

Using EMS Web App

FIU CENTRALIZED RESERVATION OFFICE

EMS SOFTWARE

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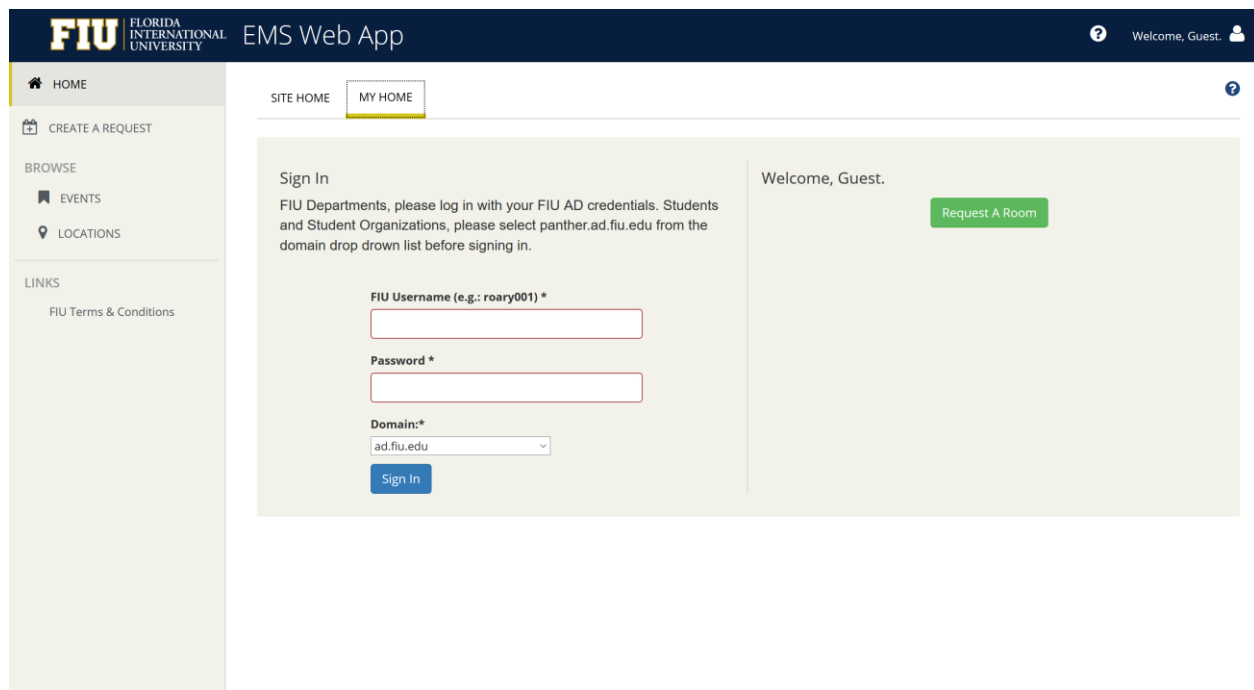
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GETTING STARTED WITH THE EMS WEBAPP

LOGGING IN AND OUT

You can access EMS Web App through any standard Internet browser.


1. Open an Internet browser session and navigate to reservations.fiu.edu. The EMS Web App home page opens, prompting you to Sign In.
2. In the **Email Address** field, enter your FIU email address and FIU password. Click for help with your password or contact your Administrator if you do not have one.
3. Then click **Sign In**. The window changes to show your MY HOME and offer more options for creating reservations and browsing events, locations, and people.



The screenshot shows the EMS Web App login interface. The header includes the FIU logo and 'EMS Web App'. The left sidebar has links for HOME, CREATE A REQUEST, BROWSE (EVENTS, LOCATIONS), and LINKS (FIU Terms & Conditions). The main content area has tabs for SITE HOME and MY HOME. The 'Sign In' section prompts users to log in with FIU AD credentials, providing fields for FIU Username (e.g., roary001), Password, and Domain (a dropdown menu currently showing ad.fiu.edu). A 'Sign In' button is at the bottom. To the right, a 'Welcome, Guest.' message is displayed with a green 'Request A Room' button.

TO LOG OUT

Under your name in the upper right corner, click the dropdown arrow and then click **Sign Out**.



The screenshot shows the 'Room Request' page after logging in. The header includes the FIU logo and 'Room Request'. The left sidebar has links for HOME, CREATE A RESERVATION, and MY EVENTS. The main content area is titled 'My Reservation Templates' and lists two categories: 'Events - Indoors (ex: ballrooms, multipurpose)' and 'Events - Outdoors (ex: patios, lawns)'. In the top right corner, the user's name 'Garcia, Deborah' is displayed with a dropdown arrow. The dropdown menu is open, showing options: 'My Account', 'Admin Functions', 'Create Custom Link', and 'Sign Out'.

INTRODUCTION TO THE HOME PAGE

Once you have signed in to EMS, you will see a menu on the left and your home page on the right. To begin making a reservation, click **CREATE A RESERVATION**. To explore events, locations, and people, use the options under **BROWSE**.

MAIN MENU

The menu on the left enables you to:

- **CREATE A RESERVATION**
- **MY EVENTS** (shows your events in a calendar grid by **Day**, **Month**, or **Date**)
- **BROWSE**
 - **EVENTS** in a calendar grid
 - **LOCATIONS** (Buildings, Facilities, Regions, and Rooms)
 - **PEOPLE**
- **LINKS** (your favorite shortcuts)

MY HOME

Once you click on MY HOME the page shows three regions:

- **My Reservation Templates** (different types of reservations you can make)
- **My Bookings** (your reservations)
- **My Infographics** (a summary of your activity)

The screenshot shows the 'MY HOME' page of the FIU Web App. The page is divided into three main sections: 'My Reservation Templates', 'My Bookings', and 'My Infographics'. Annotations with red circles and arrows highlight key features:

- Annotation 1:** Points to the 'Make reservations using your templates' text, which is positioned above a list of reservation templates. Each template has a 'book now' button.
- Annotation 2:** Points to the 'Browse events & space, find people' text, which is positioned next to a sidebar menu containing 'EVENTS', 'LOCATIONS', and 'PEOPLE'.
- Annotation 3:** Points to the 'Personalize your account' text, which is positioned next to a user profile dropdown menu.


The 'My Bookings' section shows a date filter for 'APRIL 26, 2018' and a 'SEARCH' button. Below this, a message states: 'There are no bookings for April 26, 2018. Take me to the next day containing bookings.' The 'My Infographics' section displays a summary of bookings for 'Today', 'This Week', and 'This Month'. A pie chart shows the distribution of bookings: 7 Reserved, 1 Requested, and 1 Cancelled.



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

SITE HOME

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



FLORIDA
INTERNATIONAL
UNIVERSITY

EMS Web App

?

Garcia, Deborah

▼

HOME

CREATE A RESERVATION

MY EVENTS

BROWSE

EVENTS

LOCATIONS

PEOPLE

LINKS

FIU Terms & Conditions

LOCATIONS

PEOPLE

LINKS


FIU Terms & Conditions

Get Help

SITE HOME

MY HOME

?



CENTRAL RESERVATION HUB

This is FIU's online application to request meeting, study, and event spaces as well as support services and recreational equipment. We are here to assist you with finding the best space for your event and the most efficient way to reserve it.

Selected spaces are currently available to browse and reserve. These include:

BBC Wellness and Recreation Center	MARC Pavilion	shopVenues
College of Business	Miami Beach Urban Studios	Wolfe University Center
FIU @ I-75	Other MMC Athletic spaces	Riccardo Silva Stadium
FIU in DC	Ocean Bank Convocation Center	School of Music
Graham University Center		

Access to additional spaces will be available for Phase 2. You may contact the respective Facility Manager for spaces not listed above.

Recreational equipment is limited to BBC Wellness and Recreation and only for department and student organizations events only. Students wishing to request recreational equipment may contact BBC REC directly.

If you are hosting a personal event, please log out and use the "request a room" tab under **"Welcome, Guest"** to submit your request.

READY TO PLACE A REQUEST?

- Click on **"Create A Request"** and choose from one of the Reservation Templates.
- Once you have identified a template that applies to you, click on **"book now"** and proceed with your reservation request.
- Your request should be as detailed as possible but you may book a space even if you do not know all of the specific service needs or have all of the required documentation at the time of submitting the reservation request.
- Please ensure the name under "1st contact" is the person who can make decisions and answer questions regarding the event.
- You will receive a "Request Summary" via email once you submit your request. However, this is not a guarantee of availability nor approved use of requested space. Your Event Coordinator will contact you within two business days for any further questions regarding this reservation. You may also check the status of your request by visiting reservations.fiu.edu and clicking the **"My Events"** tab.

For a complete overview on how to navigate this site, check out this [Quick Guide](#). You can download this manual onto your computer for easy access.

Questions?

Contact the Central Reservation Office (CRO) at (305) 348-1100 or visit [AskCRO.fiu.edu](https://askcro.fiu.edu).

Be sure to log out once you are finished!

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BROWSING EVENTS, LOCATIONS, AND PEOPLE

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

FIU | FLORIDA INTERNATIONAL UNIVERSITY

Browse Events

Parra, Marco

Filters **Compact View** **Saved Filters**

Date: Sun 04/01/201 **Add Filter**

Save Filters

BROWSE

- EVENTS
- LOCATIONS
- PEOPLE

LINKS

FIU Terms & Conditions

DAILY LIST **WEEKLY LIST** **MONTHLY LIST**

< Mar **April 2018** May >

SUN	MON	TUE	WED	THU	FRI	SAT
1 8:00am Test - ...	2 7:30am Stude... 7:30am Stude... 7:30am Stude...	3 7:30am Stude... 7:30am Stude...	4 7:30am Stude... 7:30am Stude...	5 7:30am Stude... 7:30am Stude...	6 7:30am Stude... 7:30am Stude...	7 7:30am Stude... 7:30am Stude...
	+ 37 more events	+ 46 more events	+ 39 more events	+ 38 more events	+ 26 more events	+ 21 more events
8 8:00am MUT-... 9:00am MUT-... 10:00am MU... 11:00am MUL... 11:00am MUT...	9 8:00am MUT-... 8:00am chris ... 8:00am Hozle... 8:00am test, ... 8:00am Hozle...	10 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	11 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	12 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	13 11:00am MUL... 2:00pm MUN-... 6:00pm MUN-... 8:00pm Bank ...	14 8:00pm Facilit... 8:00pm Facilit... 8:00pm Facilit...
	+ 9 more events	+ 20 more events	+ 11 more events	+ 16 more events		
15 8:00am MUT-... 9:00am MUT-... 10:00am MU... 11:00am MUL... 11:00am MUT...	16 8:00am MUT-... 8:00am chris ... 8:00am test, ... 8:00am Hozle...	17 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	18 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	19 8:00am MUT-... 8:00am chris ... 8:00am Test, ... 8:00am Confir... 8:00am TPP-2...	20 8:00am test, ... 11:00am MUL... 12:00pm Test...	21 9:00am Addin... 10:00pm prici...
	+ 20 more events					

In the next sections, you will learn how to: Browse Events, Browse Locations, and Browse People.

BROWSING EVENTS

You may wish to browse and explore existing events before you make a reservation in order to build familiarity with facilities, related or adjacent events, and other users' reservations.

BROWSING EVENTS BEFORE MAKING A RESERVATION

1. Click Browse>Events in the menu bar.
2. The BROWSE EVENTS page displays events in a daily (default), weekly, or monthly view.

The screenshot shows the 'Browse Events' page for Florida International University. The left sidebar contains navigation links: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS (highlighted), LOCATIONS, PEOPLE, and LINKS (with a link to FIU Terms & Conditions). The main content area has a 'Filters' section with a date picker set to 'Fri 04/27/2018'. A 'Save Filters' button is present. A 'Filter your view' dropdown menu is open, showing options: Locations, Room, Customer Name, Event Name, Event Type, Customer Type, and Room Types. A 'Save view filters for next time' button and a 'Compact View' button are also visible. A table of events is displayed for 'Friday, April 27th 2018'. Annotations with red arrows point to various elements: 'View your reservations and bookings' points to the 'MY EVENTS' link; 'Filter your view' points to the filter dropdown; 'Save view filters for next time' points to the corresponding button; 'View an event' points to an event name in the table; 'View a room' points to a location in the table; and 'Save Filters' points to the button.

