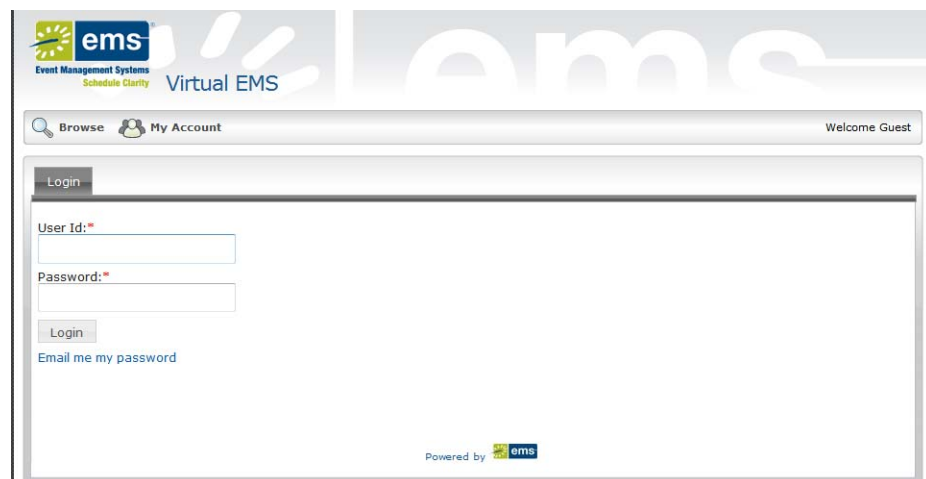
Figure 1-1: VEMS Home page



3. Under My Account, click Log In.

The VEMS Login page opens.

Figure 1-2: VEMS Login page



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



*If you do not know your User ID or password, 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.*

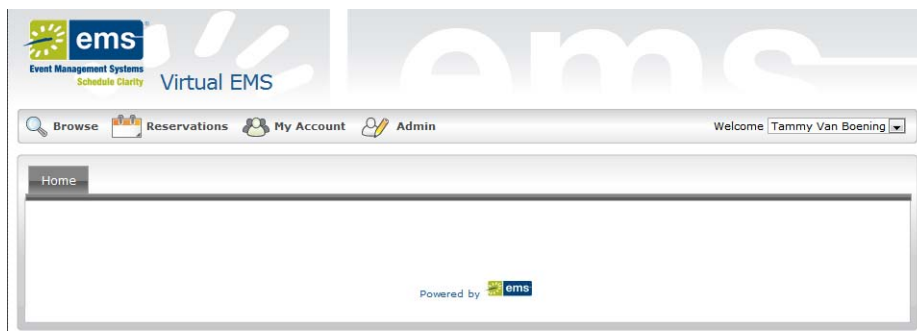
6. Click Login.

The toolbar on the VEMS Home 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 Home page, Welcome <User Name> is displayed. If you have been granted delegate access to other web users' accounts, then your user name is displayed in a dropdown list along with the names of these web users. You can assume the identity of any of these web users by picking the appropriate name in the dropdown list.



*For information about creating a delegate, see [“Creating Delegate Accounts” on page 56](#).*

Figure 1-3: VEMS Home page



## To log out of VEMS

Under My Account, click Log Out.

# Chapter 2

## Browse Menu

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

This chapter covers the following topics:

- [“Browsing for Events” on page 15.](#)
- [“Browsing for Facilities” on page 18.](#)
- [“Browsing for Space” on page 20.](#)
- [“Locating a Group” on page 22.](#)
- [“Checking In Yourself/Checking Out Yourself from a Building \(EMS Workplace\)” on page 25.](#)

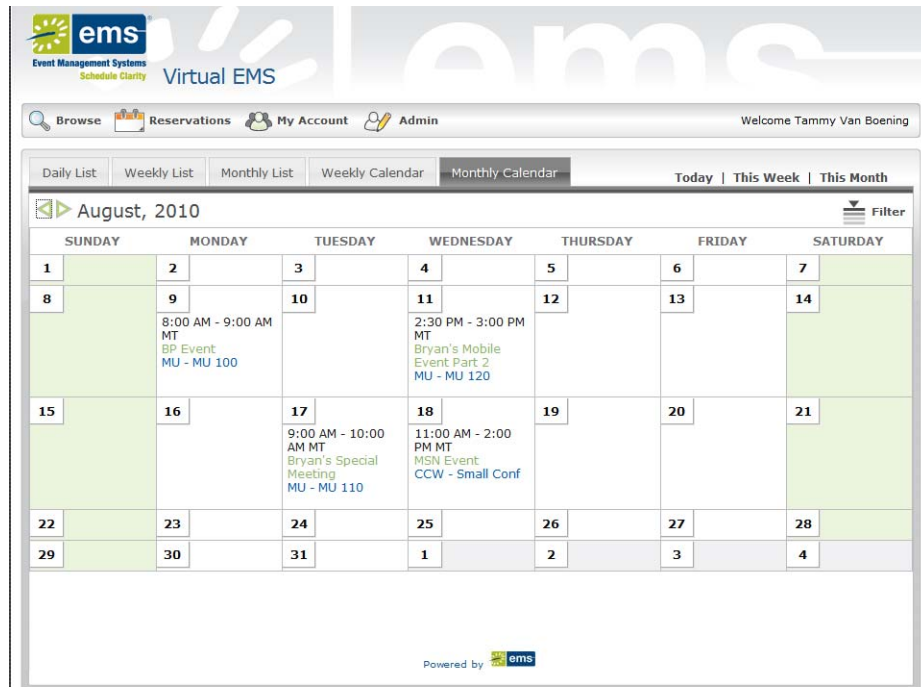
## Chapter 2

### Browse Menu

# Browsing for Events

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

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



You can do the following on the Browse Events page:

- Change the page view.

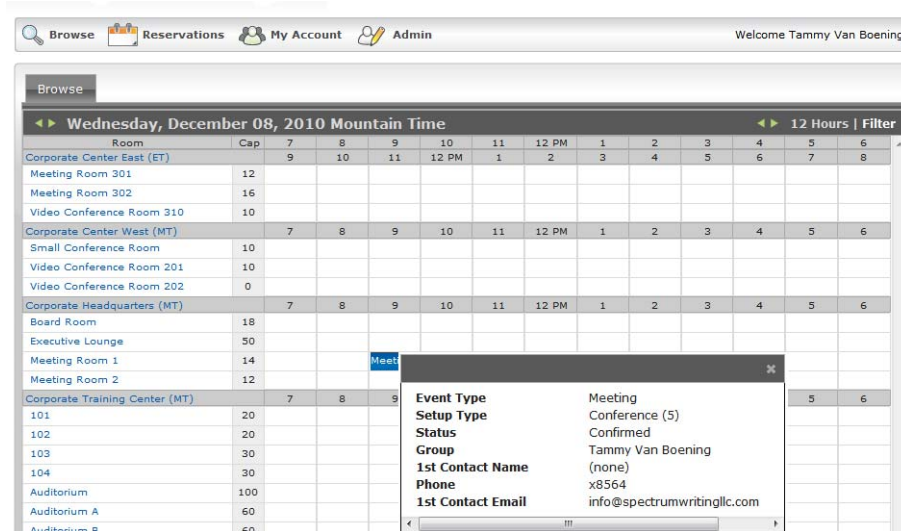
Option	Description
Daily List	Events that are scheduled for the current day's date in a list view.
Weekly List	Events that are scheduled for the current week (weeks always begin on a Sunday) in a list view.
Monthly List	Events that are scheduled for the current month in a list view.
Weekly Calendar	Events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

## Chapter 2

### Browse Menu

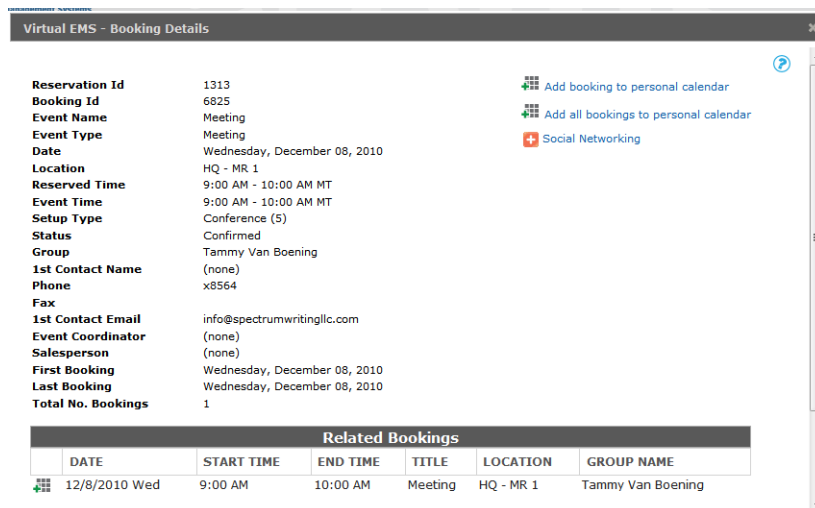
- Place your cursor over the event entry (in a Calendar view) or the event title (in a list view) to open the Event Details popup, which displays information for the event.

Figure 2-2: Event Details popup



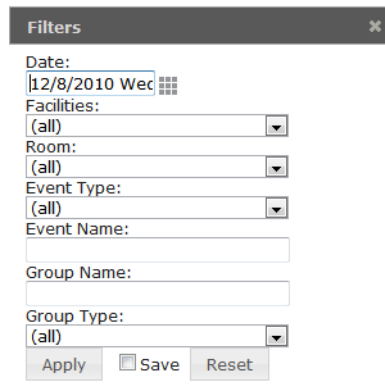
- Click the Event Name/Title to open the Booking Details popup. The popup shows reservation details and related bookings. It also contains links for adding the selected booking to your personal calendar, adding all the bookings for the reservation to your personal calendar, and adding the booking to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

Figure 2-3: Booking Details popup



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

Figure 2-4: Filters popup

A screenshot of a 'Filters' popup window. The window has a title bar with the text 'Filters' and a close button. Inside, there are several input fields and dropdown menus. The 'Date' field is set to '12/8/2010 Wed'. The 'Facilities' dropdown is set to '(all)'. The 'Room' dropdown is set to '(all)'. The 'Event Type' dropdown is set to '(all)'. There are empty text input fields for 'Event Name' and 'Group Name'. The 'Group Type' dropdown is set to '(all)'. At the bottom, there are three buttons: 'Apply', 'Save' (with a checkbox), and 'Reset'.

