



Web App Reference Guide for EMS

About this guide	1
Navigating the EMS Web App	2
Making Reservations	3
Single Reservation	3
Recurring Reservation	7
Cancelling a Reservation	8
Editing a Reservation	9
Adding Services to an Existing Reservation	10
Browsing	11
Events	11
Locations	12

About this guide

This guide is designed to be a quick reference for common tasks within the EMS Web App. For more details about how to make or edit reservations, see an EMS Administrator.

Navigating the EMS Web App

Your EMS Web App home page looks like below.

- On the left, you have a menu bar with the following options:
 - Create a Reservation:** takes you to your reservation templates
 - My Events:** takes you to your event list of upcoming and past events in EMS
 - Browse:** takes you to the search features in the Web App
 - Events:** See all events in your organization
 - Locations:** See the free/busy of all the rooms in your organization
- On the main section of the page, you see **My Reservation Templates**, which allows you to make a quick booking right from your home page.
- Below that is a list of your bookings for the day along with a search option to find your reservations.
- Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.

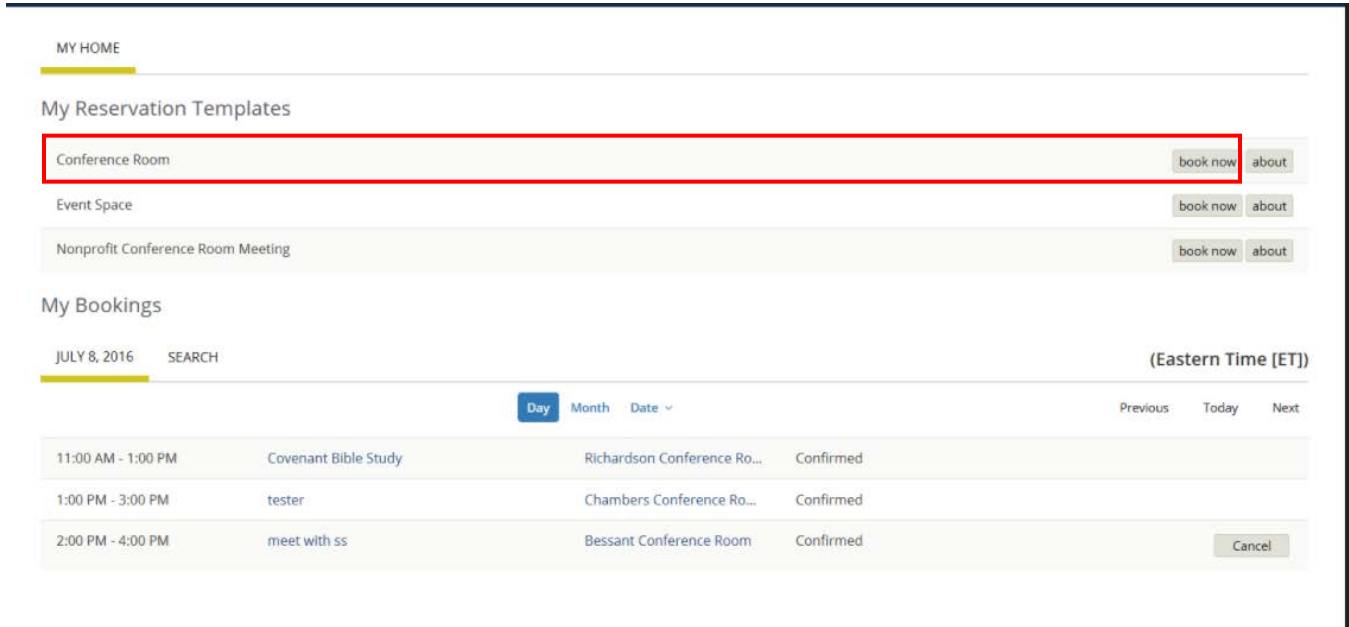
The screenshot shows the EMS Web App interface. Callout 1 points to the left-hand navigation menu with options: HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, LOCATIONS, and PEOPLE. Callout 2 points to the 'My Reservation Templates' section, which lists 'Conference Room', 'Event Space', and 'Nonprofit Conference Room Meeting', each with 'book now' and 'about' buttons. Callout 3 points to the 'My Bookings' section for 'JULY 8, 2016', showing a table of reservations. Callout 4 points to the top right corner showing the user's name 'Sara Rae' and a profile icon.