START TIME	END TIME	TIME ZONE	EVENT NAME	LOCATION	CUSTOMER
8:00 AM	12:00 PM	ET	Test	GC - GC 140	Graham Center
8:00 AM	12:00 PM	ET	Test	GC - GC 125B	Graham Center
8:00 AM	12:00 AM	ET	Bus and Finance Goal Setting meeting	MANGO - MANGO 100E1	Office of Business and Finance
10:00 AM	2:00 PM	ET	web app test - new rate schedule	GC - GC 155	Space Reservation - Tax Auto Add Test

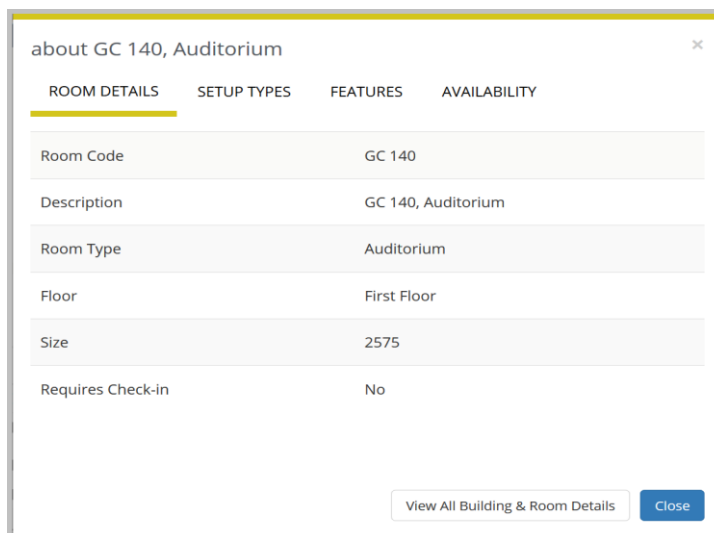
3. To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.

The screenshot shows a 'Booking Details' popup window. It has two tabs: 'EVENT DETAILS' (selected) and 'RELATED EVENTS'. The 'EVENT DETAILS' tab displays the following information:

- Event Name: Test
- Date: Friday Apr 27, 2018
- Event Time: 8:00 AM - 12:00 PM
- Reserved Time: 7:30 AM - 12:30 PM
- Location: GC - GC 140
- Customer: Graham Center
- 1st Contact Name: Garcia, Deborah
- 1st Contact Phone: 305/348-0076
- 1st Contact Email: debogarc@fiu.edu
- Reservation ID: 7186

At the bottom of the popup, there are three buttons: 'Add to My Calendar' (highlighted with a red box and arrow), 'Share' (with a plus icon), and 'Close'. A red box and arrow also point to the 'Add to your Outlook calendar' text next to the 'Share' button.

4. To see Room information, click the room name.



BROWSING EVENTS: USING FILTERS

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

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

To filter basic information, use the filters along the top of the window.

Basic Filters	How They Work
Date	The date on which the view will focus.
Time Zone	The Time zone on which to display the schedule.

To filter in more detail, click the dropdown option.

Detailed Filters	How They Work
Locations	Browse only events for the location you select.
Room	Browse only events for the room you select.
Group	Browse only events for the group you select.
Event Name	Browse for a specific event by name.
Group Type	Browse for all events for a type of group you specify.
Room Types	Browse for events in a type of room you specify.

BROWSING LOCATIONS

The EMS Web App LOCATIONS menu option helps you explore facilities and booked space, and is especially useful when you know which space you want and need to find time slots when the space is available. Once you have located an available time slot, you can click **CREATE A RESERVATION** from the main menu to book space.

1. From the left menu in EMS Web App, click **BROWSE > LOCATIONS**. The Browse Locations page shows available rooms in a calendar view.

The screenshot shows the 'Browse Locations' page in the FIU EMS Web App. The left sidebar contains a menu with options: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, LOCATIONS (highlighted), and PREFERRED. The main content area is titled 'Browse Locations' and includes a 'Filters' section with a date picker set to 'Thu 04/26/2018' and a 'Time Zone' dropdown set to 'Eastern Time'. A red box labeled '1' highlights the 'Filters' section, and a red arrow points to the 'Adjust your filters here' link. Below the filters is a 'Locations' section with a calendar view for 'Thu April 26, 2018'. A red box labeled '2' highlights the calendar view, and a red arrow points to the 'Save filters as default' link. The calendar shows a grid of time slots from 7 AM to 9 PM. Below the calendar is a table of available rooms:

Room Name	Capacity	7 AM	8	9	10	11	12 PM	1	2	3	4	5	6	7	8	9
AQUATIC COMPLEX (ET)	Cap															
AQC 100, Bbc Pool	300															
Diving Well	20															
Long Lane 01	10															
Long Lane 02	10															



Concept: Filters along the top of the **Browse Locations** page enable you to quickly focus the view on rooms in a specific timeframe, and by room features such as equipment, room type, and geographic location. This helps you find available space to quickly meet your requirements. To add and remove location filters, click the Add/Remove Locations option, which presents a Locations filter popup where you can select by building, area, and view.

2. To learn more about a location, click the location name. The Location Details window appears (if you have permissions), showing details about the location.
3. Click View All Building & Room Details to see details. Depending on how your Administrator has configured your EMS Web App application, the window can show varying information about the location, including the building details (name, description, and/or notes), photos and floorplans (images), description, room type, setup type, and other features.



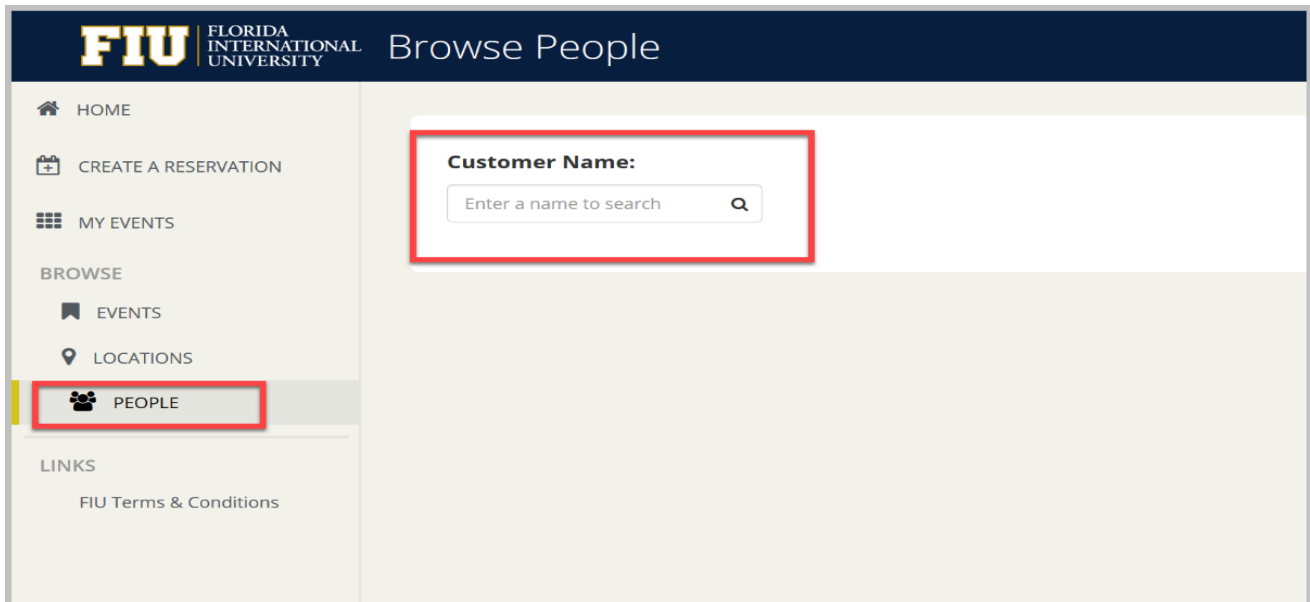
Tip: The LINKED TEMPLATES tab may be available depending on your implementation. This option will allow you to make a reservation for this room. Once you locate a room you wish to book, use this shortcut to quickly begin the process.

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

LOCATING PEOPLE

You can click **BROWSE > PEOPLE** from the main EMS Web App menu to find events by the person who reserved or is attending the event, or to simply find where a user or group will be located at a given time.

- **To see all people and groups** who have events scheduled for today, leave the Name field blank and click Search. To narrow the results to only the bookings for one person or group, click on the user or group name.
- **To search for a specific person or group**, enter at least the first three letters in the Name field (EMS Web App will suggest the closest match), and then click Search.



Tip: The Search field is not case-sensitive and you can search by first or last name.

BROWSE EVENTS PAGE OVERVIEW

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



Tip: To view and work with your own reservations and bookings, click on MY EVENTS

The screenshot shows the 'Browse Events' page for Florida International University. The page includes a left sidebar with navigation links: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE (with sub-links for EVENTS, LOCATIONS, and PEOPLE), and LINKS (with a link to FIU Terms & Conditions). The main content area features a 'Filters' section with a date picker set to 'Fri 04/27/2018'. A 'Save Filters' button is present. A 'Filter your view' dropdown menu is open, showing options: Locations, Room, Customer Name, Event Name, Event Type, Customer Type, and Room Types. A 'Save view filters for next time' button is also visible. The main event list is displayed in a table format with columns: START TIME, END TIME, TIME ZONE, EVENT NAME, LOCATION, and CUSTOMER. The table shows three events: 'Test' (8:00 AM - 12:00 PM, ET, GC - GC 140), 'Test' (8:00 AM - 12:00 PM, ET, GC - GC 125B), and 'Bus and Finance Goal Setting meeting' (8:00 AM - 12:00 AM, ET, MANGO - MANGO 100E1). A 'View an event' button is highlighted over the first 'Test' event. A 'View a room' button is highlighted over the 'GC - GC 140' location. A 'Compact View' button is visible in the top right corner. A 'Saved Filters' button is also present.

START TIME	END TIME	TIME ZONE	EVENT NAME	LOCATION	CUSTOMER
8:00 AM	12:00 PM	ET	Test	GC - GC 140	Graham Center
8:00 AM	12:00 PM	ET	Test	GC - GC 125B	Graham Center
8:00 AM	12:00 AM	ET	Bus and Finance Goal Setting meeting	MANGO - MANGO 100E1	Office of Business and Finance
10:00 AM	2:00 PM	ET	web app test - new rate schedule	GC - GC 155	Space Reservation - Tax Auto Add Test

EVENT DETAILS PAGE

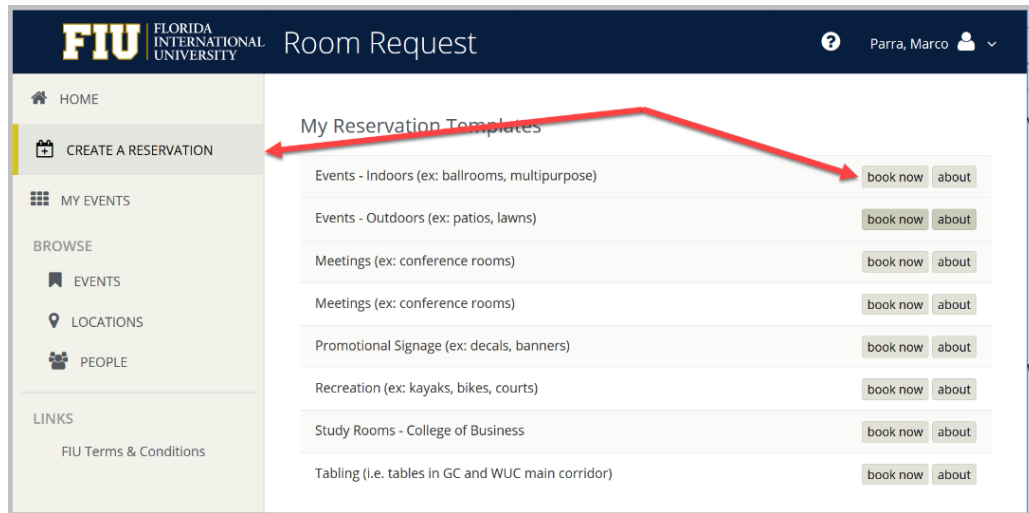
To browse existing events from BROWSE EVENTS, click on an event name. This shows Event Details in a popup.