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

# Browsing for Facilities

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

Figure 2-5: Browse Facilities page, By Setup Type

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

Figure 2-6: Browse Facilities page, By Room

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

In either view, you can click on the Room Name to open the Location Details popup, which displays detailed information about the room—the building in which the room is found, the room details, the room setup type, and the room features.

Figure 2-7: *Location Details popup*

Virtual EMS - Location Details

Building Details

Building Code CTC

Description Corporate Training Center

Notes

Room Details Setup Types Features

Room Code Aud - A

Description Auditorium A

Room Type Auditorium

Floor Main Lobby


Size 0

Phone x4823

Setup Hours 1.00

Teardown Hours 1.00

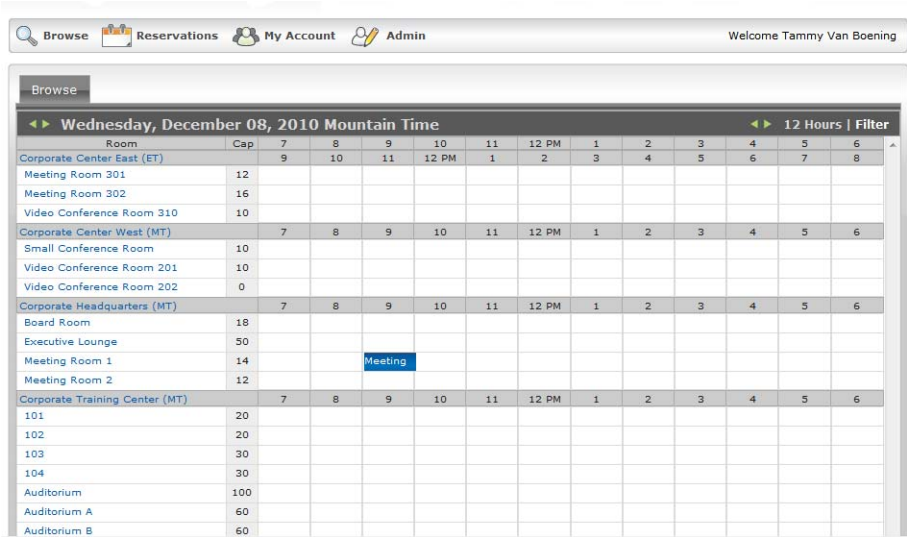
Notes

 Hollow Square

# Browsing for Space

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

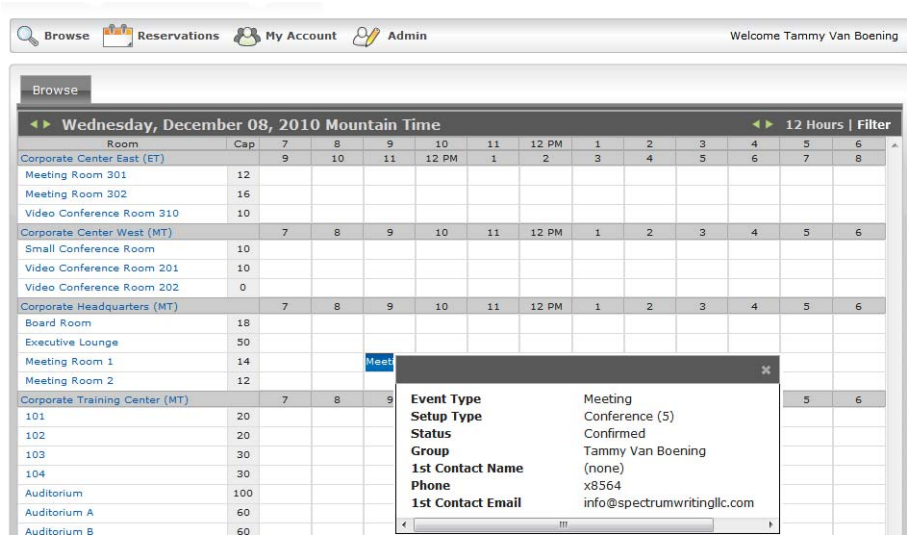
Figure 2-8: Browse Space page



You can do the following on the Browse Space page:

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

Figure 2-9: Event Details popup



- Click on the Room Name to open the Location Details popup, which displays detailed information about the room—the building in which the room is found, the room details, the room setup type, and the room features.

Figure 2-10: Location Details popup


Virtual EMS - Location Details

**Building Details**

**Building Code** CTC  
**Description** Corporate Training Center  
**Notes**

**Room Details** **Setup Types** **Features**

**Room Code** Aud - A  
**Description** Auditorium A  
**Room Type** Auditorium  
**Floor** Main Lobby  
**Size** 0  
**Phone** x4823  
**Setup Hours** 1.00  
**Teardown Hours** 1.00  
**Notes**

  
Hollow Square

# Locating a Group


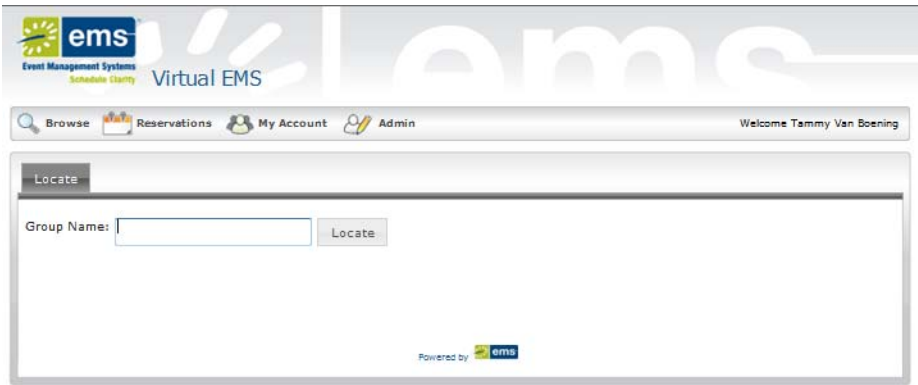
You use the functions on the Locate page to locate a group as well as all the events for the current day's date for which the group is scheduled. In EMS Workplace, the check in/check out status for a group is also displayed on this page. If the group that is displayed on the page is *you*, then you can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

Figure 2-11: Locate page



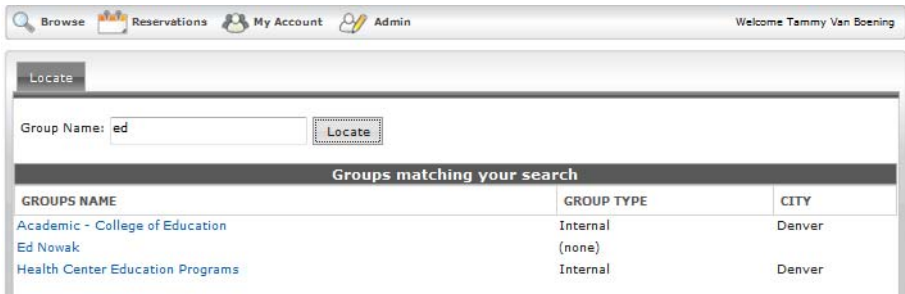
You can do the following on the Locate page:

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



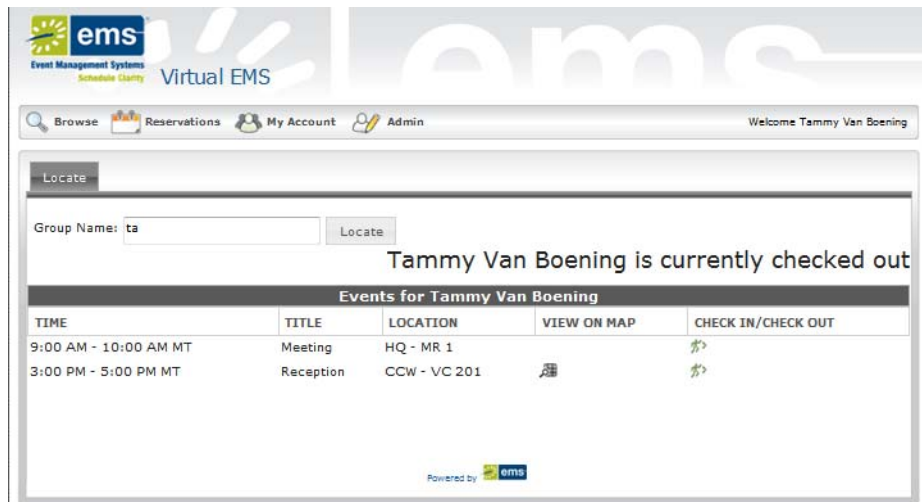
*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, if you enter “ed,” search results can include the College of **E**ducation, **E**d Smith, Health Center **E**ducation Programs, and so on.*

Figure 2-12: Locate page with search results



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

Figure 2-13: Bookings for a selected group




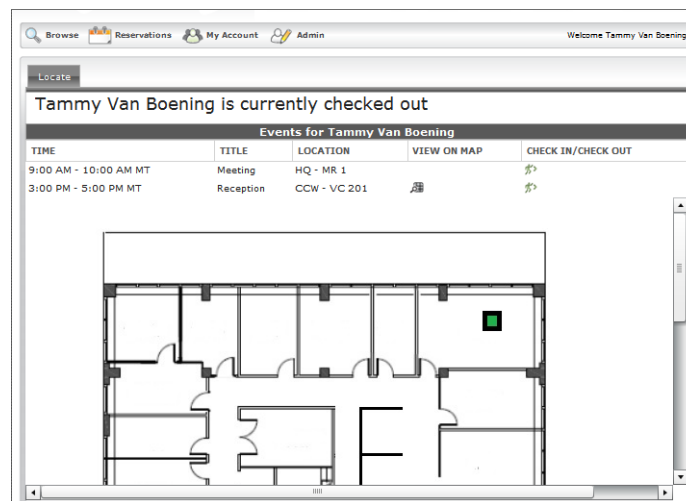


- Click the Floor Plan icon  for an event to open to open the floor plan for the event's building and view the location of the event's room on the plan.