Time	Event Name	Location	Status	Action
11:00 AM - 1:00 PM	Covenant Bible Study	Richardson Conference Ro...	Confirmed	
1:00 PM - 3:00 PM	tester	Chambers Conference Ro...	Confirmed	
2:00 PM - 4:00 PM	meet with ss	Bessant Conference Room	Confirmed	Cancel

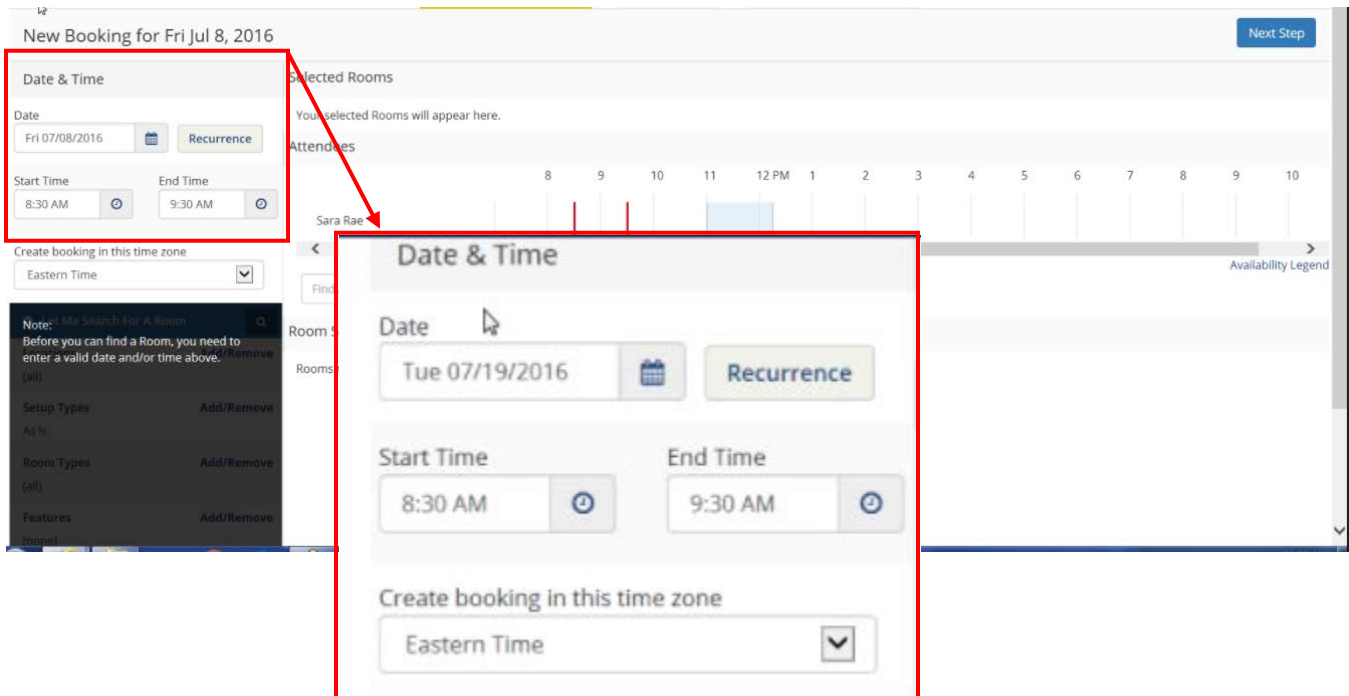
Making Reservations

Single Reservation

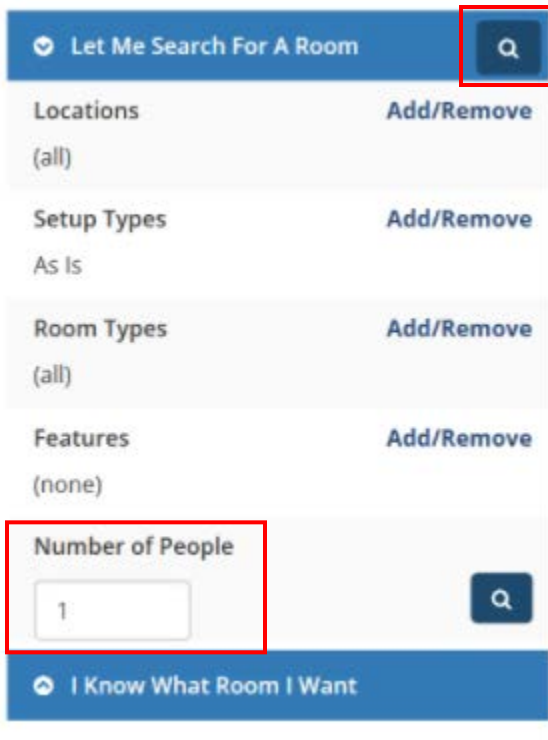
1. To make a reservation, begin at either **My Home** or **Create Reservation**
2. Click **book now** next to the template you wish to use
 - ***NOTE** – The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The **about** button will tell you the rules of the template.