MAKING A RESERVATION IN THE EMS WEB APP

You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the

[book now](#)

button next to one of your reservation templates (on the right).



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

[Next Step](#)

to advance through the process.

Specify When & Where


1. To specify When, select dates, times, recurrence (optional) and time zone for the reservation in the upper left panel.

2. To specify Where, in lower left panel, select


- Let Me Search for a Room

OR

- I Know What Room I Want

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

Locating space as part of the reservation process is different than browsing locations.

 Tip: Once you have established favorites, EMS Web App uses these (plus the parameters of the booking template in use) to filter your search results when you use the Let Me Search for a Room option. To expand your search results beyond your favorites, de-select the Favorite rooms only checkbox or click Add/

Remove next to Locations.

☐ Let Me Search For A Room

Locations

(all)

Add/Remove

Floors

(all)

Add/Remove

Setup Types

(no preference)

Add/Remove

Room Types


(all)

Add/Remove

Features


(none)

Add/Remove

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

4. Once you complete all required fields on this tab, click in the upper right corner.

Choose Services 

 Concept: This is an optional feature based on the booking template you use.

Services include room setup and teardown, equipment, and any other services you wish to associate with a room. Your Administrator sets which services can be associated with a room and with an event type.

7. Under the Services tab in the Create Reservation screen, specify any services you wish to associate with the reservation (if available, you can click Skip Services).

FIU

FLORIDA INTERNATIONAL UNIVERSITY

Room Request

?

Parra, Marco

✕ Events - Indoors (ex: ballrooms, multipurpose)

1 Rooms

2 Services

3 Reservation Details

My Cart (1)

Create Reservation

Services For Your Reservation

Next Step

FIU Police

Event Personnel

GC - AVV Media Services

Computers & Peripherals

Lights

Miscellaneous

Pipe & Drape

Video/Sound

GC - Operations

Dance Floor

Partitions

Stage

Stanchions

Round Tables

Rectangular Tables

High Top Tables

Skinny Tables

Other Tables

Linens

Chairs

MTS - Live Events

Audio

Audio Recorder

PA System package

Press Box

Wired Handheld Microphone

Wireless Lavalier Microphone

Video Equipment

Lighting

Large Speakers (pair)

Podium microphone

Table Top Microphone

Wireless Handheld Microphone

MTS - Photography Services

MTS - Photography Services

MTS - Video Conferencing

MTS - Video Conferencing

MTS - Video Services

MTS - Video Services

MTS - Web Streaming

MTS - Web Streaming

Parking and Transportation

Golf Carts

Other Services

Parking Spaces

Signage

Transportation

Services Summary

8. When complete, click

Next Step

in the upper right corner.

Add Reservation Details

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to all attendees. The example shown below may differ from your implementation.

9. Complete all required information and click

Save Reservation Details

, and then

Create Reservation

Tip: To add the reservation to your Outlook calendar, click the Add this reservation to my calendar option at the bottom of the window.

WAYS TO MAKE RESERVATIONS

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

1. Request a Reservation

If you logged in as a guest, you can submit a reservation request that will be approved by an authorized EMS Web App user.

2. Book Now Using Your Template

Click the **book now** button next to the template you prefer from your home page, and then browse for available time slots and rooms.

3. Browse and Then Book

Click **BROWSE** (main menu):

- Browse **EVENTS**. Then request a reservation or, if authorized, click **CREATE A RESERVATION** from the main menu and select a template to streamline the booking process.

OR

- Browse **LOCATIONS**, find the room you want, and click on any blank slot in the room's calendar. Then select a template to streamline the booking process.

The screenshot shows the FIU EMS Web App interface. The header includes the FIU logo and 'FLORIDA INTERNATIONAL UNIVERSITY Web App'. The user is logged in as 'Parra, Marco'. The left sidebar contains navigation links: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE (with sub-links for EVENTS, LOCATIONS, and PEOPLE), and LINKS (with a link to FIU Terms & Conditions). The main content area is titled 'My Reservation Templates' and lists various templates with 'book now' and 'about' buttons. Annotations with red boxes and arrows point to specific elements: one points to 'CREATE A RESERVATION' with the text 'Select from your booking templates to quickly begin a reservation'; another points to the 'book now' button for the 'Events - Indoors' template with the text 'Click book now next to the template you prefer to begin making a reservation'; and a third points to the 'EVENTS' link in the sidebar with the text 'Browse first and then choose open EVENTS available LOCATIONS'. Below the templates, there is a 'My Bookings' section showing a calendar for April 27, 2018, with a search bar and a table of bookings.

**Tip: First Browse and Then Book**

To familiarize yourself with the locations, try Browsing Events, Locations, and People before requesting rooms or making reservations. Exploring the EMS Web App this way helps you explore available space, view the schedule at a high level, and understand how other users in your organization reserve rooms. You can also establish your own naming conventions for your events and narrow down your searches to specific room types, room features, event types, geographical areas, and so on.

**Concepts: Booking Templates, Requests, and Reservations**

Templates: Your My Account settings contain reservation Templates created by you or your Administrator to streamline the process of booking events. Rooms and workspaces are individually set to work with various types of booking templates by your Administrator.

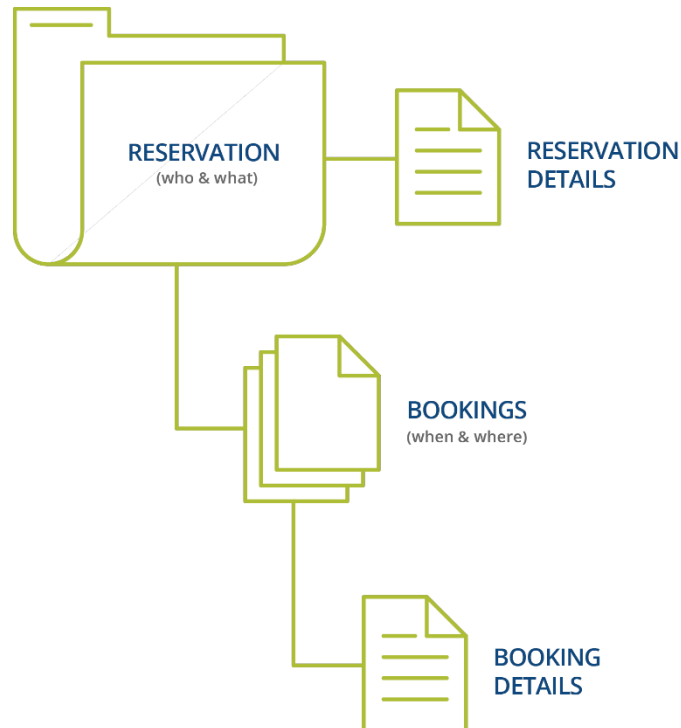
Requests vs. Reservations: Depending on your permissions, you may **Request** a Room or **Make** a Reservation. Room requests require approval from a more supervisory user, and are visible to other users so they know the space has been tentatively booked. The EMS Web App behaves differently for each type of user, showing fewer options (and usually, less information) for those who can only request rooms.

THE RESERVATION PROCESS: WHO & WHAT, WHERE & WHEN

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

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

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



RESERVATIONS: WHO AND WHAT

A *reservation* is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).

BOOKINGS: WHERE AND WHEN

A *booking* is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.

BOOKING DETAILS

A booking can have one or more booking details associated with it. *Booking details* are the resources (items for the meeting) or services (people and their activities) that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for the Academic Planning Board's staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker's podium, and so on).

Service Orders

System Administrators configure "buckets" of these details as "Categories," which streamlines the process of adding details to bookings.



Concept: Services, Categories, and Resources: What's the Difference? (click to expand)

In EMS, you may hear these terms used interchangeably sometimes, however, they are different concepts.

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

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

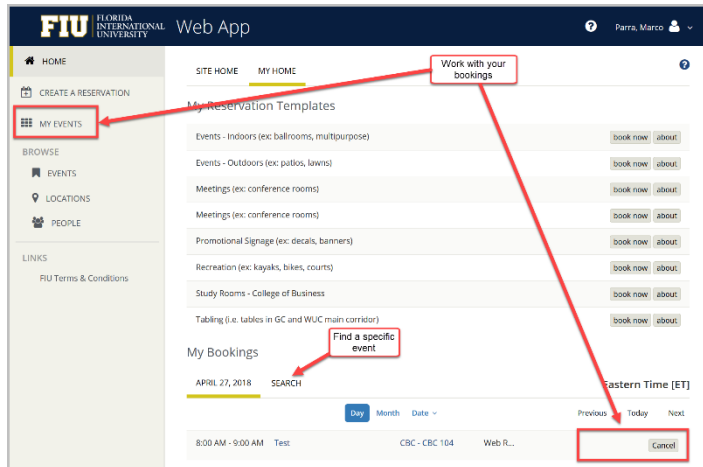
Furthermore, a Category can be configured to "Use States" so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option



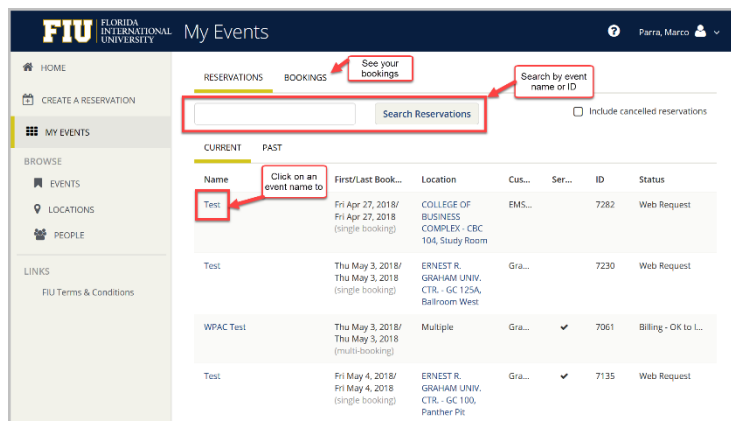
in EMS Desktop Client.

VIEWING YOUR EVENTS

You can quickly view your events, reservations, and requests on both your MY HOME page as well as your MY EVENTS page.



1. Click **MY EVENTS** to see your reservations and bookings. Your view defaults to your current reservations. To view or edit a reservations, click the name of the reservation.



Tip: EMS only returns search results that contain the exact order of the characters in your search string, but EMS does not care about if your search string is uppercase or lowercase. In addition, EMS will return search results that contain your search string regardless of where those characters appear. For example, a search string of ed returns the College of Education Seminar, Ed Smith fundraiser, Health Center Education Training, and so on.



Concept: The **BROWSE > EVENTS** menu option shows all of your reservations as well as all reservations that you are authorized to view. The **MY EVENTS** menu option shows only *your* reservations and bookings. Before making your own reservations, especially if you are a newer EMS Web App user, we recommend that you **BROWSE > EVENTS** first to build familiarity with your organization's booking practices, schedule, facilities, and users.

- To view Reservation and booking details, click on an event name. Event details display; bookings within the reservation show in the lower half of the screen.

The screenshot displays the 'My Events' page for a test beginning on April 27, 2018. The page is divided into two main sections: 'Reservation Details' and 'Bookings'.