Figure 2-14: Viewing the floor plan for an event's building




## Chapter 2

### Browse Menu

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

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




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

You can click this icon to open a floor plan for the selected building and view the location of the event's room on the plan. To open the Check In/Check Out page, under Browse, click Check In/Check Out.





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

Figure 2-15: Check In/Check Out page


Events for Tammy Van Boening				
TIME	TITLE	LOCATION	VIEW ON MAP	CHECK IN/CHECK OUT
9:00 AM - 10:00 AM MT	Meeting	HQ - MR 1		
3:00 PM - 5:00 PM MT	Reception	CCW - VC 201		

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

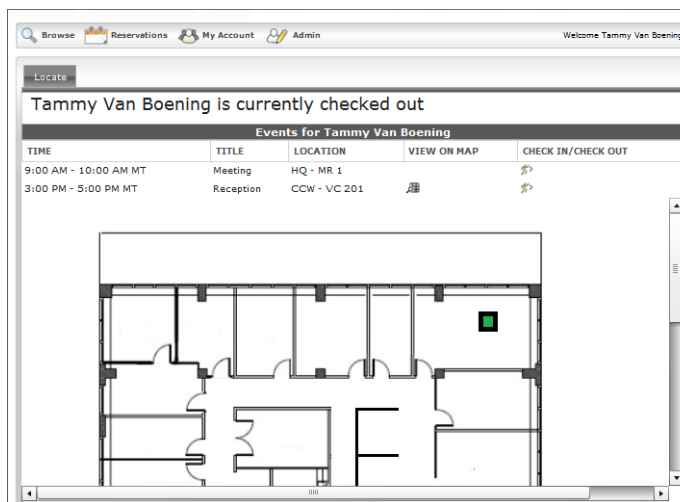
- Click the Check In icon  for an event to check yourself into the building.
- Click the Check Out icon  for an event to check yourself out of the building.

## Chapter 2

### Browse Menu

- 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.

*Figure 2-16: Viewing the floor plan for an event's building*



# Chapter 3

## Reservations Menu

---

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

This chapter covers the following topics:

- [“Overview of the Reservations Menu” on page 29.](#)
- [“Submitting a Request for a Space - Booking a Room” on page 30.](#)
- [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module” on page 36.](#)
- [“Submitting a Request for Space - Submitting an Online Request for a Room” on page 43.](#)
- [“Requesting Services Only” on page 47.](#)
- [“Viewing your Requests” on page 50.](#)
- [“The Reservation Summary Page” on page 51.](#)
- [“Making or Canceling Reservations from your Mobile Phone” on page 59.](#)

Chapter 3  
Reservations Menu

# 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 views. Rooms and services can be reserved without approval required or requested with approval required based on the rights that your organization has assigned to you.



*An Exchange/Lotus Notes integration option might be available that allows you to add attendees and view their free/busy information during the room request process. In addition, after you submit your reservation, the meeting is added automatically to your calendar and invitations are sent to your attendees. See [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module” on page 36](#)*



*Video conferencing options might also be available.*

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

Your EMS administrator configures all these request types “behind the scenes,” and the type is not explicitly displayed on the Reservations menu. Instead, 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 for viewing all the requests for space and/or services that you have submitted.

## Submitting a Request for a Space - Booking a Room

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

Figure 3-1: Room Request page, Location tab

The screenshot displays the 'Room Request' page with the 'Location' tab selected. The left sidebar contains the 'When and Where' section with fields for Date (12/8/2010 Wed), Start Time, End Time, Time zone (Mountain Time), Area, and Facilities. Below this is the 'Setup Information' section with Attendance (0) and Setup Type (no preference), followed by a 'Find Space' button. The 'Availability Filters' section includes Room Type, Floor, and Features (Built-In Sound and Video, Network Connection, View of Mountains, VTC). The main content area shows the 'Location' tab with 'Selected Locations' and a message 'No rooms currently selected'. Below this are buttons for 'List', 'Grid', and 'Floor Map'. At the bottom, there is a checkbox for 'I have read and agree to the terms and conditions' and a yellow 'Submit Reservation' button.

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

## To submit a request for space - booking a room

1. Under Reservations, click a reservation option.

The Room Request page opens.




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

2. In the When and Where (left) pane of the page, enter your date and time criteria.



*An option might be available to specify default values for some of these options. See [“Setting Default Values for Room Requests” on page 66.](#)*

3. Optionally, on the Facilities dropdown list, select a building. If needed, click the Search icon  to open a Buildings popup from which you can select multiple buildings.
4. In the Setup Type Information section, enter your attendance and setup type.
5. 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.



*Time Zone, Areas, and Floor are available only in EMS Enterprise.*

6. 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.

See [Figure 3-2 on page 32.](#)



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



*An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms” on page 68.](#)*

Figure 3-2: Room Request page, List view of search results

The screenshot shows the Virtual EMS Room Request page. The left sidebar contains filters for 'When and Where' (Date, Start/End Time, Time zone, Areas, Facilities), 'Setup Information' (Attendance, Setup Type), and 'Availability Filters' (Room Type, Floor). The main area displays a table of search results under the 'List' tab. The table has columns for SELECT, AVAILABLE, LOCATION, TIME ZONE, CAPACITY, and PRICE. It shows three results: 'CCW - Small Conf' (10 capacity), 'CCW - VC 201' (10 capacity), and 'CCW - VC 202' (0 capacity). A 'Continue' button is at the bottom right.


SELECT	AVAILABLE	LOCATION	TIME ZONE	CAPACITY	PRICE
<input type="checkbox"/>	1/1	CCW - Small Conf	MT	10	
<input type="checkbox"/>	1/1	CCW - VC 201	MT	10	
<input type="checkbox"/>	1/1	CCW - VC 202	MT	0	

7. Optionally, click the name of the room (location) in either the list view or the grid view to open the Location Details popup, which displays details and images for the building in which the room is found, and various room details including images, setup types/features.

Figure 3-3: Location Details popup

The screenshot shows the Virtual EMS Location Details popup. It has two tabs: 'Building Details' and 'Room Details'. The 'Building Details' tab is active, showing 'Building Code: CTC', 'Description: Corporate Training Center', and 'Notes'. The 'Room Details' tab is also visible, showing 'Room Code: Aud - A', 'Description: Auditorium A', 'Room Type: Auditorium', 'Floor: Main Lobby', 'Size: 0', 'Phone: x4823', 'Setup Hours: 1.00', and 'Teardown Hours: 1.00'. There is a small image of a building and a link to 'Hollow Square'.

Building Details	Room Details
Building Code: CTC	Room Code: Aud - A
Description: Corporate Training Center	Description: Auditorium A
Notes:	Room Type: Auditorium
	Floor: Main Lobby
	Size: 0
	Phone: x4823
	Setup Hours: 1.00
	Teardown Hours: 1.00
	Notes:









8. 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.



*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.*

Figure 3-4: Selected room displayed on Location tab

Location		Details						
Selected Locations								
	DATE	HOLIDAYS	START 	END	LOCATION	STATUS	SETUP COUNT	CONFLICT
	12/9/2010 Thu		5:00 PM	6:30 PM	CCW - Small Conf	Reserve	25	
List		Grid		Floor Map				
Availability								
SELECT	AVAILABLE	LOCATION			TIME ZONE	CAPACITY	PRICE	
Reserve								
	1/1	CCE - MR 301			ET	12		
	1/1	CCE - MR 302			ET	16		
	1/1	CCW - Small Conf			MT	10		
	1/1	HQ - MR 1			MT	14		
	1/1	HQ - MR 2			MT	12		

9. Open the Details tab.

Figure 3-5: Room Request page, Details tab

The screenshot shows the 'Virtual EMS' interface for a 'Training Center Request Form'. The 'Details' tab is active, showing various input fields for event information. The form is organized into several sections: 'When and Where' (Date, Start/End Time, Time zone, Facilities, Room), 'Event Details' (Event Name, Event Type), 'Group Details' (Group, 1st Contact, Phone, Fax, Email), 'Setup Information' (Attendance, Setup Type), 'Audio Visual' (Display, Computer, Phone, Sound), and 'Setup Notes'. A 'Check Availability' button is located below the 'Setup Information' section. At the bottom, there is a checkbox for 'I have read and agree to the terms and conditions' and a 'Submit Reservation' button. The page is powered by 'ems'.

ems  
Event Management Systems  
Schedule Clarity  
Virtual EMS

Browse Reservations My Account Admin Welcome Tammy Van Boening

Training Center Request Form

Details Availability

**When and Where**

Date: 12/28/2010 Tue Recurrence

Start Time: End Time:

Time zone: Mountain Time

Facilities: (no preference)

Room: (no preference)

**Event Details**

Event Name: Training Event Type: Training

**Group Details**

Group:

1st Contact: Tammy Van Boening

Phone: 303-840-1755 Fax:

Email: info@spectrumwritingllc.com

**Setup Information**

Attendance: 0

Setup Type: (no preference)

Check Availability

**Audio Visual**

Display

Computer Dell Laptop

Phone

Sound

**Setup Notes**


I have read and agree to the terms and conditions View


Submit Reservation

Powered by ems

10. 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.
- You might be required to answer additional questions when booking the room. These questions are displayed in an Other Information section.

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

11. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 51.](#)



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

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

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

Figure 3-6: Room Request page, Location tab

The screenshot shows the 'Room Request' page in the 'Location' tab. The left pane, 'When and Where', contains fields for 'Add to Calendar/Send Invitations', 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Eastern Time), 'Areas' (all), and 'Facilities' (all). Below this is the 'Setup Information' section with 'Attendance' (5), 'Setup Type' (Conference), and a 'Find Space' button. The 'Availability Filters' section includes 'Room Type' (all), 'Floor' (all), and 'Features' (Data Projector, Polycom, VC Equipment). The main area shows a calendar for Wednesday, December 15, 2010, with a grid of rooms. A table below the calendar lists attendees:

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

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

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

1. Under Reservations, click a reservation option.

The Room Request page opens.




