EMS DESKTOP CLIENT

Configuration Guide

V44.1

Last Updated: January 16, 2018

 © 2018 EMS Software, LLC. All Rights Reserved.

Table of Contents

EMS DESKTOP CLIENTConfiguration Guide 1

Table of Contents 2

Starting EMS 36

Overview of EMS Desktop Client Configuration 40

Authentication Options for EMS Desktop Client 42

Integrated Windows Authentication 42

LDAP 43

The EMS Main Window 44

Menu Bar 45

Toolbar 46

Customizing the Toolbar 47

Main Menu 49

The EMS Browser Window 51

Grouping Data by Columns 53

Rearranging Columns 54

Changing Column Width 54

Using the Context Menu 55

Filtering Data 56

Changing the Sort Order of Data 60

Configuration > Facilities 61

Overview of Configuring Rooms 64

Standard and Combination Rooms 65

Override Rooms 70

Configuring Rooms 71

Basic Elements for Configuring a Room 74

EMS Web App Settings 81

Notes or Alerts for a Room 84

Configure Calculations for a Room 85

Configure Pricing for a Room 86

Set Setup Types for a Room 91

Set Components for a Combination Room 92

Set Features for a Room 93

Exclude Resources for a Room 94

Add Attachments to a Room 95

Add an Image for a Room 96

Add Drawings for a Room 97

Set Values for User Defined Fields (UDFs) for a Room 98

Assign the Room to an Everyday User Process Templates 98

Room Configuration Wizard 100

Using the Room Configuration Wizard 101

Configure Features for Multiple Rooms 106

Exclude Resources for Multiple Rooms 107

Configure Common Setup Types for Multiple Rooms 108

Configure Common UDFs for Multiple Rooms 108

Configure Room Pricing 110

Configure Override Rooms 118

Configure and Generate Room QR Codes 120

Enable Room Cards for Rooms 120

Run the Room Card - QR Code Report to Generate QR Codes 122

Import Rooms 128

Configuring Buildings 130

Configure a Building 130

Restrict a Building to Specific Categories 135

Associate an Image With a Building 136

Set Values for the User Defined Fields (UDFs) 138

Specify Unregistered Attendee/Visitor Behavior 139

Configuring Building Hours 143

Building Hours Wizard 149

Configure Areas 155

Configure Room Types 160

Configure an Override Room 162

Configure Setup Types 163

Configuring Features 166

Configuring Floors 169

Configuring Floor Plans 172

Configure Floor Plan Indicators 173

Configure a Floor Plan Diagram 176

Map a Floor Plan 179

Configure Public Views 182

Configuration > Resources 187

Overview 187

Categories, Resources, and Services: What's the Difference? 190

Configuring Resources for a Category 192

Configure Resources for a Category 193

Assign Calculations to a Resource 203

Configure Pricing for a Resource 205

Associate an Image with a Resource 210

Edit Production Items for a Resource 212

Exclude Rooms for a Resource 214

Create a Package for a Resource 216

Resource Configuration Wizard 219

Importing Resources for a Category 228

Define Resource Selections and Selection Items 232

Configure Services for a Category 240

Configuring Groupings for a Resource 246

Define Production Areas and Production Items for a Catering Resource 252

Define a New Production Area 257

Define a New Production Item. 260

Configure the Pricing for a Resource on the Edit Pricing Window 262

Export Pricing Information for a Resource 272

Configuration > Billing 278

Overview 278

EMS Billing Concepts 279

Rate Schedules 279

Rate Schedules and Billable Items (rooms and resources) 281

Calculations 282

Pricing Plans 283

Configure Rate Schedules 289

Configure a Rate Schedule: 291

Configure Pricing for Billable Items in a Rate Schedule 293

Configure Pricing Plans 301

Export Pricing Information for Billable Items (Rooms or Resources) 306

Configure Calculations 311

To configure calculations 315

To assign calculations 319

Configure Accounts 324

To Configure Accounts 325

Configure Payment Types 328

Configure Sales Categories 331

Configure Billing Reference and PO Numbers 334

Establish Billing Reference and PO Behavior 340

Globally Set Behavior for All Reservations 342

Set Behavior for a Booking Template 344

Set Behavior for a Category 347

Set Behavior for a Service 351

Set Behavior for a Room to Prompt Users for a Billing Reference 354

Configure Currencies 355

Configuration > Administration 359

Configure Categories 360

Enable Visitor Management 381

Configure a Category for Visitors 382

Configure Departments 386

Configure Statuses 393

To configure statuses 394

Configure Notification Rules 401

To Configure a Notification Rule 403

Booking Notification Rules 406

Service Order Notification Rules 409

Notification Rules for Anything On A VIP Event 411

New Everyday Users Notification Rules 411

User Defined Field Notification Rules 412

Select Users to Notify 413

Selecting Rooms Requiring Notifications 416

Select Booking Statuses Requiring Notifications 418

Select Event Types Requiring Notifications 419

Copy a Notification Rule 421

Types of Notification Rules 422