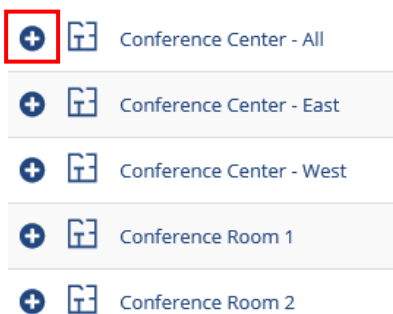
3. Select your date and time



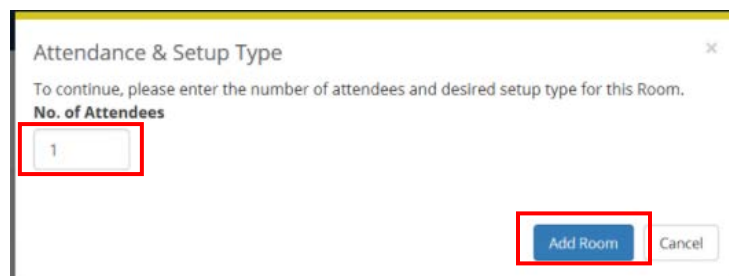
4. Select any filters to limit the number of rooms returned.
5. Enter the **Number of People** to find a room that will best fit the size of your meeting.
6. Click the magnifying glass to get your list of available rooms.
***NOTE** – If you don't wish to enter any filtering, you can click on the top magnifying glass for a quick search of all spaces



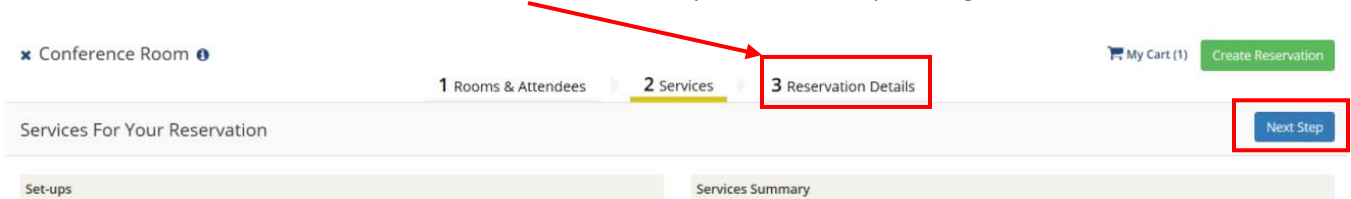
7. Select a room by clicking on the blue + next to the room name
***NOTE** – clicking the room name will give you the room details