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

2. In the When and Where (left) pane of the page, enter your date and time criteria.



*An option might be available to specify default values for some of these options. See [“Setting Default Values for Room Requests” on page 66.](#)*

3. Optionally, on the Facilities dropdown list, select a building. If needed, click the Search icon  to open a Buildings popup from which you can select multiple buildings.
4. In the Setup Type Information section, enter your attendance and setup type.
5. 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.



*Time Zone, Areas, and Floor are available only in EMS Enterprise.*

6. 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.

See [Figure 3-2 on page 32.](#)



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



*An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms” on page 68.](#)*

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

The screenshot shows the Virtual EMS interface. At the top, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is on the right. The main section is titled 'Conference Room Request'. On the left, there are filters for 'When and Where' (Date, Start/End Time, Time zone, Areas, Facilities) and 'Setup Information' (Attendance, Setup Type). Below these are 'Availability Filters' for Room Type and Floor. The right side shows 'Selected Locations' with a 'List' tab selected. A table displays search results with columns: SELECT, AVAILABLE, LOCATION, TIME ZONE, CAPACITY, and PRICE. The table lists three items: 'CCW - Small Conf' (10 capacity), 'CCW - VC 201' (10 capacity), and 'CCW - VC 202' (0 capacity). A 'Continue' button is at the bottom right.


SELECT	AVAILABLE	LOCATION	TIME ZONE	CAPACITY	PRICE
<input type="checkbox"/>	1/1	CCW - Small Conf	MT	10	
<input type="checkbox"/>	1/1	CCW - VC 201	MT	10	
<input type="checkbox"/>	1/1	CCW - VC 202	MT	0	

7. Optionally, click the name of the room (location) in either the list view or the grid view to open the Location Details popup, which displays details and images for the building in which the room is found, and various room details including images, setup types/features.

Figure 3-8: Location Details popup

The screenshot shows a 'Virtual EMS - Location Details' popup window. It has two tabs: 'Building Details' and 'Room Details'. The 'Building Details' tab is active, showing 'Building Code: CTC', 'Description: Corporate Training Center', and 'Notes'. The 'Room Details' tab is also visible, showing 'Room Code: Aud - A', 'Description: Auditorium A', 'Room Type: Auditorium', 'Floor: Main Lobby', 'Size: 0', 'Phone: x4823', 'Setup Hours: 1.00', and 'Teardown Hours: 1.00'. There is a small image of a building and a link 'Hollow Square' below it.

Room Code	Setup Types	Features
Aud - A		
Auditorium A		
Auditorium		
Main Lobby		
0		
x4823		
1.00		
1.00		

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


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



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



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

9. Click the Add icon  next to each attendee that is to be invited to the meeting.
10. Click Find Space.

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


Figure 3-9: Room Request page, Grid view of search results

The screenshot displays the 'Book a Meeting Room' interface. On the left, the 'When and Where' section is active, showing a date of 12/15/2010, start time of 8:00 AM, and end time of 10:00 AM. Below this, the 'Setup Information' section shows an attendance of 5 and a 'Find Space' button. The 'Availability Filters' section at the bottom allows filtering by room type, floor, and features like 'Data Projector' and 'Polycom'. The main content area is titled 'Selected Locations' and shows a calendar grid for Wednesday, December 15, 2010. The grid lists attendees and their availability, with blue bars indicating booked time slots. Below the grid, a table shows room details for Denver (MT), including room numbers 02.West and 02.East, their capacities, and booked time slots.

## Chapter 3

### Reservations Menu

11. Do one of the following to select a room

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

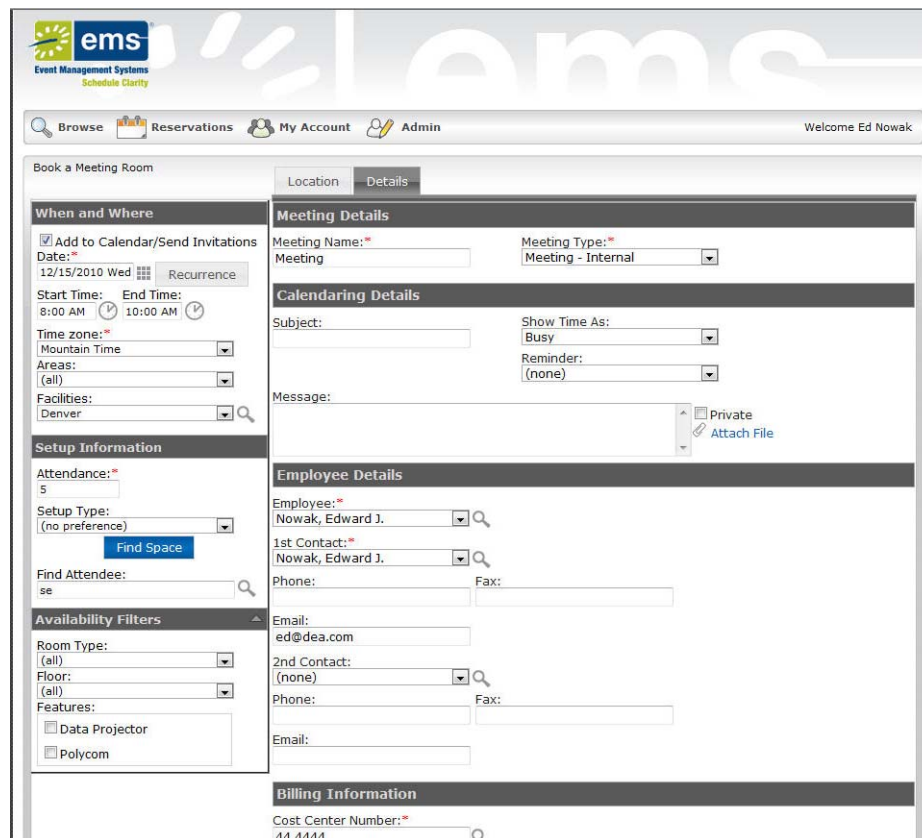
The selected location is displayed at the top of the Location tab.



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

12. Open the Details tab opens.

Figure 3-10: Room Request page, Details tab





The screenshot shows the 'Book a Meeting Room' page with the 'Details' tab selected. The page is divided into several sections:

- When and Where:** Includes fields for 'Add to Calendar/Send Invitations', 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Mountain Time), 'Areas' ((all)), and 'Facilities' (Denver).
- Setup Information:** Includes 'Attendance' (5), 'Setup Type' ((no preference)), and a 'Find Space' button.
- Availability Filters:** Includes 'Room Type' ((all)), 'Floor' ((all)), and 'Features' (Data Projector, Polycom).
- Meeting Details:** Includes 'Meeting Name' (Meeting), 'Meeting Type' (Meeting - Internal), and 'Subject'.
- Calendaring Details:** Includes 'Show Time As' (Busy), 'Reminder' ((none)), and a 'Message' field.
- Employee Details:** Includes 'Employee' (Nowak, Edward J.), '1st Contact' (Nowak, Edward J.), 'Phone', 'Fax', 'Email' (ed@dea.com), '2nd Contact' ((none)), and another 'Phone', 'Fax', 'Email' set.
- Billing Information:** Includes 'Cost Center Number' (44.4444).

13. 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/Employee 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.
- You might be required to answer additional questions when booking the room. These questions are displayed in an Other Information section.
- You might have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to view the terms and conditions before you accept them.

14. Click Submit Reservation.

- The appointment is added to your personal calendar and meeting invitations are automatically sent to the meeting attendees. The appointment form contains two embedded links (one for the organizer and one for an attendee) to access the reservation in VEMS. See [Figure 3-11 on page 42](#).



*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 EMS.*

- The Reservation Summary page opens. See [“The Reservation Summary Page” on page 51](#).

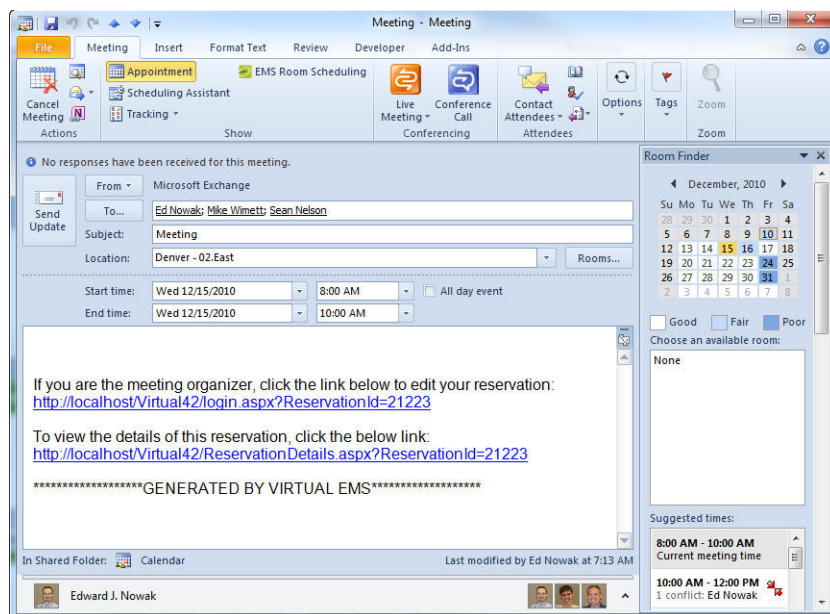


*For a reservation containing multiple bookings (a recurring meeting), resolve any room conflicts using the booking tools outlined on the Reservation Summary page. See [“The Reservation Summary Page” on page 51](#).*

## Chapter 3

### Reservations Menu

Figure 3-11: Example of an automatically generated email



## Submitting a Request for Space - Submitting an Online Request for a Room

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

Figure 3-12: Room Request Form page, Details tab

The screenshot shows the 'Virtual EMS' web interface. At the top, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin' links, and a welcome message for 'Tammy Van Boening'. The main content area is titled 'Training Center Request Form' and has two tabs: 'Details' (selected) and 'Availability'. The 'Details' tab is divided into several sections: 'When and Where' (with fields for Date, Start/End Time, Time zone, Facilities, and Room), 'Setup Information' (with fields for Attendance and Setup Type), 'Event Details' (with fields for Event Name and Event Type), 'Group Details' (with fields for Group, 1st Contact, Phone, Fax, and Email), 'Other Information' (with a dropdown for 'Are the people attending this event Internal or External?'), 'Audio Visual' (with checkboxes for Display, Computer, Phone, and Sound), and 'Setup Notes' (a text area). At the bottom, there's a checkbox for 'I have read and agree to the terms and conditions' and a 'Submit Reservation' button.