Reservation Details:

- Event Name:** Test
- Event Type:** Study Session
- Customer:** EMS_COB-Students
- 1st Contact Name:** Garcia, Deborah

Reservation Tasks:

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

Bookings:

- Current Bookings:**
 - Date:** Fri Apr 27, 2018
 - Start Time:** 8:00 AM
 - End Time:** 9:00 AM
 - Time Zone:** ET
 - Location:** COLLEGE OF BUSINESS COMPLEX - CBC 104, Study Room
 - Attendance:** 1
 - Setup Type:** As Is
 - Status:** Web Request

Callout Boxes:

- Work with the reservation:** Points to the 'Edit Reservation Details' link and the 'Cancel Reservation' button.
- Work with a booking:** Points to the 'Edit' icon in the 'Current Bookings' table.
- See room tables:** Points to the 'Location' column header.
- Add another booking to this reservation:** Points to the 'New Booking' button.

SEARCHING FOR AVAILABLE ROOMS

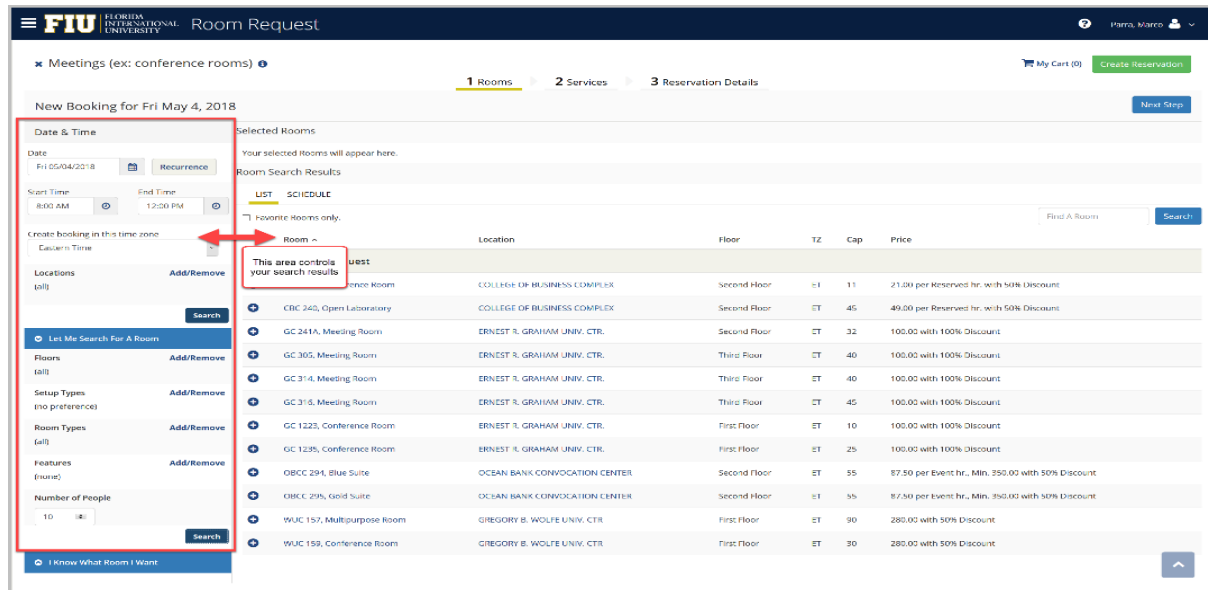
During the booking process, you can search for available rooms in two ways:

1. From the Create a Reservation screen, in the Bookings area, select

- **Let Me Search For A Room**

OR

- **I Know What Room I Want**



FIU FLORIDA INTERNATIONAL UNIVERSITY Room Request

Meetings (ex: conference rooms) 1 Rooms 2 Services 3 Reservation Details

New Booking for Fri May 4, 2018

Date & Time: Fri 05/04/2018, Start Time: 8:00 AM, End Time: 12:00 PM

Locations: (all) Add/Remove Search

Floors: (all) Add/Remove

Setup Types: (no preference) Add/Remove

Room Types: (all) Add/Remove

Features: (none) Add/Remove

Number of People: 10 Add/Remove Search

Let Me Search For A Room

I Know What Room I Want

Room Search Results

Room	Location	Floor	TZ	Cap	Price
GC 240, Open Laboratory	COLLEGE OF BUSINESS COMPLEX	Second Floor	ET	45	49.00 per Reserved hr., with 50% Discount
GC 241A, Meeting Room	ERNEST S. GRAHAM UNIV. CTR.	Second Floor	ET	32	100.00 with 100% Discount
GC 305, Meeting Room	ERNEST S. GRAHAM UNIV. CTR.	Third Floor	ET	40	100.00 with 100% Discount
GC 314, Meeting Room	ERNEST S. GRAHAM UNIV. CTR.	Third Floor	ET	40	100.00 with 100% Discount
GC 316, Meeting Room	ERNEST S. GRAHAM UNIV. CTR.	Third Floor	ET	45	100.00 with 100% Discount
GC 1223, Conference Room	ERNEST S. GRAHAM UNIV. CTR.	First Floor	ET	10	100.00 with 100% Discount
GC 1235, Conference Room	ERNEST S. GRAHAM UNIV. CTR.	First Floor	ET	25	100.00 with 100% Discount
OBCC 294, Blue Suite	OCEAN BANK CONVOCATION CENTER	Second Floor	ET	55	\$7.50 per Event hr., Min. 350.00 with 50% Discount
OBCC 295, Gold Suite	OCEAN BANK CONVOCATION CENTER	Second Floor	ET	55	\$7.50 per Event hr., Min. 350.00 with 50% Discount
WUC 152, Multipurpose Room	GREGORY B. WOLFE UNIV. CTR.	First Floor	ET	90	280.00 with 50% Discount
WUC 153, Conference Room	GREGORY B. WOLFE UNIV. CTR.	First Floor	ET	30	280.00 with 50% Discount



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

Locating space as part of the reservation process is different than simply browsing locations.

2. Once you have located a room to reserve, click the Add



icon to add it to your reservation; this adds the booking to your cart. You can change your mind and delete or change the room for the booking before you finalize your Reservation.

BOOKING MULTIPLE ROOMS

During the reservation process, you can select more than one room (if the template you're using permits it).

1. Once you have found available rooms, click **Add**



to move each room into the Selected Rooms area. You can repeat this for each room you want to add to your reservation.

FIU FLORIDA INTERNATIONAL UNIVERSITY Room Request

Meetings (ex: conference rooms) 1 Rooms 2 Services 2. Rooms show here and in your cart My Cart (4) Create Reservation

New Booking for Fri May 4, 2018

Date & Time
Date: Fri 05/04/2018 Recurrence
Start Time: 8:00 AM End Time: 12:00 PM
Create booking in this time zone: Eastern Time
Locations: (all) Add/Remove Search
Let Me Search For A Room I Know What Room I Want
Room Name: Search

Selected Rooms Attendance & Setup Type
GC 305, Meeting Room CBC 206, Conference Room OBCC 294, Blue Suite
WUC 159, Conference Room

Room Search Results
LIST SCHEDULE
Favorite... Find A Room Search

Room	Location	Floor	TZ	Cap	Price
CBC 206, Conference Room	COLLEGE OF BUSINESS COMPLEX	Second Floor	ET	11	21.00 per Reserved hr. with 50% Discount
CBC 240, Open Laboratory	COLLEGE OF BUSINESS COMPLEX	Second Floor	ET	45	49.00 per Reserved hr. with 50% Discount
GC 241A, Meeting Room	ERNEST R. GRAHAM UNIV. CTR.	Second Floor	ET	32	100.00 with 100% Discount
GC 305, Meeting Room	ERNEST R. GRAHAM UNIV. CTR.	Third Floor	ET	40	100.00 with 100% Discount
GC 314, Meeting Room	ERNEST R. GRAHAM UNIV. CTR.	Third Floor	ET	40	100.00 with 100% Discount

As you book each room, EMS will prompt you to enter attendees and setup type.

Attendance & Setup Type

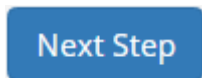
To continue, please enter the number of attendees and desired setup type for this Room.

No. of Attendees * 10 1. Enter headcount

Setup Type * Theater 2. Pick setup type

3. Book the room Add Room Cancel

2. Click



to continue with the booking process.

BOOKING RECURRING MEETINGS

You can begin making a reservation by clicking the CREATE A RESERVATION option (on the left menu) or the

[book now](#)

button next to one of your reservation templates (on the right).

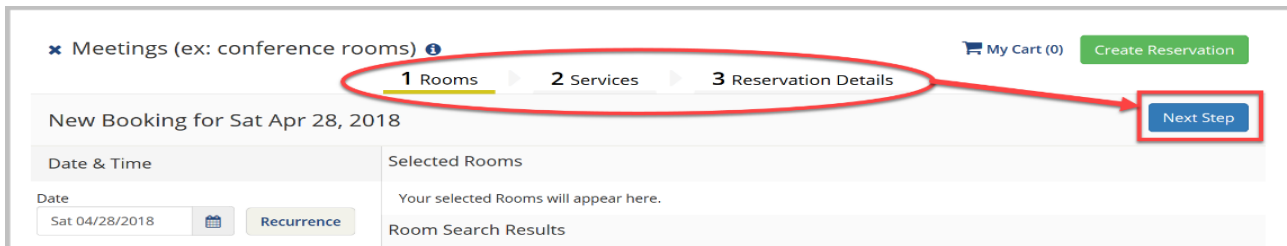


Next, the Create a Reservation screen launches, where EMS Web App will lead you through the reservation process.

Enter your information (including all required fields) and click

[Next Step](#)

to advance through the process.



SPECIFY WHEN & WHERE

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

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

The 'Recurrence' dialog box contains the following fields and options:

- Repeats:** A dropdown menu set to 'Daily' and a 'Remove Recurrence' button.
- Frequency:** Radio buttons for 'Every' (selected) and 'Weekdays Only'. The 'Every' option is followed by a text input '1' and the label 'day(s)'.
- Date Range:** Radio buttons for 'Start Date' and 'End Date' (selected). The 'Start Date' is 'Fri 05/04/2018'. The 'End Date' is 'Sat 05/05/2018' with '(2 occurrences)' noted next to it. There is also an 'End after' option with a text input '1' and the label 'occurrence(s)'.
- Time Range:** Text inputs for 'Start Time' (8:00 AM) and 'End Time' (12:00 PM), each with a clock icon.
- Time Zone:** A dropdown menu labeled 'Create booking in this time zone' set to 'Eastern Time'.
- Buttons:** 'Apply Recurrence' and 'Close' at the bottom right.

- b. Click **Apply Recurrence**

Apply Recurrence

to validate your entries and return to the New Booking screen.



Tip: Once booked, each meeting will show as a single Booking in your My Bookings area on MY HOME. Also, note that the **Create Booking In** field specifies the time zone in which to book the meeting, which may differ from your system time zone.

3. To specify **Where**, in lower left panel, select

- **Let Me Search For A Room**
- OR

- **I Know What Room I Want**



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

Locating space as part of the reservation process is different than simply browsing locations.

4. Once you have located a room to reserve, click the Add



icon to validate and add the booking to your cart. You can delete or change the room before you finalize your Reservation.

5. Once you have completed all required fields, click

Next Step

in the upper right corner.

CHOOSE SERVICES



Concept: This is an optional feature based on the booking template you use.

Services include room setup and teardown, equipment, and any other services you wish to associate with a room.

1. Under the **Services** tab in the Create Reservation screen, specify any services you wish to associate with the reservation, or click **Skip Services**.
2. When complete, click

Next Step

in the upper right corner.

ADD RESERVATION DETAILS

The Reservation Details screen finalizes information about your reservation. Invitations to bookings and attachments will be sent to all attendees. The example shown below may differ from your implementation.