8. Enter the number of attendees and desired setup (if prompted)
9. Click **Add Room**



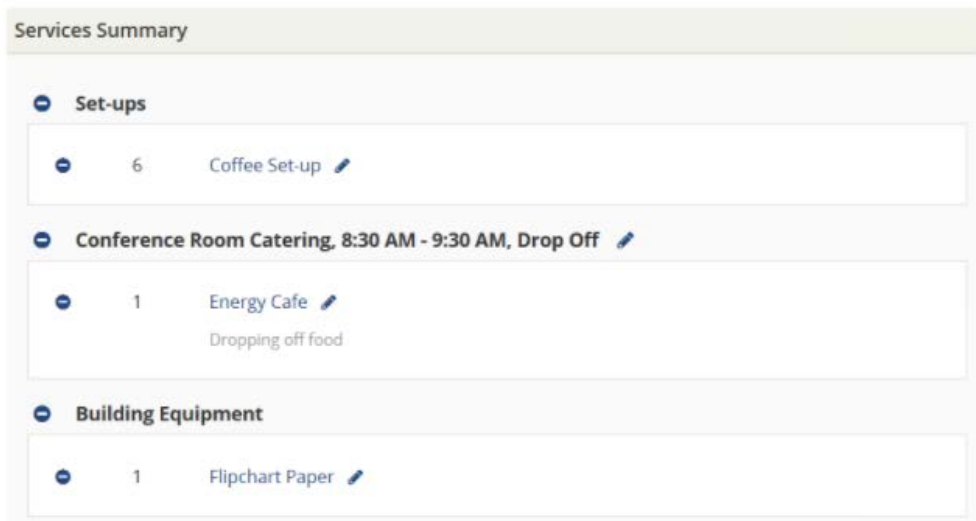
- You can click the **Next Step** button at the top right of the screen to add services
 *NOTE – You can click on **3 Reservation Details** if you want to skip adding services



- If you choose to add services, click on the resource you wish to add and enter the quantity of the resource you need and any special instructions (if needed).
- Click **OK** when done adding the resource



- A summary of your services will build on the right side of the screen



- Click **Next Step** to enter your reservation details



15. Enter your **Event Details**

***NOTE** – Anything with an ‘*’ next to it is a required field.

16. Add the **Host** Details – this is who will be hosting the event.

a. Your information will be in the drop-down menu

17. **1st contact** – this is the contact for the event (if it is someone different than the Organization/Individual)

Host Details

Host *

Johnson, John
▼

Q

1st Contact

Jacobs, Mark
▼

Q

1st Contact Phone

123-456-7890

1st Contact Fax

1st Contact Email Address

email.address@EMSSoftware.com

18. Add any additional information (questions will vary depending on the template chosen)

19. Add **Billing information**

20. Click **Create Reservation**

21. You will be directed to a success page where you can immediately edit the reservation if needed.

Reservation Created

Reserved!

What would you like to do now?

> Edit this reservation.

Recurring Reservation

1. Go to **Create Reservation**
2. Choose your template and click **book now**
3. When choosing your date/time, select the **Recurrence** button
4. Enter your recurrence details and click **Apply Recurrence**

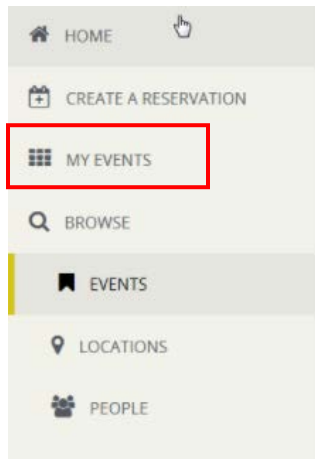
The screenshot shows the 'New Booking for Fri Jul 8, 2016' interface. The 'Date & Time' section has a 'Recurrence' button highlighted with a red box. A red arrow points from this button to a 'Recurrence' modal window. The modal window is titled 'Recurrence' and contains the following fields: 'Repeats' set to 'Weekly', 'Every' set to '1 week(s)', 'On' set to 'Wed', 'Start Date' set to 'Wed 07/13/2016', 'End Date' set to 'Thu 07/14/2016', 'End after' set to '5 occurrence(s)', 'Start Time' set to '1:00 PM', and 'End Time' set to '2:00 PM'. The 'Apply Recurrence' button at the bottom right of the modal is also highlighted with a red box.

5. Enter your filtering criteria and click the magnifying glass to search for rooms
6. A list of open rooms will appear with the availability listed in the second column (see below 5/5 means the room is open for 5 out of the 5 requested dates)
7. Click the **blue + icon** to add the room you wish to book.