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 will be available, or if you must request another room. You enter information for the event on the Details tab.

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

1. Under Reservations, click a reservation option.

The Room Request page opens.



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

2. In the When and Where (left) pane of the page, enter your date and time criteria.



*Time Zone is available only in EMS Enterprise.*



*An option might be available to specify default values for some of these options. See [“Setting Default Values for Room Requests” on page 66.](#)*

3. In the Setup Type Information section, enter your attendance and setup type.
4. Click Check Availability.

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 will be available, or if you must request another room.

Figure 3-13: Request Room Form page, Availability tab

The screenshot shows the 'Request Room Form' page with the 'Availability' tab selected. The left pane contains search criteria, and the right pane displays a table of available rooms.

Availability				
Available	Location	Time zone	Capacity	Price
Request				
1/1	CTC - 101	MT	20	
1/1	CTC - 102	MT	20	
1/1	CTC - 103	MT	30	
1/1	CTC - 104	MT	30	
1/1	CTC - Auditorium	MT	100	
1/1	CTC - Aud - A	MT	60	
1/1	CTC - Aud - B	MT	60	

Search Criteria (Left Pane):

- Date: 12/9/2010 Thu
- Start Time: 5:00 PM
- End Time: 6:00 PM
- Time zone: Mountain Time
- Facilities: Corporate Training Center
- Room: (no preference)
- Attendance: 25
- Setup Type: (no preference)

Buttons: Check Availability, I have read and agree to the terms and conditions View

- Optionally, click the name of the room (location) to open the Location Details popup, which displays details and images for the building in which the room is found, and various room details including images, setup types/capacities and features.

Figure 3-14: Location Details popup

- Open the Details tab.

Figure 3-15: Room Request Form page, Details tab

## Chapter 3

### Reservations Menu

#### 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 be required to answer additional information when booking the room. These questions are displayed in an Other Information section.
- You might have the option of booking resources and/or services for the event.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to view the terms and conditions before you accept them.

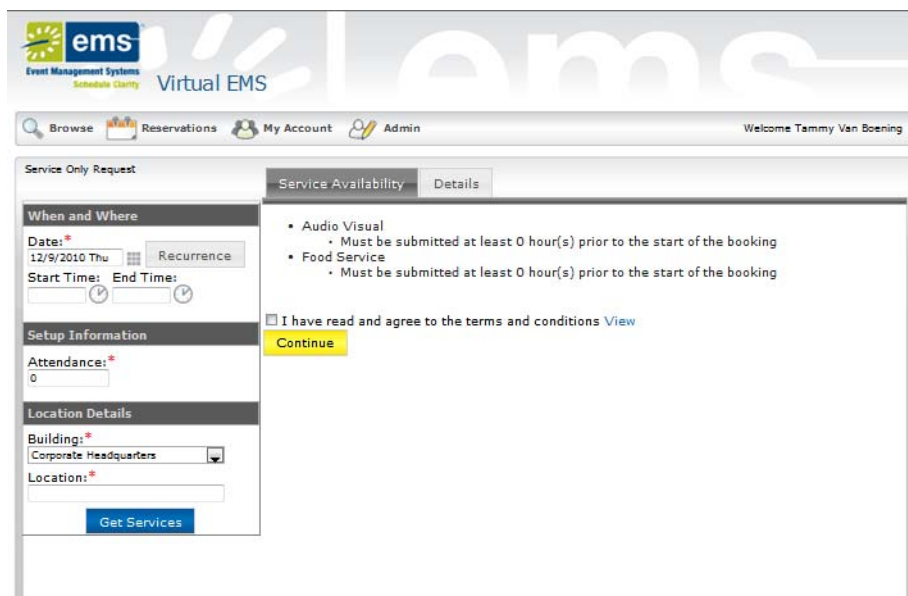
#### 8. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 51.](#)

## Requesting Services Only

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

Figure 3-16: Services Only Request page, Service Availability tab



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

## To request services only

1. Under Reservations, click a reservation option.

The Services Only Request page opens.



---

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

2. In the When and Where (left) pane of the page, enter your date and time criteria.



---

*Time Zone is available only in EMS Enterprise.*



An option might be available to specify default values for some of these options.  
See [“Setting Default Values for Room Requests” on page 66.](#)

3. In the Setup Type Information section, enter your attendance.
4. On the Buildings dropdown list, select the building, and then in the Location field, enter the location (room) in the building for which you are requesting services.
5. Click Get Services.

The Details tab opens.

Figure 3-17: Services Only Request page, Details tab



The screenshot shows the 'Services Only Request' page in the EMS Virtual EMS system. The page is divided into several sections for data entry:

- When and Where:** Includes fields for Date (12/9/2010 Thu), Start Time (5:00 PM), End Time (6:00 PM), and a Recurrence button.
- Setup Information:** Includes an Attendance field set to 10.
- Location Details:** Includes a Building dropdown (Corporate Headquarters) and a Location field (Dr. Wilson's Office). A 'Get Services' button is located below these fields.
- Event Details:** Includes Event Name (Service Request) and Event Type (Service Request).
- Group Details:** Includes Group, 1st Contact, Phone, Fax, and Email fields.
- Other Information:** Includes a checkbox for 'Has this request received management approval?'.
- Audio Visual:** Includes a 'Display' checkbox and a 'Flip Chart' checkbox.
- Food Service:** Includes a 'Service Type' dropdown (Standard), an 'Estimated Count' field, and checkboxes for Beverage (Coffee Service, Soda, Water) and Breaks (PM Break). It also includes a text area for food allergies and a checkbox for sending a printed menu.
- Billing Information:** Includes Billing Reference and PO Number fields, a checkbox for agreeing to terms and conditions, and a 'Submit Reservation' button.

The page footer indicates it is 'Powered by EMS'.

6. Enter the information for the event.

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

- Required fields are marked with a red asterisk (\*). At minimum, you must enter the event name, the event type, and the group details.
- Some fields might in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  , then you can search for a group/contact record for the event.
- You might be required to answer additional information when booking the room. These questions are displayed in an Other Information section.
- One or more resource/services sections will be displayed, depending on the number and type of services that were available to you. You must specify the information for the *appropriate* services for the booking. You do not have to specify information for a resource/service if you do not want to request the service for the booking.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  , 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 view the terms and conditions before you accept them.

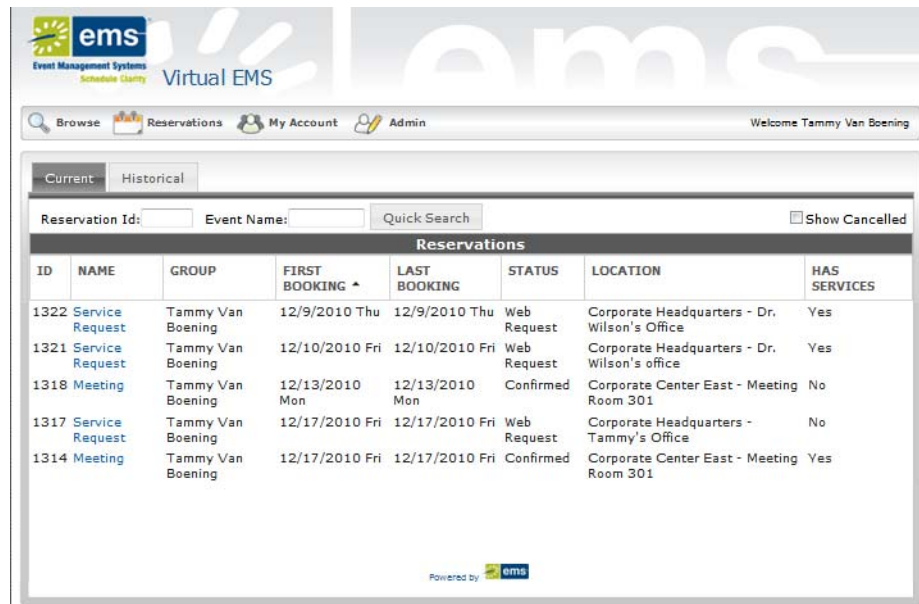
7. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 51.](#)

## Viewing your Requests

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

Figure 3-18: Requests page, Current tab



ID	NAME	GROUP	FIRST BOOKING	LAST BOOKING	STATUS	LOCATION	HAS SERVICES
1322	Service Request	Tammy Van Boening	12/9/2010 Thu	12/9/2010 Thu	Web Request	Corporate Headquarters - Dr. Wilson's Office	Yes
1321	Service Request	Tammy Van Boening	12/10/2010 Fri	12/10/2010 Fri	Web Request	Corporate Headquarters - Dr. Wilson's office	Yes
1318	Meeting	Tammy Van Boening	12/13/2010 Mon	12/13/2010 Mon	Confirmed	Corporate Center East - Meeting Room 301	No
1317	Service Request	Tammy Van Boening	12/17/2010 Fri	12/17/2010 Fri	Web Request	Corporate Headquarters - Tammy's Office	No
1314	Meeting	Tammy Van Boening	12/17/2010 Fri	12/17/2010 Fri	Confirmed	Corporate Center East - Meeting Room 301	Yes

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

- To search for a reservation, enter a reservation ID in the Reservation Id field and/or a search string in the Event Name field, and then click Quick Search.