Complete all required information and click

Save Reservation Details

, and then

Create Reservation

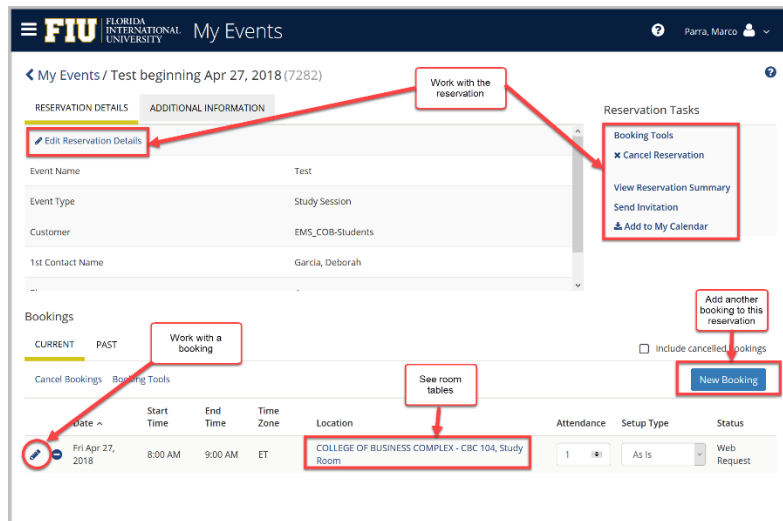


Tip: To add the reservation to your Outlook calendar, click the Add this reservation to my calendar option at the bottom of the window.

ADDING RESERVATION DETAILS

If you open an existing reservation or create a new one, the Reservation Summary page opens. This area enables you to modify bookings within a reservation, such as requesting services and adding attendees.

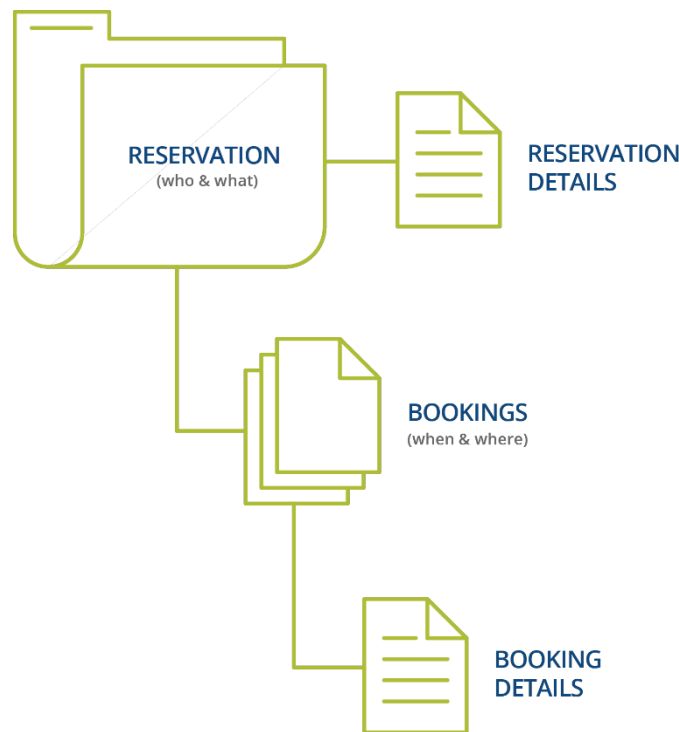
The Reservation Details option displays detailed summary information (the Reservation ID, the Event Name, the Event Type, and so on) for the selected reservation and all its bookings as well as attendees and any services that were requested for the bookings.



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

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

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



RESERVATIONS: WHO AND WHAT

A *reservation* is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).

BOOKINGS: WHERE AND WHEN

A *booking* is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.

BOOKING DETAILS

A booking can have one or more booking details associated with it. *Booking details* are the resources (items for the meeting) or services (people and their activities) that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for the Academic Planning Board's staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker's podium, and so on).

SERVICE ORDERS

System Administrators configure "buckets" of these details as "Categories," which streamlines the process of adding details to bookings.



Concept: Services, Categories, and Resources: What's the Difference?

In EMS, you may hear these terms used interchangeably sometimes, however, they are different concepts.

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

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

Furthermore, a Category can be configured to "Use States" so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option



In EMS Desktop Client.


ATTACHMENTS

The Attachments tab is available if the reservation type required attachments; it provides the attachment description, file name, and notes about the attachment. You can:

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

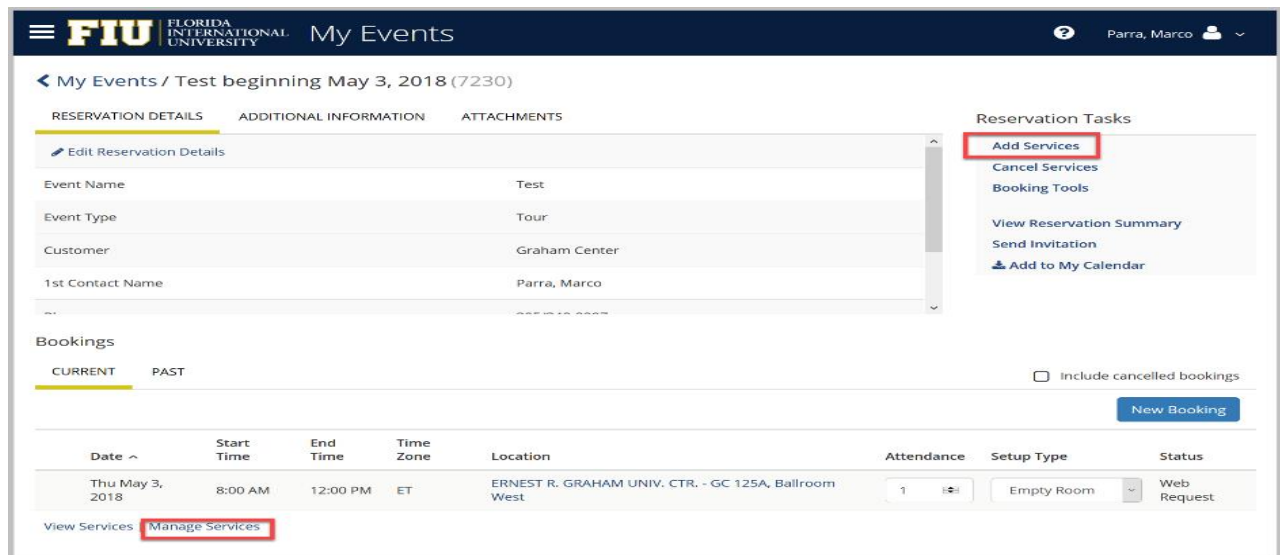
BOOKINGS FOR THE RESERVATION

The lower portion of the Reservation Summary page shows bookings for this reservation and (if you have permissions) enables you to add another booking, edit or delete existing bookings, and take other actions on those bookings.

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

ADDING SERVICES TO A MEETING

1. To add services to an existing event, click on **My Events** and open the reservation you wish to edit.
2. Click **Add Services** to add these details to the meeting.



FIU FLORIDA INTERNATIONAL UNIVERSITY My Events Parra, Marco

< My Events / Test beginning May 3, 2018 (7230)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

[Edit Reservation Details](#)

Event Name	Test
Event Type	Tour
Customer	Graham Center
1st Contact Name	Parra, Marco

Bookings

CURRENT PAST ☐ Include cancelled bookings [New Booking](#)

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 3, 2018	8:00 AM	12:00 PM	ET	ERNEST R. GRAHAM UNIV. CTR. - GC 125A, Ballroom West	1	Empty Room	Web Request

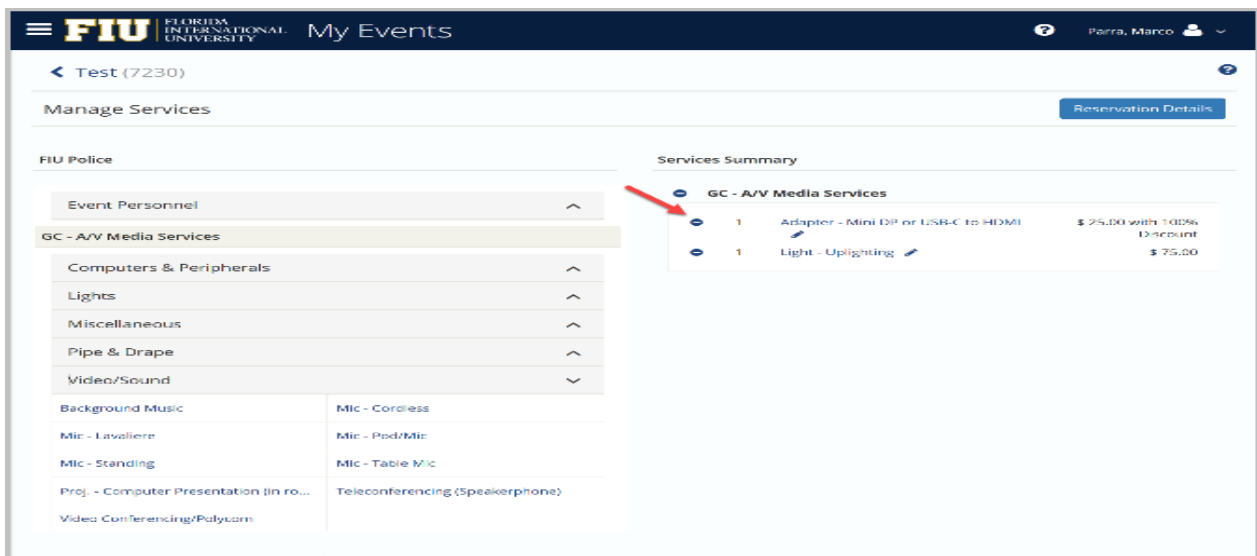
[View Services](#) [Manage Services](#)

Reservation Tasks

- [Add Services](#)
- [Cancel Services](#)
- [Booking Tools](#)
- [View Reservation Summary](#)
- [Send Invitation](#)
- [Add to My Calendar](#)



Tip: Once you have added services and reserved space, you can work with services by clicking **Manage Services**.



FIU FLORIDA INTERNATIONAL UNIVERSITY My Events Parra, Marco

< Test (7230)

Manage Services [Reservation Details](#)

FIU Police

Event Personnel

GC - A/V Media Services

Computers & Peripherals

Lights

Miscellaneous

Pipe & Drape

Video/Sound

Background Music

Mic - Cordless

Mic - Lavalier

Mic - Pod/Mic

Mic - Standing

Mic - Table Mic

Proj. - Computer Presentation (in ro...

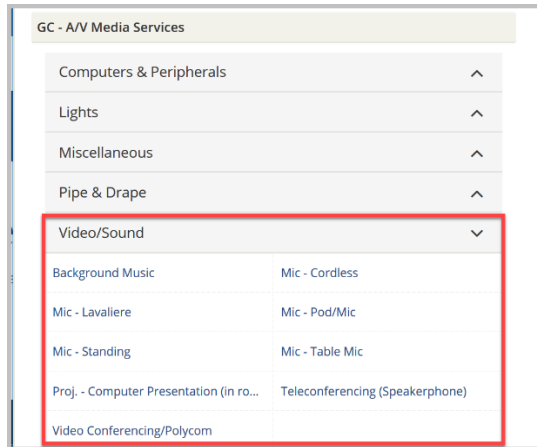
Teleconferencing (Speakerphone)

Video Conferencing/Polycam

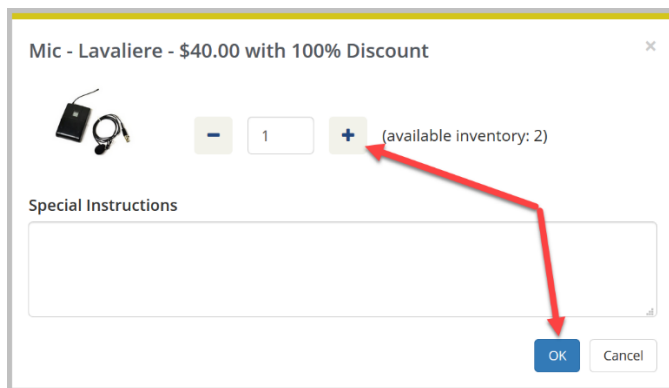
Services Summary

GC - A/V Media Services			
1	Adapter - Mini DP or USB-C to HDMI	\$ 25.00 with 100% Discount	
1	Light - Uplighting	\$ 75.00	

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



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



- The right panel of the Select Services window updates to show your latest additions. When you have added all services for the meeting, click the **Next Step** button.