	Collaboration Room 1	5/5	New York - 345 Park Ave. (V)	(none)	ET	50	
	Collaboration Room 2	5/5	New York - 345 Park Ave. (V)	(none)	ET	60	
	Collaboration Room 3	5/5	New York - 345 Park Ave. (V)	(none)	ET	40	
	Collaboration Room 4	5/5	New York - 345 Park Ave. (V)	(none)	ET	30	
	Conference Room 4	5/5	New York - 345 Park Ave. (V)	(none)	ET	40	

8. Complete the reservation as outlined in [Single Reservation](#) above.

Canceling a Reservation



1. Go to **My Events**
2. This will take you to your list of events.
3. Click on the **Reservation Name** you wish to cancel

4. Click either **Cancel Reservation** on the right side (cancels all bookings) OR
5. Click the **cancel icon** next to the booking (cancels that booking only)

My Events / Meeting beginning Nov 30, 2017 (77603)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Meeting Name	Meeting
Meeting Type	Meeting - Internal
Host	Hawkins, Billie
1st Contact Name	Lima, Sam
Phone	303-850-2622


Reservation Tasks

- Add Services
- Cancel Reservation**
- View Reservation Summary
- View Service Availability
- Send Invitation
- Add to My Calendar

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools New Booking

Date ^	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
 Thu Nov 30, 2017	4:00 PM	5:00 PM	ET	New York - 345 Park Ave. (V) - Collaboration Room 3	1	Conference	Confirmed

6. You will be asked to confirm your cancellation

Cancel Booking? x

Thursday, November 30, 2017, from 4:00 PM to 5:00 PM

Meeting
New York - 345 Park Ave. (V) - Collaboration Room 3

Cancel Reason

Meeting Cancelled

Cancel Notes

Editing a Reservation

1. From your home page, click on **My Events**
2. Click on the **Reservation Name** you wish to edit
3. You can edit **Reservation Details** (Event Name, Event Type, Organization/Individual, First Contact) by clicking on the pencil icon next to the Reservation Details.

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

[Edit Reservation Details](#)

Event Name	Study Session
Event Type	Staff Only Daytime
Organization/Individual	Sara Rae
1st Contact Name	(none)

Reservation Tasks

- Add Services
- Cancel Services
- Booking Tools
- Cancel Reservation
- View Service Availability

4. You can edit the booking by clicking on the pencil icon next to the booking.

Bookings

CURRENT PAST Include cancelled bookings

Cancel Bookings Booking Tools [New Booking](#)

Date	Start Time	End Time	Time Zone	Location	Attendance	Setup Type	Status
Edit Thu Nov 30, 2017	4:00 PM	5:00 PM	ET	New York - 345 Park Ave. (V) - Collaboration Room 3	1	Conference	Confirmed

5. You can select a new Date, Time or Location by using the search tools to the left.
6. If the room is open for your new date or time, click **Update Booking** to change your information.

Edit Booking Thu Nov 30, 2017 [Update Booking](#)

Meeting Details Room Search Results Attendance & Setup Type

Meeting Name *
Meeting

Meeting Type *
Meeting - Internal

Date & Time

Date
Thu 11/30/2017

Start Time
4:00 PM

End Time
5:00 PM

[Update Booking](#) Cancel

Room Search Results LIST SCHEDULE FLOOR MAP

Favorite Rooms only.

Find A Room Search

Rooms You Can Reserve

New York - 345 Park Av... Cap	5 AM	6	7	8	9	10	11	12 PM	1	2	3	4	5	6	7	8	9
Collaboration Room 3	40											Meeting					

Availability Legend

Adding Services to an Existing Reservation

1. To add services to an existing booking, go to **My Events**
2. Select the **Reservation Name** to which you wish to add services
3. Click the **Add Services** link

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS | ADDITIONAL INFORMATION | ATTACHMENTS

[Edit Reservation Details](#)

Event Name	Study Session
Event Type	Staff Only Daytime
Organization/Individual	Sara Rae
1st Contact Name	(none)

Reservation Tasks

- Add Services**
- Cancel Services
- Booking Tools
- ✖ Cancel Reservation
- View Service Availability

4. Select the service and quantity you wish to add (A summary will display on the right of the screen)
5. Click **Next Step**

Study Session (188)

Select Services [Next Step](#)

Rental Notes

Conference Room Catering

Services Summary

- Building Equipment
 - 1 Whiteboard / Easel

6. Identify the bookings to which you wish to add the service (for recurring reservations, you can add the service to multiple bookings at the same time).