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

- To view all requests that you have ever made, regardless of date, open the Historical tab.
- To open a selected reservation for viewing and/or editing on the Reservation Summary page, click the name of the reservation. See [“The Reservation Summary Page” on page 51.](#)

## The Reservation Summary Page

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

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

Event Management Systems  
Schedule Query Virtual EMS





Browse Reservations My Account Admin Welcome Tammy Van Boening


Reservation Details Additional Information Back to My Requests

Reservation Id 1314  
Event Name Meeting  
Event Type Meeting  
Billing Reference  
PO Number  
Group Name Tammy Van Boening  
1st Contact Name (none)  
Phone x8564  
2nd Contact Name  
Phone

Edit Reservation  
Add Booking  
Cancel Services  
Cancel Bookings  
Cancel All Bookings  
View Reservation Summary  
Add booking to personal calendar  
Booking Tools  
Edit Additional Information

All Current Historical

Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
 	 	12/17/2010 Fri	11:00 AM - 12:00 PM ET	Meeting	CCE - MR 301	Confirmed	Conference (5)

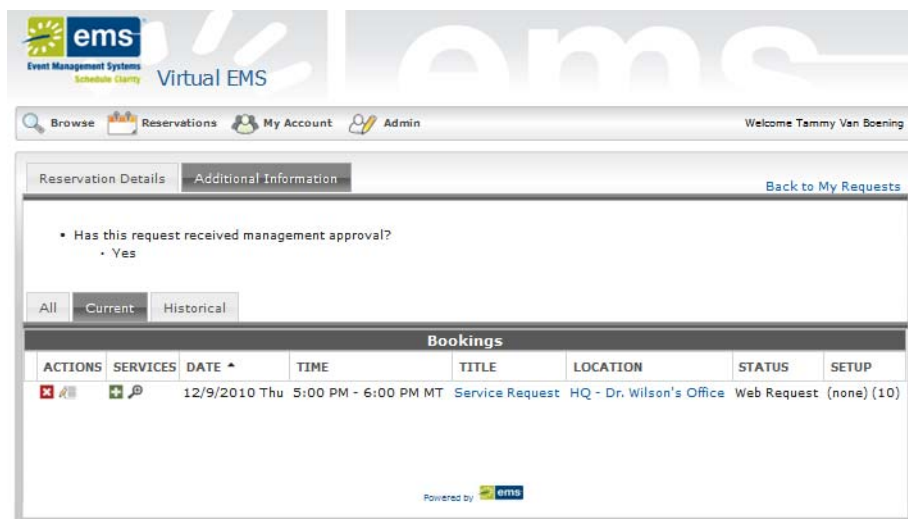
Powered by 

## Chapter 3

### Reservations Menu

The Reservation Details tab displays a detailed summary for the selected reservation—the Reservation ID, the Event Name, the Event Type, and so on. All the *current* bookings, which are bookings with a date greater than or equal to the current day's date, are displayed on the [Current tab](#) for the reservation. If you answered any additional questions (required or optional) for the reservation, then these questions and answers are displayed on the Additional Information tab.

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



The following links are displayed on the Reservation Details tab. Click on the link to carry out the indicated action:

- Edit Reservation—Update event and/or group details.
- Manage Attendees—Add or remove attendees. (Available only if using the Plan A Meeting module.)
- Add Booking—Add a booking to the reservation. See [“Submitting a Request for a Space - Booking a Room” on page 30](#).
- Cancel Services—Cancel selected services for the reservation.
- Cancel Bookings—Cancel selected bookings within the reservation.
- Cancel All Bookings—Cancel all bookings within the reservation.
- 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. See [Figure 3-21 on page 53](#).

Figure 3-21: Viewing a reservation summary

ems Event Management Systems Schedule Clarity Virtual EMS

Browse Reservations My Account Admin Welcome Tammy Van Boening

View Reservation Summary Back To Reservation Summary

Email Options ☐

Detail Summary Mobile Friendly

Scheduling Office  
3990 E. Arapahoe  
Denver CO 80126  
303-771-0110 / 303-796-7429

Confirmation

Group	Reservation 1318
Tammy Van Boening	Event Name: Meeting Phone: x8564 Event Type: Meeting Status: Confirmed

BOOKINGS / DETAILS	QUANTITY	PRICE	AMOUNT
<b>Monday, December 13, 2010</b>			
10:00 AM - 11:00 AM Meeting (Confirmed) CCE Meeting Room 301			
Reserved: 9:30 AM - 11:00 AM			
Subtotal			
Grand Total			\$0.00

<http://localhost/Virtual42/Login.aspx?data=QHB4fHldYBs4iClvvg8thMEX0Uibpf>

Powered by ems

- 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) in the reservation.
- Edit Additional Information—Provides the option of modifying your answers to any questions for the reservation.




## Current tab

All the *current* bookings (bookings with a date greater than or equal to the current day's date) for the selected reservation are displayed on the Current tab of the Reservation Summary page. You can also carry out actions for the reservation from the Current tab.

Figure 3-22: Reservation Summary page, Current tab




Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
 		12/17/2010 Fri	11:00 AM - 12:00 PM ET	Meeting	CCE - MR 301	Confirmed	Conference (5)

- To cancel a booking, click the Cancel icon  next to it.
- To edit a booking, click the Edit icon  next to it. See [“To edit a booking”](#) below.
- To add or edit services (attendees/visitors, setup notes, resources with service orders and/or resources w/out service orders) for a booking, click the Add icon  next to it. See [“To add services for a booking”](#) on page 55.



Depending on the category that you select (Attendees, Setup Notes, Resources with Service Orders, or Resources w/out Service Orders), you might have to supply additional information such as the start and end times, the estimated count, and so on, and you might also have to answer service-specific questions.

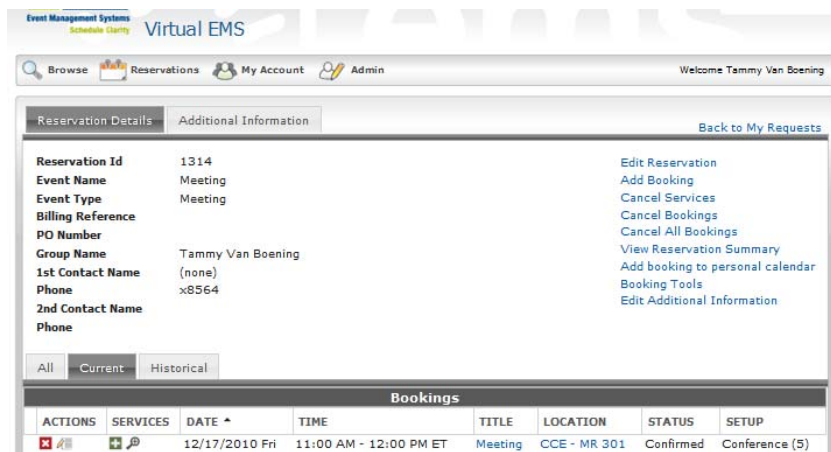
- To view services for a booking, click the View icon  next to it.

## To edit a booking

1. Under Reservations, click View My Requests to open the Reservation Summary page.
2. Select the reservation request for which you are editing one or bookings.




The Reservations Details tab on the Reservation Summary page displays summary information for the selected reservation and all its bookings.


Figure 3-23: Reservation Summary page, Reservation Details tab



Reservation Details		Additional Information	
Reservation Id	1314	Edit Reservation	
Event Name	Meeting	Add Booking	
Event Type	Meeting	Cancel Services	
Billing Reference		Cancel Bookings	
PO Number		Cancel All Bookings	
Group Name	Tammy Van Boening	View Reservation Summary	
1st Contact Name	(none)	Add booking to personal calendar	
Phone	x8564	Booking Tools	
2nd Contact Name		Edit Additional Information	
Phone			

Bookings							
ACTIONS	SERVICES	DATE ^	TIME	TITLE	LOCATION	STATUS	SETUP
 		12/17/2010 Fri	11:00 AM - 12:00 PM ET	Meeting	CCE - MR 301	Confirmed	Conference (5)

- Click the Edit icon  next to the booking that is to be edited.

A Request page opens.



*The Request page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.*

- Edit the information for the booking as needed.



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

- At the bottom of the Room Request page, or Room Request Form page, click Update Booking.

A message opens indicating that the booking was successfully updated.

- Click OK.

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




## To add services for a booking

- Under Reservations, click View My Requests to open the Reservation Summary page.
- Select the reservation request for which you are editing one or more bookings.

The Reservations Details tab on the Reservation Summary page displays summary information for the selected reservation and all its bookings.


Figure 3-24: Reservation Summary page, Reservation Details tab

The screenshot shows the Virtual EMS interface. At the top, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is on the right. Below the navigation bar, there are two tabs: 'Reservation Details' (selected) and 'Additional Information'. A 'Back to My Requests' link is in the top right of the details section. The details section contains a list of reservation information: Reservation Id (1314), Event Name (Meeting), Event Type (Meeting), Billing Reference, PO Number, Group Name (Tammy Van Boening), 1st Contact Name (none), Phone (x8564), and 2nd Contact Name. To the right of this list are several links: Edit Reservation, Add Booking, Cancel Services, Cancel Bookings, Cancel All Bookings, View Reservation Summary, Add booking to personal calendar, Booking Tools, and Edit Additional Information. Below the details section are three buttons: 'All', 'Current' (selected), and 'Historical'. At the bottom, there's a 'Bookings' table with columns: ACTIONS, SERVICES, DATE, TIME, TITLE, LOCATION, STATUS, and SETUP. The table contains one row for a booking on 12/17/2010 Fri from 11:00 AM to 12:00 PM ET, titled 'Meeting' at 'CCE - MR 301', with status 'Confirmed' and setup 'Conference (5)'.

ACTIONS	SERVICES	DATE	TIME	TITLE	LOCATION	STATUS	SETUP
 		12/17/2010 Fri	11:00 AM - 12:00 PM ET	Meeting	CCE - MR 301	Confirmed	Conference (5)

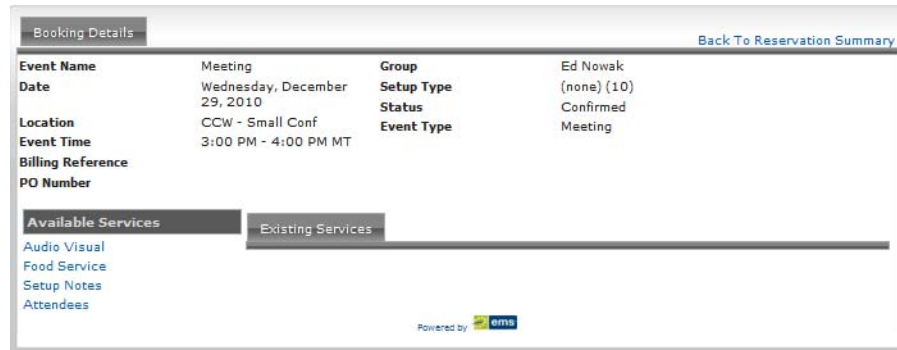
## Chapter 3

### Reservations Menu

3. Click the Add icon  next to the booking to which you are adding services.

The Booking Details tab opens. This tab displays not only summary information for the booking (event name, event date, location, and so on), but also, the services that are available for adding to the booking (Available Services tab) and the services that have already been added to the booking (Existing Services tab).