FIU Police

Event Personnel ^

GC - A/V Media Services

Computers & Peripherals ^

Lights ^

Miscellaneous ^

Pipe & Drape ^

Video/Sound v

Background Music: Mic - Cordless

Mic - Lavalier: Mic - Pod/Mic

Mic - Standing: Mic - Table Mic

Proj. - Computer Presentation (in ro...: Teleconferencing (Speakerphone)

Video Conferencing/Polycom

Services Summary

GC - A/V Media Services

1	Adapter - Mini DP or USB-C to HDMI	\$ 25.00 with 100% Discount
1	Light - Uplighting	\$ 75.00
1	Mic - Lavalier	\$ 40.00 with 100% Discount

6. The next screen lists all bookings within the reservation you selected from My Events. Select the booking to which you wish to add services (if the reservation includes multiple booking, they are all listed here for you to select), and click the **Add Services** button.

FIU FLORIDA INTERNATIONAL UNIVERSITY My Events

Parra, Marco

Select Services / Test (7230)

Add Services [Add Services](#)

<input checked="" type="checkbox"/>	Date	Booking Time	Time Zone	Location	Event Name	Event Type	Result
<input checked="" type="checkbox"/>	Thu May 3, 2018	8:00 AM - 12:00 PM	Eastern Time	GC - GC 125A	Test	Tour	

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



Concept: What are Services, Categories, and Resources?

In EMS, you may hear these terms used interchangeably sometimes, however, they are different concepts.

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

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Furthermore, a Category can be configured to "Use States" so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option



in EMS Desktop Client.

1. While creating a new reservation, navigate to the **Services** tab. The services your administrator has defined as available for the booking template and room(s) you selected are listed on the left panel.



Tip: If you are editing an existing reservation, click the **Add Services** option in the Reservation Tasks menu on the right, or open the Reservation Details and select the Services tab.

2. Click the **Services** dropdowns to expand and pick a service. You can add resources with service orders, catering (food) services, resources without service orders, setup notes and/or a room charge. You can add multiple services to a reservation and to a booking.

The screenshot displays the 'Room Request' interface for FIU. The top navigation bar shows 'Events - Indoors (ex: ballrooms, multipurpose)' and '1 Rooms', '2 Services', '3 Reservations'. The left sidebar lists 'Services For Your Reservation' including 'FIU Police', 'Event Personnel', 'GC - A/V Media Services', 'Computers & Peripherals', 'Pipe & Drape', 'Video/Sound', 'GC - Operations', 'Dance Floor', 'Partitions', 'Stage', 'Stanchions', and 'Round Tables'. The main area shows a 'Services Summary' table with items like 'MTS - Live Events', 'Audio Recorder', and 'Podium microphone'. Annotations highlight the sidebar, the summary table, a service dropdown, and a 'Next Step' button.



Concept: Options available in the Services dropdowns depend on several factors leading up to this stage in the booking process: your booking template parameters, setup type, and other rules set by your System Administrator.

3. Enter the necessary information for the services you are adding to the reservation.



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

Tip: You can add notes for each services you add to a reservation. These will only appear if you open the booking, and not in the Booking Summary.

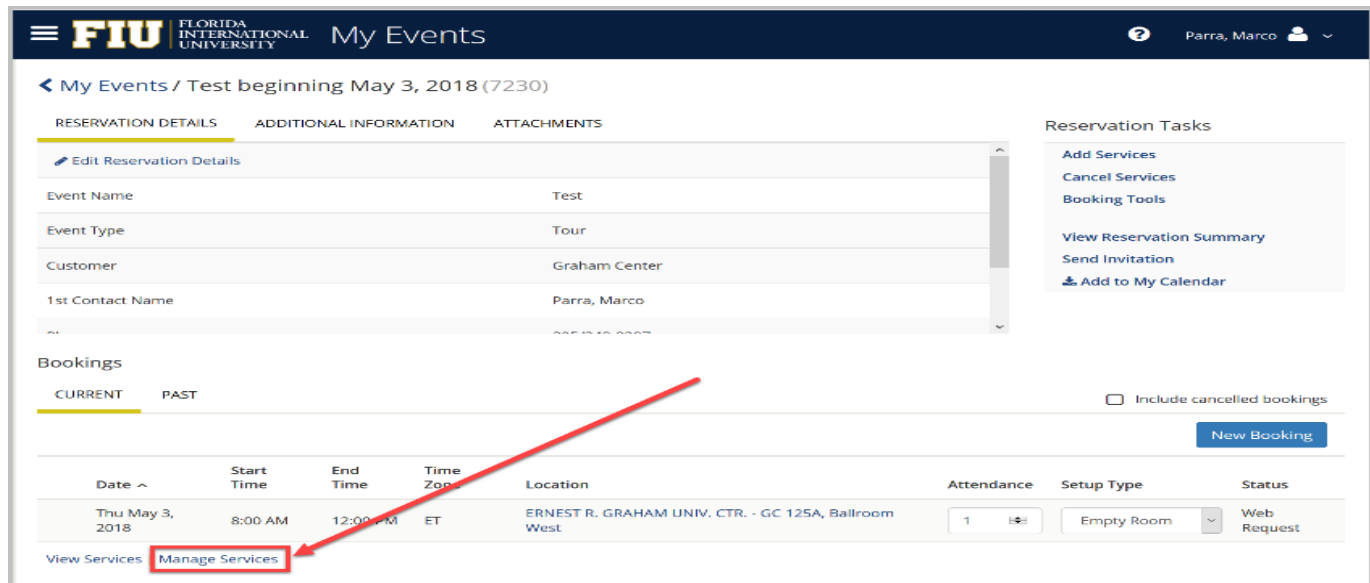
4. At the bottom of the page, click **Next Step**.

The Available Services tab closes. You advance to the Reservation Details tab.

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


CHANGING OR CANCELING SERVICES FOR AN EXISTING RESERVATION

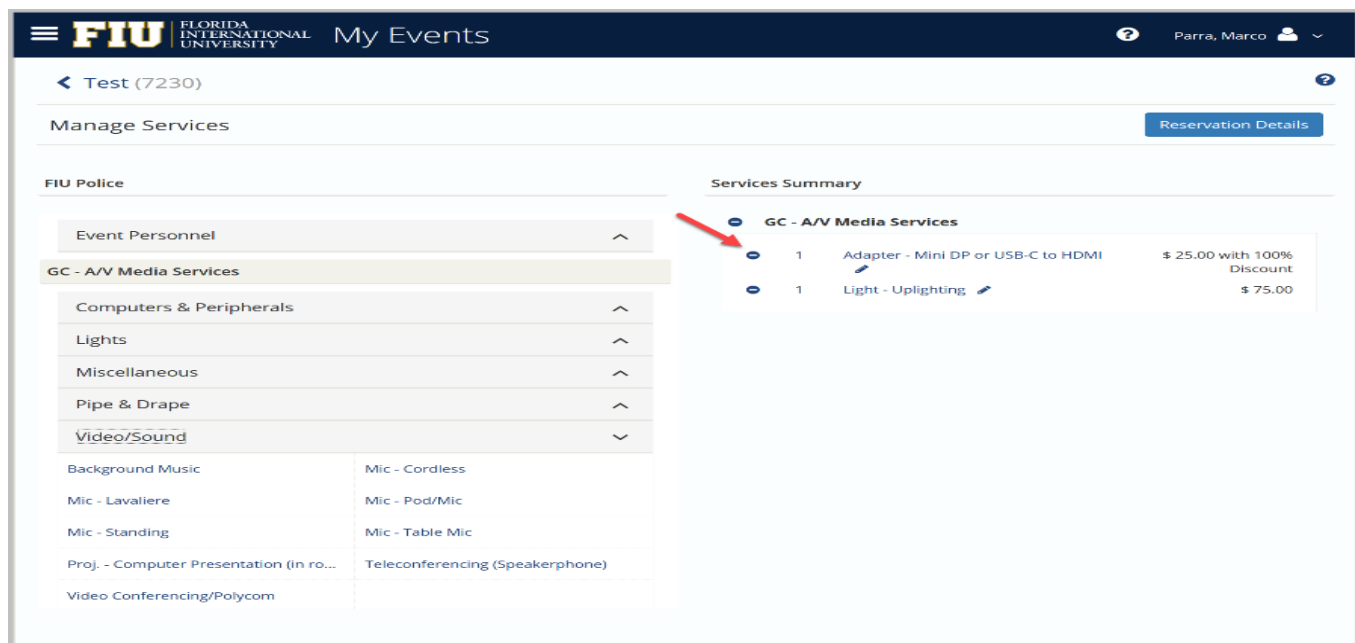
From an existing booking within one of your reservations, click the **Manage Services** option (if available) under the Bookings list. This enables you to change or cancel (delete) services for a booking, individually, per service item, or by service category.



The screenshot shows the 'My Events' page for a reservation titled 'Test' beginning on May 3, 2018. The page has tabs for 'RESERVATION DETAILS', 'ADDITIONAL INFORMATION', and 'ATTACHMENTS'. Under 'RESERVATION DETAILS', there is a link to 'Edit Reservation Details'. The 'Bookings' section shows a table with columns: Date, Start Time, End Time, Time Zone, Location, Attendance, Setup Type, and Status. A red arrow points to the 'Manage Services' link in the 'View Services' column of the first booking row.

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Thu May 3, 2018	8:00 AM	12:00 PM	ET	ERNEST R. GRAHAM UNIV. CTR. - GC 125A, Ballroom West	1	Empty Room	Web Request

On the Manage Services page that presents, you can subtract  services from the Services Summary view (if enabled). Services are listed in the right panel by category.



The screenshot shows the 'Manage Services' page for the 'Test' reservation. The page has tabs for 'Manage Services' and 'Reservation Details'. The 'Services Summary' panel on the right shows a list of services with minus icons for subtraction. A red arrow points to the minus icon next to the 'GC - A/V Media Services' category.

Category	Item	Quantity	Price
GC - A/V Media Services	Adapter - Mini DP or USB-C to HDMI	1	\$ 25.00 with 100% Discount
	Light - Uplighting	1	\$ 75.00



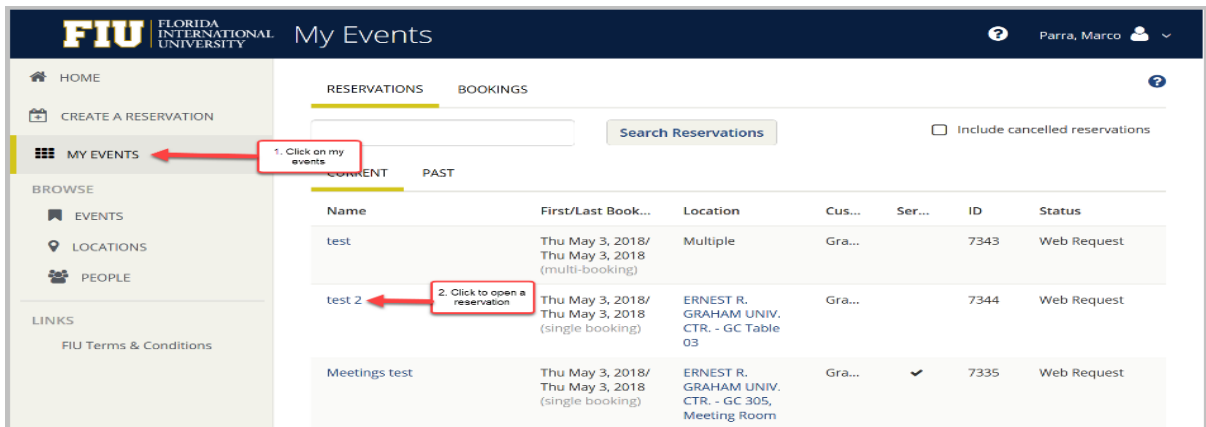
Note: The event type and the booking status (as well as your Administrator settings) affect whether the **Manage Services** option is available.