Select Services / Study Session (188)

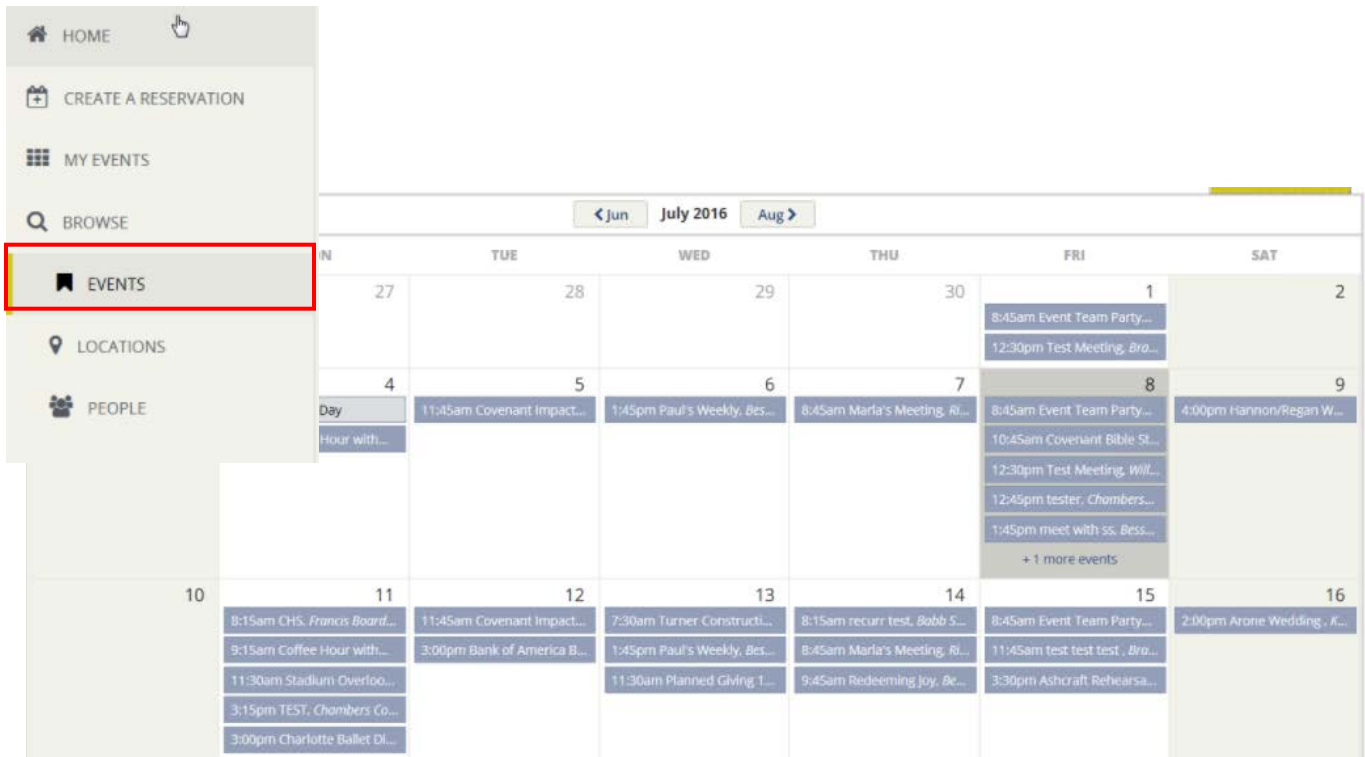
Add Services [Add Services](#)

<input type="checkbox"/>	Date ^	Booking Time	Time Zone	Location	Event Name	Event Type	Result
<input checked="" type="checkbox"/>	Tue Jul 12, 2016	9:30 AM - 10:30 AM	Eastern Time	Babb Study/CT Project Room	Study Session	Staff Only Daytime	