Figure 3-25: Booking Details tab



The screenshot shows the 'Booking Details' tab with the following information:

Event Name	Meeting	Group	Ed Nowak
Date	Wednesday, December 29, 2010	Setup Type	(none) (10)
Location	CCW - Small Conf	Status	Confirmed
Event Time	3:00 PM - 4:00 PM MT	Event Type	Meeting
Billing Reference			
PO Number			

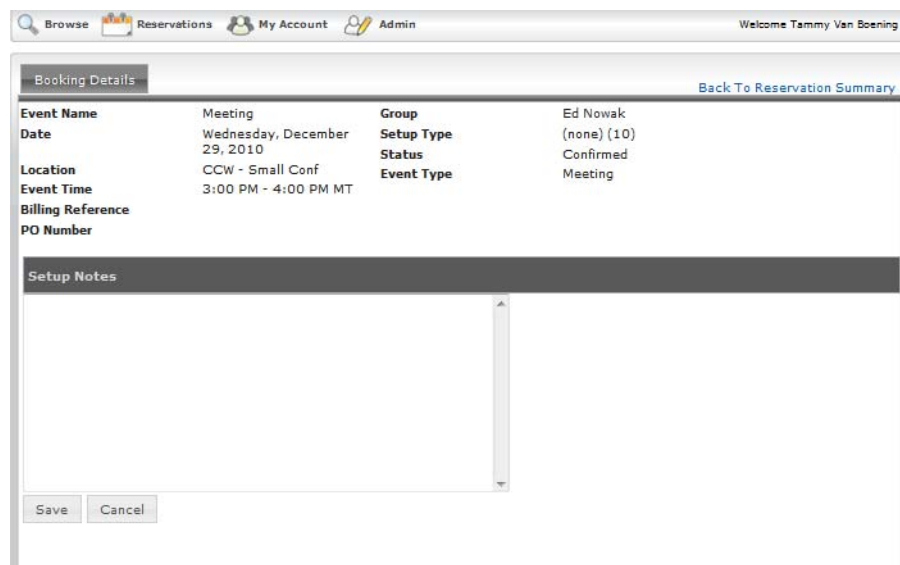
Below the booking details are two tabs: 'Available Services' and 'Existing Services'. The 'Available Services' tab is active and shows a list of services: Audio Visual, Food Service, Setup Notes, and Attendees. The 'Existing Services' tab is also visible but empty. At the bottom right, it says 'Powered by ems'.

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

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

- [Figure 3-26](#) below.
- [Figure 3-27](#) on page 57.
- [Figure 3-28](#) on page 57.
- [Figure 3-29](#) on page 58.

Figure 3-26: Adding setup notes



The screenshot shows the 'Booking Details' tab with the 'Setup Notes' sub-tab active. The sub-tab contains a large text area for adding notes. At the bottom of the sub-tab are 'Save' and 'Cancel' buttons. The booking details from the previous screenshot are still visible at the top.

Figure 3-27: Adding attendees

**Booking Details** [Back To Reservation Summary](#)

<b>Event Name</b>	Meeting	<b>Group</b>	Ed Nowak
<b>Date</b>	Wednesday, December 29, 2010	<b>Setup Type</b>	(none) (10)
<b>Location</b>	CCW - Small Conf	<b>Status</b>	Confirmed
<b>Event Time</b>	3:00 PM - 4:00 PM MT	<b>Event Type</b>	Meeting
<b>Billing Reference</b>			
<b>PO Number</b>			

**Attendees**

**Existing Attendees**

No Attendees

**Name:** \*

**Company Name:**

**Email:**

**Phone:**

**Notes:**

☐ Visitor

**Save** **Cancel**

Figure 3-28: Adding audio visual services (resource without service order)

**Booking Details** [Back To Reservation Summary](#)

<b>Event Name</b>	Meeting	<b>Group</b>	Ed Nowak
<b>Date</b>	Wednesday, December 29, 2010	<b>Setup Type</b>	(none) (10)
<b>Location</b>	CCW - Small Conf	<b>Status</b>	Confirmed
<b>Event Time</b>	3:00 PM - 4:00 PM MT	<b>Event Type</b>	Meeting
<b>Billing Reference</b>			
<b>PO Number</b>			

**Audio Visual**

☐ **Display**

- ☐ 30" LCD TV
- ☐ 80" Diagonal Screen
- ☐ Data Projector
- ☐ Flip Chart
- ☐ Overhead Projector (3M)
- ☐ TV/DVD/VCR ( 27" Combo)

☐ **Computer**

- ☐ Dell Laptop

☐ **Phone**

- ☐ Conference Phone
- ☐ Two-Way Radio (Motorola Talkabout)

☐ **Sound**

- ☐ 15" Speaker
- ☐ Handheld Microphone
- ☐ Mixer (10 channel console)
- ☐ Portable Sound System

**Save** **Cancel**

Figure 3-29: Adding catering (food) services (resource with service order)

The screenshot shows a web application interface for managing reservations. At the top, there's a navigation bar with links for 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is on the right. The main section is titled 'Booking Details' and contains a table with event information:

Event Name	Meeting	Group	Ed Nowak
Date	Wednesday, December 29, 2010	Setup Type	(none) (10)
Location	CCW - Small Conf	Status	Confirmed
Event Time	3:00 PM - 4:00 PM MT	Event Type	Meeting
Billing Reference			
PO Number			

Below the table, there's a 'Test' section and a 'Food Service' section. The 'Food Service' section has a 'Terms and Conditions' link. It includes fields for 'Start Time' (3:00 PM), 'End Time' (4:00 PM), 'Service Type' (Standard), and 'Estimated Count' (10). There are several checkboxes for different food services:

- ☐ (none)
- ☐ Catered Breakfast
- ☐ Lunch
- ☐ Box Lunch
- ☐ Dinner
- ☐ Dinner Option #1
- ☐ Dinner Option #2
- ☐ Entree
- ☐ Grilled T-Bone w/Smoked Blue Corn Chutney
- ☐ Dessert
- ☐ Finger Cakes (Assorted Variety, Serves 8)
- ☐ Key Lime Pie (Slice)
- ☐ Beverage
- ☐ Coffee/Tea Kiosk (Mobile)
- ☐ Coffee Service (Serves 10)
- ☐ Hosted Bar
- ☐ Soda (Assorted Variety)
- ☐ Water Service
- ☐ Breaks
- ☐ AM Break
- ☐ PM Break

At the bottom, there's a text area for 'Please list any food allergies or dietary restrictions here:', a dropdown for 'Would you like us to send you a printed menu for future orders?' (set to 'No'), and 'Save' and 'Cancel' buttons.

5. Enter the necessary information for the services that you are adding to the booking, and then at the bottom of the page, click Save.



*Required fields are marked with a red asterisk (\*). Depending on the category that you select (Attendees, Setup Notes, Resources with Service Orders, or Resources w/out Service Orders), you might have to supply additional information such as the start and end times, the estimated count, and so on, and you might also have to answer service-specific questions.*

If you are adding catering (food) services, resources without service orders, setup notes and/or a room charge, then the Available Services tab closes. You return to the Booking Details tab with the newly added services displayed under Existing Services. If you are adding attendees and or agendas, then you remain on the Attendees/Agenda page. *After* you add *all* the necessary attendees and/or agendas, click Back to Reservation Summary page.

# Making or Canceling Reservations from your Mobile Phone

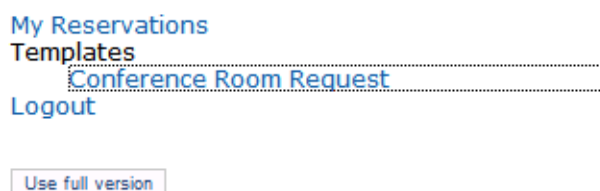
If you can access VEMS from your mobile phone, then you can [make](#) simple reservations in VEMS and/or [cancel](#) one or bookings for a reservation in VEMS.

## To make or cancel reservations in VEMS from your mobile phone

1. Log in to VEMS.

The My Reservations page opens. This page lists the Room Request options that have been configured for mobile phone access.

Figure 3-30: My Reservations page



2. Click the needed Room Request option to open its template and make or cancel reservations as needed.



*To move between the various pages of a template (equivalent to tabs in VEMS), click the Next and Previous buttons in the lower right corner of the template.*

Figure 3-31: Example of a Room Request template configured for mobile phone access

A screenshot of a 'Room Request' template form. On the left is a dark sidebar with the text 'Filter Location Details'. The main form area contains several dropdown menus: 'Date' (set to 12/10/2010), 'Start Time' (set to 2:00 PM), 'End Time' (set to 2:30 PM), and 'Facilities' (set to Corporate Center East). In the top right corner of the form is a 'Cancel' button, and in the bottom right corner is a 'Next' button.