CANCELING YOUR RESERVATIONS AND BOOKINGS

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

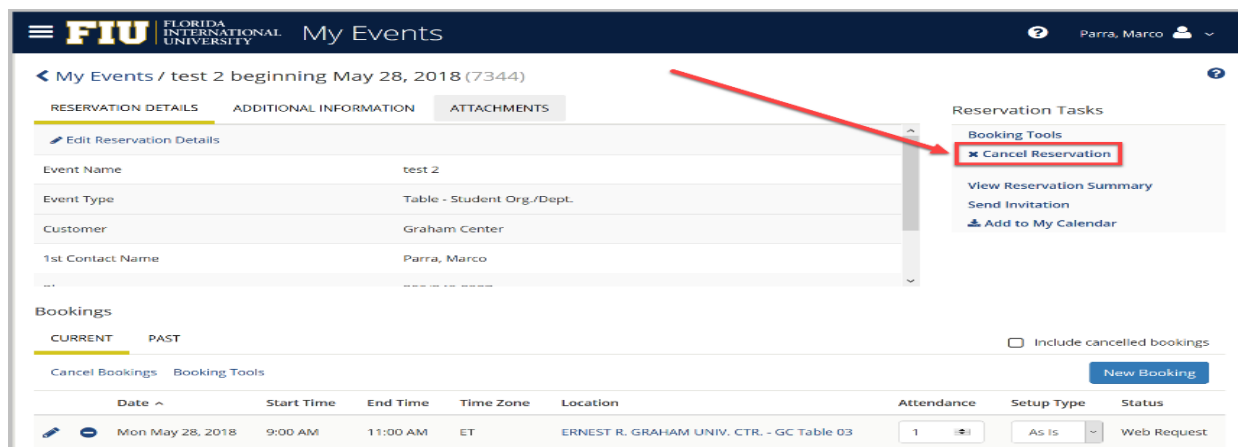
CANCELING RESERVATIONS

1. Navigate to the reservation with which you wish to work: click **MY EVENTS** on the main EMS Web App menu (or from the My Bookings area on MY HOME). Then click on a Reservation.



Tip: When you click to edit a Reservation or Booking, the page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.

2. From the Reservation Details page, click **Cancel Reservation**.



Warning: Canceling a reservation will also cancel all bookings under the reservation.

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

Cancel Reservation?

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


Cancel Reason

Cancel Notes

Yes, Cancel Booking No, Don't Cancel

3. Your MY EVENTS pages refreshes and the reservation is canceled.

CANCELING BOOKINGS

1. From the [ReservationDetails](#) page in the Booking area, to cancel a single booking, click the date of the booking or the **Remove** icon  next to the booking. (These options are available if your administrator has given you permission).

My Events

< My Events / test 2 beginning May 28, 2018 (7344)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Edit Reservation Details

Event Name test 2

Event Type Table - Student Org./Dept.

Customer Graham Center

1st Contact Name Parra, Marco

Bookings

CURRENT PAST

Cancel Bookings Booking Tools

Include cancelled bookings

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Mon May 28, 2018	9:00 AM	11:00 AM	ET	ERNEST R. GRAHAM UNIV. CTR. - GC Table 03	1	As Is	Web Request

Reservation Tasks

Booking Tools

Cancel Reservation

View Reservation Summary

Send Invitation

Add to My Calendar

New Booking



Tip: To cancel multiple bookings, click **Cancel Bookings** in the upper corner of your My Events list.

2. In the **Cancel Booking?** Popup that appears, select a **Cancel Reason** and add **Cancel Notes**, and then confirm that you want to cancel

Cancel Booking?

Monday, May 28, 2018, from 9:00 AM to 11:00 AM

test 2

ERNEST R. GRAHAM UNIV. CTR. - GC Table 03

Cancel Reason

Cancel Notes

Yes, Cancel Booking

No, Keep Booking

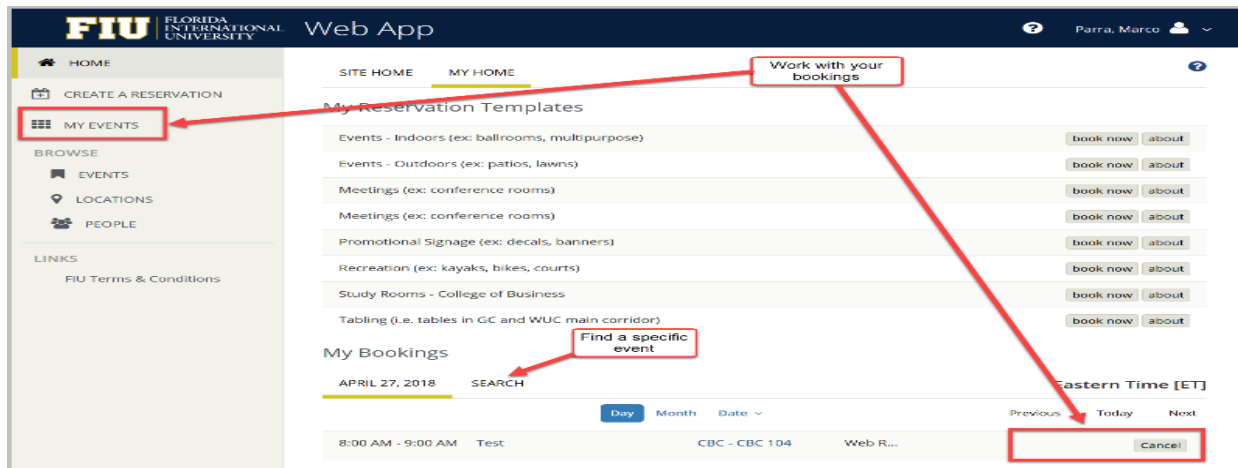
Your MY EVENTS page refreshes and the booking is canceled.

CHANGING RESERVATIONS AND BOOKINGS

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

CHANGING RESERVATIONS

1. Navigate to the reservation with which you wish to work: click **MY EVENTS** on the main EMS Web App menu (or from the My Bookings area on your homepage). Then click on the name of the Reservation.



Concept: Your Administrator defines room Setup Types and Event Types for you to choose from; this controls which services (if any) that you can add to the event.



Tip: When you click to edit a Reservation or Booking, the page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.

2. From the Reservation Details page, use the highlighted areas to work with the reservation.

My Events / Test beginning Apr 27, 2018 (7282)

RESERVATION DETAILS | **ADDITIONAL INFORMATION**

[Edit Reservation Details](#)

Event Name: Test
 Event Type: Study Session
 Customer: EMS_COB-Students
 1st Contact Name: Garcia, Deborah

Bookings
 CURRENT | PAST

[Cancel Bookings](#) | [Booking Tools](#)

Reservation Tasks
[Booking Tools](#)
[Cancel Reservation](#)
[View Reservation Summary](#)
[Send Invitation](#)
[Add to My Calendar](#)

☐ Include cancelled bookings

[Add another booking to this reservation](#)

[New Booking](#)

See room tables


Work with a booking

Work with the reservation

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Fri Apr 27, 2018	8:00 AM	9:00 AM	ET	COLLEGE OF BUSINESS COMPLEX - CBC 104, Study Room	1	As Is	Web Request

Important: When you finish editing a Reservation, be sure to confirm and save.

CHANGING BOOKINGS

1. From the Reservation Details page in the Booking area, click **Edit**  next to the booking. (These options are available if you have permissions).

My Events / Test beginning Apr 27, 2018 (7282)

RESERVATION DETAILS | **ADDITIONAL INFORMATION**

[Edit Reservation Details](#)

Event Name: Test
 Event Type: Study Session
 Customer: EMS_COB-Students
 1st Contact Name: Garcia, Deborah

Bookings
 CURRENT | PAST

[Cancel Bookings](#) | [Booking Tools](#)

Reservation Tasks
[Booking Tools](#)
[Cancel Reservation](#)
[View Reservation Summary](#)
[Send Invitation](#)
[Add to My Calendar](#)

☐ Include cancelled bookings

[Add another booking to this reservation](#)

[New Booking](#)

See room tables

Work with a booking

Work with the reservation

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Fri Apr 27, 2018	8:00 AM	9:00 AM	ET	COLLEGE OF BUSINESS COMPLEX - CBC 104, Study Room	1	As Is	Web Request

2. The Edit booking window appears, where you can make changes to the booking.



Tip: If the booking is one of a series, you can click the event name to navigate to the Reservation Summary page, and the **Edit** icon to see navigate directly to the Booking Details page.



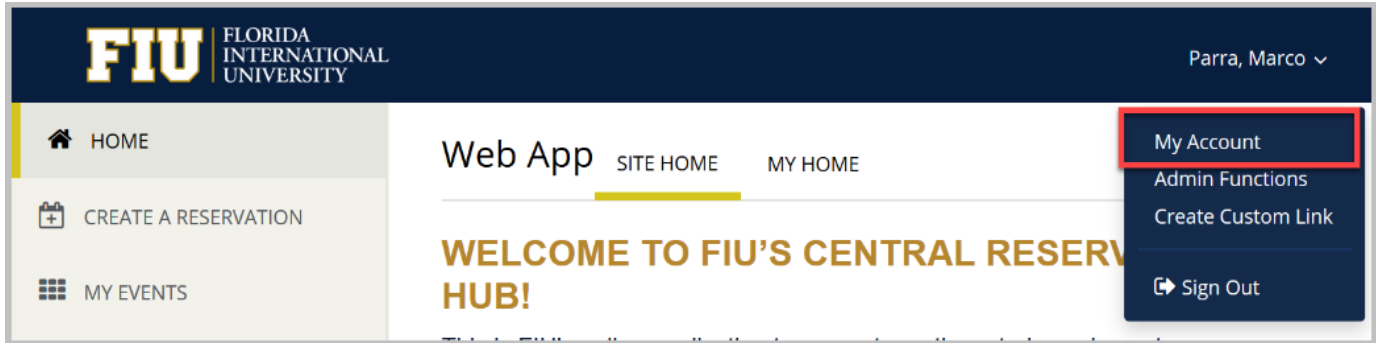
Important: When you finish editing a Booking, be sure to confirm and save.

PERSONALIZING YOUR ACCOUNT

The My Account menu enables you to customize your user profile:

- Create your own, timesaving *booking templates*, which set default values (Start Time, End Time, and so on) for your most frequent types of reservations and room requests. These templates appear on your personal Home Page after you save them.
- Set a list of *favorite rooms* to streamline your search for available space.

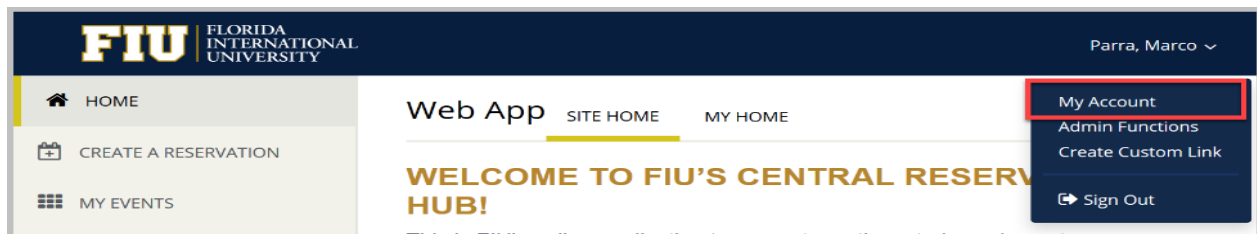
The My Account menu is available in the upper right corner of EMS Web App next to your name once you log in.