Booking Notification Rules 422

Service Order Notification Rules 424

Notification Rules for Anything On A VIP Event 426

New Everyday Users Notification Rules 426

User Defined Field Notification Rules 427

Configure Group Notification Rules 429

Configure a Group Notification 430

Set the Confirmation Rules for a Group Notification Email 440

Configure Check-in Notification Rules (Excludes Professional) 447

Configure Room Card Formats 457

Configure Calendar Formats 461

Configure Reservation Wizard Templates 467

To Configure the Reservation Wizard Template 468

Set Default Event Information for a Reservation Wizard Template 472

Set Default Room Features for a Reservation Wizard Template 474

Set User-Defined (UDF) Field Values for a Reservation Wizard Template 475

Configuration > Other 478

Configure Event Types 479

To configure event types 479

Configure Group Types 487

To configure group types 487

Configure Reminder Types 492

To Configure a Reminder Type 492

Configure Comment Types 498

Configure Messages 504

Configure Special Dates or Holidays 509

Work With Special Dates or Holidays 510

Configure a Single Special Date or Holiday 512

EMS Web App Settings 514

Configure Multiple Special Dates or Holidays 514

Import a List of Special Dates or Holidays 517

Configure Building Hours for a Special Date or Holiday 519

Configuring User Defined Fields (UDFs) 524

Configure User Defined Fields (UDFs) 525

User Defined Field Options 528

Dependency 532

Value 533

EMS Web App Settings 533

UDF Field Types 536

Date UDF 536

List UDF 536

Numeric UDF 537

Text UDF 538

Configure Reservation Sources 539

To configure a reservation source 539

Configure Cancel Reasons 542

Configure Attachment Types 546

To configure an attachment type 547

Configure Word Merge Documents (Optional Module) 550

Create and Tag a Word Document 551

Add the Tagged Word Document to Your EMS Database 552

Configure Calendar Styles 556

To configure calendar styles 556

Configuration > Everyday User Applications 560

Configure Everyday Users 563

Licensing for Everyday Users 573

Emailing an Everyday User 575

Configure Groups and Contacts from an Everyday User 577

Configure a Group from a User 579

Configure a Contact from a User 580

Assign Templates to Everyday Users 587

Configure Everyday User Process Templates 592

Web Template Tab 599

Booking Rules Tab 605

Defaults Tab 609

Video Conference Tab 611

Rooms Tab 613

Category Tab 615

Event Type Tab 617

LDAP Groups Tab 619

User-Defined Fields (UDF) Tab 621

Parameters Tab 623

Web Text Tab 625

Menu Text Translations Tab 627

Terms and Conditions Tab 628

Configure Everyday User Security Templates 630

Entering Security Template Settings 633

Assigning Roles to Users 635

Setting Tooltip Display 638

Finalizing the Template 638

Everyday User Security Template Field Definitions 640

Security Tab 640

Roles Tab 641

Assign Security Templates to Multiple Everyday Users 645

Configure EMS Web App Menus 650

Configure Help Text 656

Configure Help Text in the EMS Desktop Client 657

Configuring Help Text in the EMS Web App 660

Enable the Custom Help Text Feature 661

Navigate to Pages in EMS Web App and Customize Help Text 663

Configure Web Text 667

Configure Web Text in EMS Desktop Client: 667

Configure Language Translations 671

Build Your Language Translation Spreadsheet 672

Configure Your Language Translations in EMS Desktop Client 675

Configure Confirmation Behavior for Everyday User Applications 679

Create Templates for Desks and Workspaces 684

Everyday User Process Template Field Definitions 688

Process Template Tab 690

Additional Tabs for Booking Template Configuration 698

Booking Rules Tab 698

Booking Rules Tab: Booking Requirements Area 700

Booking Rules Tab: Booking Days Area 702

Defaults Tab 705

Video Conference Tab 706

Rooms Tab 706

Categories Tab 707

Event Types Tab 708

LDAP Groups Tab 708

User Defined Fields Tab 709

Parameters Tab 709

Help Text Tab 712

Menu Text Translations Tab 712

Terms and Conditions Tab 713

How Do I Allow Invitations on a Booking Template? 714

Configuration > Kiosk 715

Configure EMS Kiosk App Profiles 716

Navigate to the Kiosk Profiles Area 717

Kiosk Profile Tab 718

Rooms Tab 722

Menu Items Tab 724

Translations Tab 725

Images Tab 727

Parameters Tab 729

Parameters No Longer Used by Current Version of the EMS Kiosk App 731

Help Text Tab 733

Configure EMS Kiosk App Menus 738

Configure Groups (Toolbar Icon) 741

Configure Groups 742

Search for a Group and/or Contact 743

Configure Groups 748

Configuring Additional Information for a Group 763

Create an Everyday User from a Group 764

Assign a Group to an Everyday User 769

Assign Calculations to a Group 771

Configure a List of Billing Reference Numbers 774

Configure a List of PO Numbers 777

Edit Group Information 780

Edit Group Information 781