## Chapter 3

### Reservations Menu

# Chapter 4

## My Acct Menu

---

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

This chapter covers the following topics:

- [“Modifying your User Account” on page 63.](#)
- [“Creating Delegate Accounts” on page 65.](#)
- [“Setting Default Values for Room Requests” on page 66.](#)
- [“Creating a List of Favorite Rooms” on page 68.](#)

Chapter 4  
My Acct Menu

# Modifying your User Account

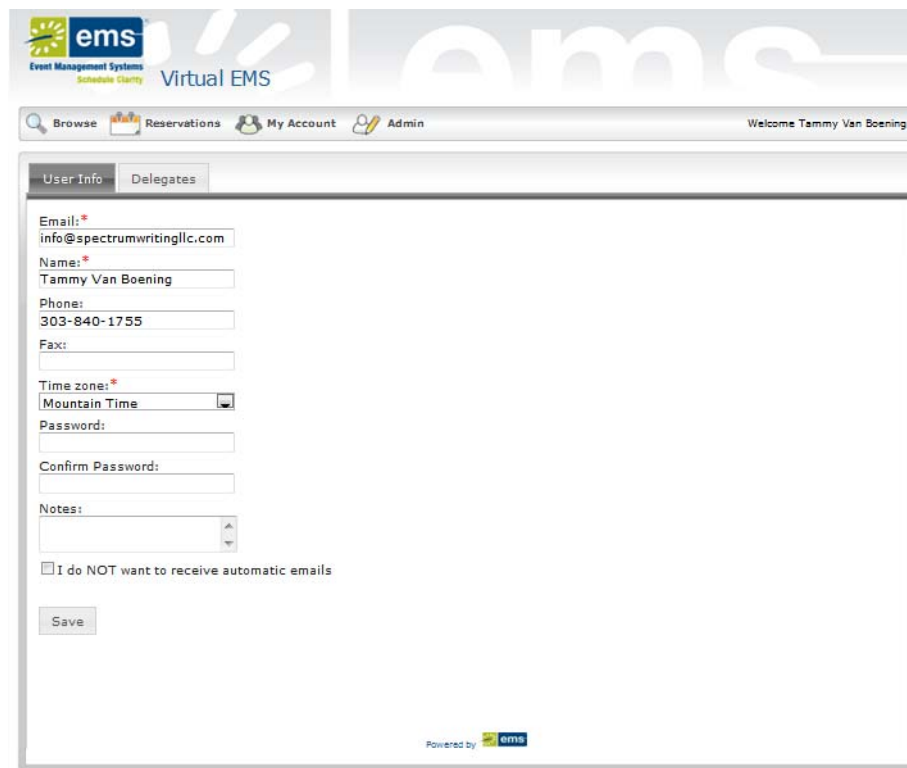
Your user account specifies your email address, your name, your phone number, your fax number, and your time zone. You can [modify](#) all of these values. Your user account also provides the option of [modifying](#) your VEMS password.

## To modify your user account

1. Under My Account, click Edit My Account.

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

Figure 4-1: User Account page, User Info tab



The screenshot shows the VEMS User Account page with the 'User Info' tab selected. The page header includes the VEMS logo and navigation links: Browse, Reservations, My Account, and Admin. The 'My Account' link is highlighted. The 'User Info' tab is active, showing a form with the following fields: Email (info@spectrumwritingllc.com), Name (Tammy Van Boening), Phone (303-840-1755), Fax (empty), Time zone (Mountain Time), Password (empty), Confirm Password (empty), and Notes (empty). There is a checkbox for 'I do NOT want to receive automatic emails' and a 'Save' button at the bottom. The page is powered by VEMS.

2. Do one or more, or all of the following:
  - Modify any of the information for your account as needed—your email address, name, phone number, and so on.



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

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



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

3. Click Save.

## Creating Delegate Accounts

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

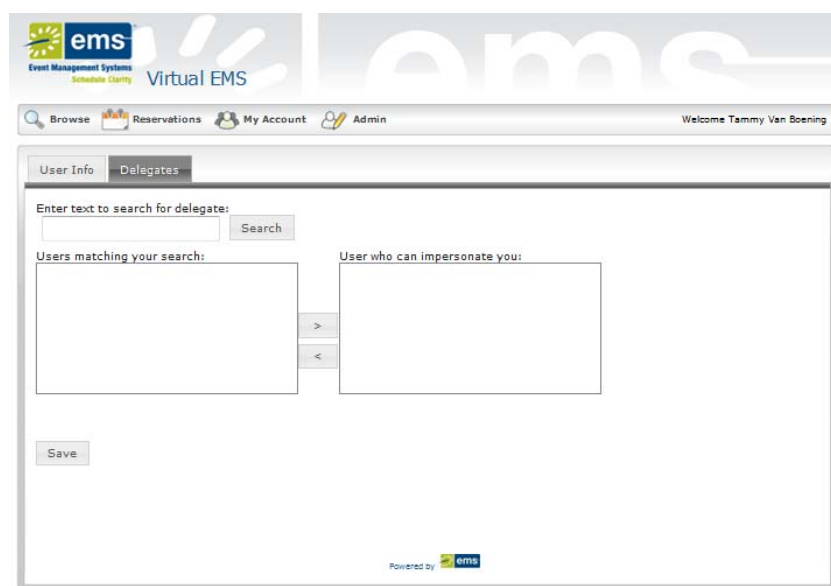
### To create delegate accounts

1. Under My Account, click Edit My Account.

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

2. Open the Delegates tab.

Figure 4-2: User Account page, Delegates tab



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

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



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

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

# Setting Default Values for Room Requests

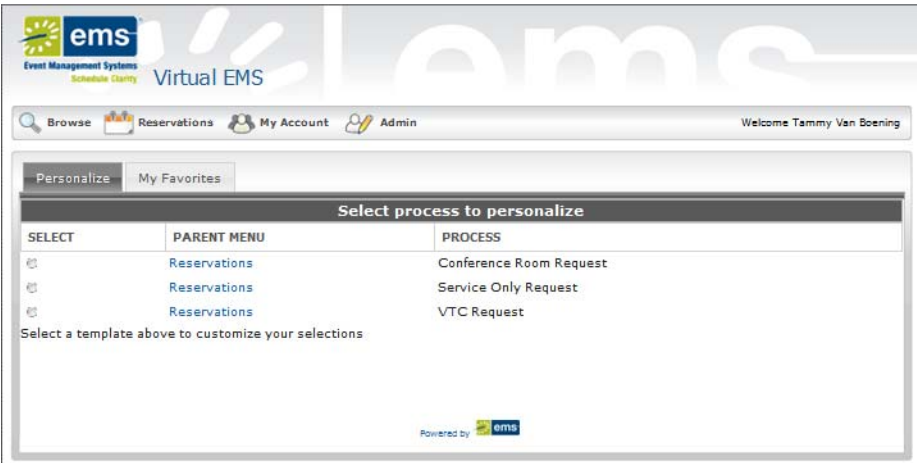
The My Account menu contains an options for [setting](#) some default values (Start Time, End Time, and so on) for the different types of room requests.

## To set default values for room requests

1. Under My Account, click User Options.

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

Figure 4-3: User Personalization page, Personalize tab



2. Select the room request process for which you want to set the default values.

The tab is refreshed with a list of options for the room request for which you can set default values. See [Figure 4-4 on page 67](#).

Figure 4-4: User Personalization page, Personalize tab with room request options that can be customized

The screenshot shows the 'Virtual EMS' user interface. At the top, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin' links. A welcome message 'Welcome Tammy Van Boening' is displayed. Below this, the 'Personalize' tab is active, showing a table titled 'Select process to personalize'.

SELECT	PARENT MENU	PROCESS
<input type="radio"/>	Reservations	Conference Room Request
<input type="radio"/>	Reservations	Service Only Request
<input type="radio"/>	Reservations	VTC Request

Below the table is the 'Personalization Options' section with the following fields:

- Start Time:  (with a clock icon)
- End Time:  (with a clock icon)
- Event Name:
- Event Type:  (dropdown menu)
- Time zone:  (dropdown menu, currently set to 'Mountain Time')
- Facilities:  (dropdown menu, currently set to '(all)')
- Save Preferences button

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

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

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

## Creating a List of Favorite Rooms

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

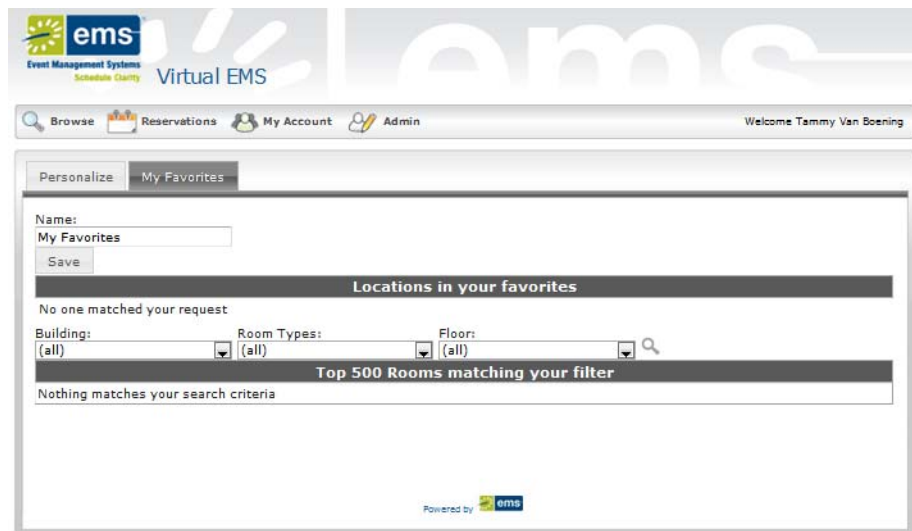
### To create a list of favorite rooms

1. Under My Account, click User Options.

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

2. Open the My Favorites tab.

Figure 4-5: User Personalization page, My Favorites tab



3. In the Name field, enter a name for your Favorites list.
4. Enter the search criteria on the Building dropdown list, the Room Type dropdown list, and/or the Floor dropdown list, and then click the Search icon to return only those rooms that meet all the search criteria.

See [Figure 4-6 on page 69](#).



---

*Floor is available only in EMS Enterprise.*

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

The screenshot shows the 'My Favorites' tab in the User Personalization page. At the top, there's a header with the 'ems' logo and 'Virtual EMS'. Below the header, there's a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin'. The main content area has a 'Personalize' tab and a 'My Favorites' tab. Under 'My Favorites', there's a 'Name:' field with 'My Favorites' entered and a 'Save' button. Below this, there's a section titled 'Locations in your favorites' with a message 'No one matched your request'. There are filters for 'Building:' (Corporate Center West), 'Room Types:' ((all)), and 'Floor:' ((all)). Below the filters, there's a table titled 'Top 500 Rooms matching your filter'.

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

At the bottom of the page, there's a 'Powered by' logo for 'ems'.

5. Click the Add icon next to each room that is to included in your Favorites list.

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

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My Acct Menu

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