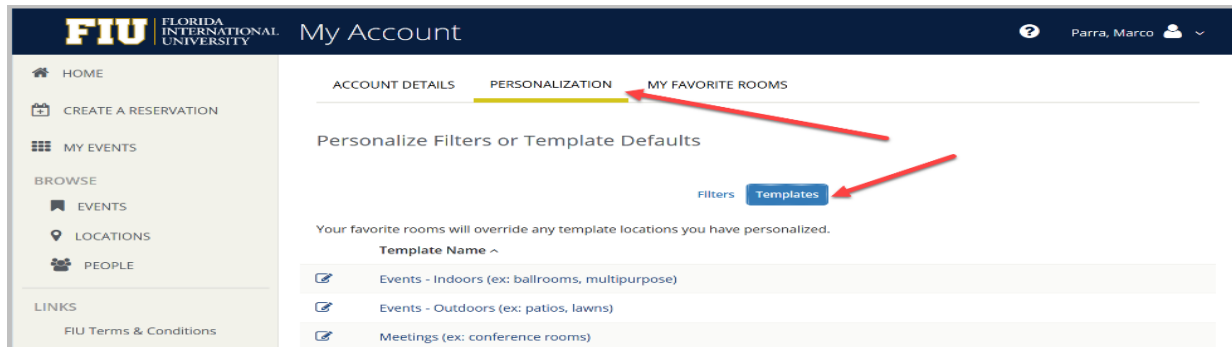
ESTABLISHING BOOKING TEMPLATES

You can personalize booking templates to streamline your process for requesting rooms and making reservations (depending on your permissions). These templates appear on your personal EMS Web App home page after you save them.

1. In the upper right corner of EMS Web App, click on the dropdown next to your name and select **My Account**.



2. From the My Account page, click **Personalization** and then click the **Templates** button.



3. You can change the default values for a template only if your administrator has set your permissions accordingly: select the template you wish to change. The lower section changes to show options for the selected template



Concept: Essentially, your settings here automatically populate field values and filter search results when you make room requests, so for instance, setting a Start Time here will set a start time for any room request you make using this template; setting a Setup Type will filter search results to only show rooms with that setup type.

My Account

Events - Indoors (ex: ballrooms, multipurpose)

Start Time

8:00 AM

End Time

12:00 P

Display Results As

☐ List
 ☐ Schedule

Locations

(all)

Add/Remove Locations

☐ Override location and time zone settings when I search for available space

Floors

(all)

Add/Remove Floors

Room Types

(all)

Add/Remove Room Types

Time Zone

Eastern Time

Setup Type

{no preference}

Event Name

Event Type

Save Changes



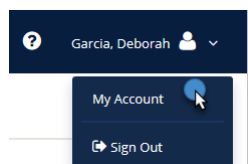
Tip: If you select the **Override location and time zone settings when I search for available space** option under Locations, this means that whenever you book using this template, you can change the default location for this template during the booking process. For example, if your template Location was Denver and during booking, you added Kansas, the template would be updated to Kansas going forward.

- When you have finished making changes, click **Save Changes**.

FAVORITING ROOMS

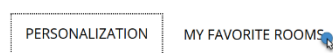
Under My Account, you can create a list of favorite rooms. This streamlines the process of searching for available space when you request or reserve rooms.

1. Under the dropdown arrow next to your name in the upper right corner of EMS Web App, click **My Account**.

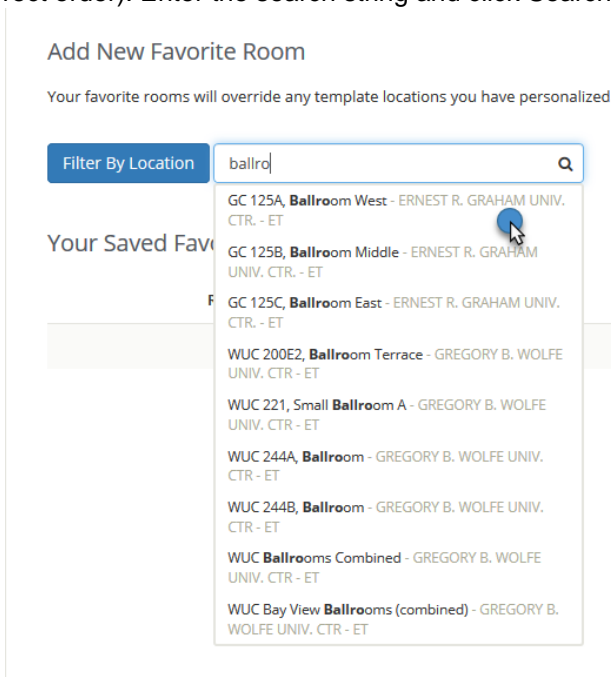


The User Options page opens, showing tabs along the top where you can customize your user profile.

2. Click the FAVORITE ROOMS tab to work with a list of your favorite rooms. Any rooms you have already saved as favorites are listed under Your Saved Favorite Rooms.



3. In the Search field, you can search for room you wish to favorite (your search string is not case-sensitive but characters must be in the correct order). Enter the search string and click Search results will display below.



4. To add a favorite to the list, select it from the search results. The room is added to Your Saved Favorite Rooms. When you book a room in EMS Web App, you can now choose more quickly from your Favorites list.

Add New Favorite Room

Your favorite rooms will override any template locations you have personalized.

Filter By Location

Find by room name


Q

Your Saved Favorite Rooms

Room Name ^	Building	Room Type
<div><div></div>GC 125A, Ballroom V</div>	ERNEST R. GRAHAM UNIV. CTR.	Ballroom
<div><div></div>GC 125B, Ballroom Middle</div>	ERNEST R. GRAHAM UNIV. CTR.	Ballroom
<div><div></div>GC 125C, Ballroom East</div>	ERNEST R. GRAHAM UNIV. CTR.	Ballroom



Tip: Once you have established favorites, EMS Web App uses these to filter your search results when you search for available space during the reservation process.

To remove a favorite, click  next to the room in Your Saved Favorite Rooms.

- **How do I search for available space? What if I only want to make a reservation if a specific room is available?**

Use the BROWSE options from the main menu.

- **Why can't I make a reservation?**

Several settings control your capabilities as a user.

- **Why are some options not available to me?**

This is probably because of settings controlled by your Administrator.

- **Can I let someone else make reservations on my behalf?**

If enabled by your Administrator, you can "delegate" to other users. They will then opt to "act as" you from their My Account menu.

- **How do I check if a room I want is available? How do I check a person's availability when making a reservation?**

Start at the My Home page and Browse Events, Locations, People.

- **How do I add Services to a booking?**

You can add them during the initial booking process or by editing it later. Services, Resources, and Categories interact as part of the booking details for an event.



Concepts: Booking Templates, Requests, and Reservations

Booking Templates

Your Administrator creates different Booking Templates for different purposes. For example, your Administrator could make one template for individual workspaces, another template for meeting rooms without services like catering, and yet another template for meetings with services.

For each template, your Administrator can enable some fields and disable others. For example, your Administrator could set up a "meeting room with services" template that requires you to enter a purchase order number to pay for the services.

You can set up default values of the templates that are available to you so that you can more quickly make your reservations. For example, if you book a workspace every day from 8:30am to 4:30pm, you can set up these times as default values so that you don't have to enter them every time. (You can override them anytime you need to.)

To set up default values for your templates, go to My Account and then to the Personalization tab.

Requests vs. Reservations

Depending on your permissions, you may Request a Room or Make a Reservation. Room requests require approval from a supervisor and are visible to other users so they know the space has been tentatively booked. The EMS Web App behaves differently for each type of user, showing fewer options (and usually, less information) for those who can only request rooms.

MY EVENTS VS. BROWSE EVENTS



Important: If you logged in as a guest, you will only have permissions to request reservations, therefore the MY EVENTS option will not be available.

What is the Difference Between MY EVENTS and BROWSE EVENTS?

These two menu options on the left side of the EMS Web App enable you to accomplish different tasks:

MY EVENTS = Reservation Management

Clicking this area displays all reservations and bookings linked to your profile, and enables you to manage your reservations, change details, and create new bookings.

BROWSE EVENTS = Explore the Schedule

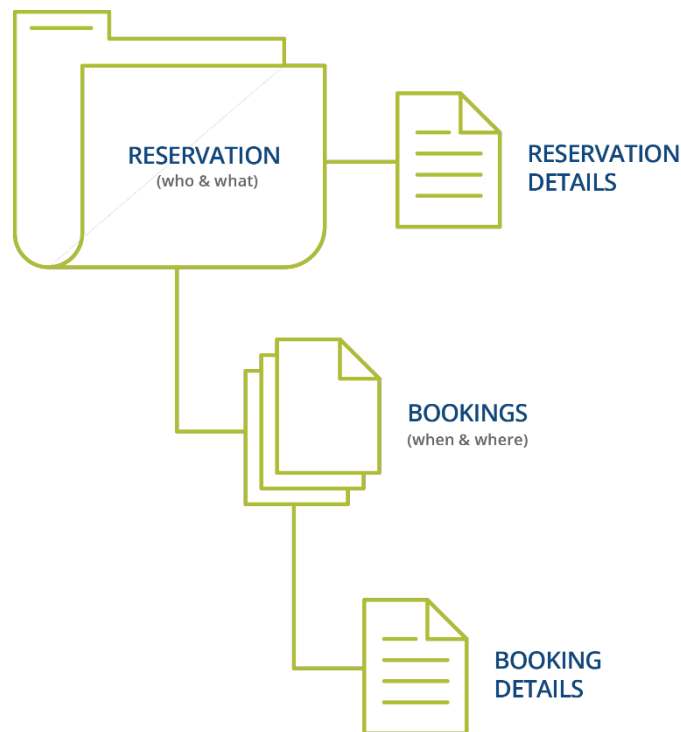
Clicking this area provides a view of events on the calendar for you and all users in your organization. This view helps you locate available time slots for space before requesting or making a reservation.

RESERVATIONS, BOOKINGS, AND BOOKING DETAILS

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

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

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



Reservations: Who and What

A *reservation* is the "who and what" of an event. For example, the Academic Planning Board (the who) may reserve space for a Semester Kickoff event (the what).

BOOKINGS: WHERE AND WHEN

A *booking* is the "where and when" of an event. For example, the Academic Planning Board schedules the conference room (the where) for a staff meeting on the second Monday in January (the when). The Academic Planning Board now has a single reservation with a single booking in EMS. If, however, they schedule the conference room (the where) for a staff meeting on the second Monday of each month for a year (the when), then the board now has a single reservation with 12 bookings.

BOOKING DETAILS

A booking can have one or more booking details associated with it. *Booking details* are the resources (items for the meeting) or services (people and their activities) that are needed for an event, the notes for the event, the activities for the event, the room charges for the event, or any combination of these. For example, for the Academic Planning Board's staff meeting, the resources could include catering (coffee service, bagels and muffins, and so on) and A/V equipment, plus the services of a person bringing in and setting up a projector, moving a speaker's podium, and so on).

Service Orders

System Administrators configure "buckets" of these details as "Categories," which streamlines the process of adding details to bookings.



Concept: Services, Categories, and Resources: What's the Difference? (click to expand)

In EMS, you may hear these terms used interchangeably sometimes, however, they are different concepts.

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

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

Furthermore, a Category can be configured to "Use States" so that when a service is requested with a meeting, it can be managed through a review and approval process in the Manage Services toolbar option



in EMS Desktop Client.

UNDERSTANDING EVERYDAY USER TEMPLATES

Why are some features in EMS unavailable to me? Why can't I book a room?

Your Administrator controls what you are able to do and view in EMS using "everyday user templates" based on your user profile. The options and information you can see in EMS depends on your security access, user type, and many other administrative controls.

Additionally, your capabilities are also controlled by your "booking templates" and permissions.