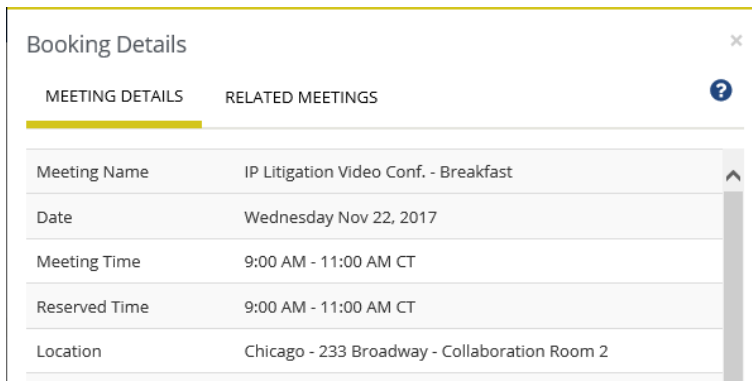
Browsing

Events

Browse events allows you to see all reservations in your organization. This will link you to a reservation calendar.

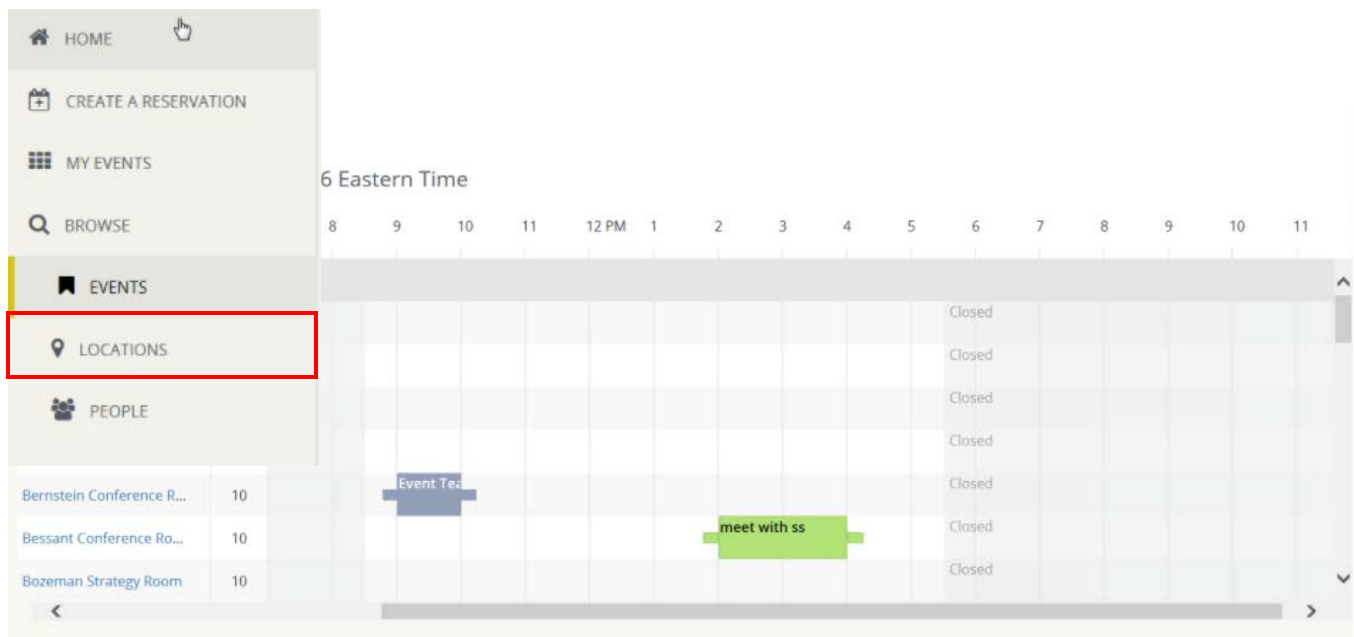


If you click on a reservation, you will get details about that reservation including any related booking (other rooms booked or future occurrences of a recurring reservation).



Locations

Location will show you a free/busy of all spaces.



You can make a reservation from any open spot by clicking and dragging your mouse from the start to the end time of an open slot. Select your Template and click continue to complete the reservation.