Edit Summary, Billing, and/or Other Group Information 782

Edit the Contacts for a Group 790

Edit the Calculations for a Group 794

Edit the Billing Reference Numbers for a Group 796

Edit the PO Numbers for a Group 798

Edit Everyday Users for a Group 799

Import Groups 802

Configure Contacts 804

Configure Contacts 805

Manually Configure Contacts 806

Configure a Contact from a Group 811

Create an Everyday User from a Contact 816

System Administration > Settings 825

Edit System Parameters 826

Import Registration Information 830

Configure the Confirmation Email Subject Line 834

Reservation Wizard Required Fields 836

Configure Required Fields in the Reservation Wizard 836

Configure Email Settings 838

Set the Global Email Preference to SMTP and My Personal Email Preference to Outlook 841

Set the Global Email Preference to SMTP 841

Set Your Personal Email Preference to Outlook 842

System Administration > Security 843

Plan Your Security Configuration 844

Overview of User Processes 846

Event Processes 846

Billing Processes 847

849

Configuration Processes 849

850

Inquiry Processes 850

Report Processes 851

Reservation Processes 852

Special Processes 854

Everyday User Processes (Administrator and Guest Request) 857

Hoteling Processes 859

Academic Event Processes 861

Administrative Processes 861

EMS Campus Planning Interface Processes 864

CPI Configuration Processes 864

CPI Course Processes 867

CPI Inquiry Processes 871

CPI Report Processes 872

Configure Users 873

Configure an EMS Desktop Client User 875

Set EMS Desktop Client User Event Security 882

Set EMS Desktop Client User Categories 884

Set EMS Desktop Client User Processes 886

Configure EMS Desktop Client User Building Rights 887

Specify EMS Desktop Client User Room Access 889

Set User Status Options 892

Set User Queries Option 893

Set User Academic Security (EMS Campus Only) 895

Set User Processes (EMS Campus Only) 898

Export a List of User Accounts 899

Configure User Templates 900

Configure a User Template 901

Specifying Categories 904

Configure Processes 905

Configure Buildings 907

Specify Room Access 908

Specify Statuses 911

Specify Queries 913

Configure Academic User Templates 915

Configure User Security for Multiple User Accounts 919

Configure User Security for Multiple User Accounts 920

Configure Mass User Security for a Category 921

Configure Mass User Security for a Process 923

Configure Mass User Security for a Room 925

Configure Mass User Security for a Status 928

System Administration > Tools 930

Change Group Wizard 931

To use the Change Group Wizard 931

Change Reservation Wizard 935

Room Administration Wizard 939

Using the Room Administration Wizard 939

Use the Room Administration Wizard to Add Rooms 941

Using the Room Administration Wizard to Delete Rooms 947

Manage Saved Reports 951

Edit a Saved Report 952

Delete a Saved Report 953

Override Existing Bookings Utility 954

Import Reservations Utility 960

Best Practices for Using the Reservation Import Utility 961

Additional Best Practices 962

Configure the Reservation Import 965

Import Reservations Into a Session 970

Delete a Reservation Import 974

View and Email Logged-In Users 976

Delete Old Data 980

Currency Configuration Wizard 983

Booking Move/Change Status Wizard 989

Use the Booking Move/Change Status Wizard 990

Move Multiple Bookings to a Different Date 992

Change the status for multiple bookings 995

The Video Display Interface 999

Migrate Data 1004

System Parameters 1006

EMS Desktop Client System Parameters 1007

EMS Web App Parameters 1332

EMS for Outlook System Parameters 1485

EMS Kiosk Parameters 1507

EMS Mobile App Parameters 1544

Import File Specifications 1569

How Do I Import Data? 1570

Special Date Import File Specification 1572

Room Import File Specification 1574

Resource Import File Specification 1575

Group Import File Specifications 1579

Reservation Import File Specifications 1583

Course Schedule Import File Specifications 1587

Video Conferencing 1589

Configure Video Conference Capabilities 1592

Configuring Video Conference Room Features 1593

Configure Video Conference Services (Categories and Resources) 1596

Configure a Video Conference Booking Template 1597

Configure Notifications and Reports 1603

Overview of Video Conferencing Configuration 1604

Academic Import Utility 1607

Fixed Width Format 1613

Configured Items for the AIU 1618

Configure an AIU session 1622

Import the Data into the Session 1628

EMS Desktop Client Deployment Options 1634

Decision Guide: Web Vs Conventional Deployment 1635

What are My Deployment Options? 1635

EMS Desktop Web Deployment 1635

Conventional Deployment 1636

Features of Each Deployment Method 1637

Web Deployment 1641

How Web Deployment Works 1642

Networking Components 1642

Optional Connections 1643

Architecture Diagram 1644

Conventional Deployment 1645

What is Conventional Deployment? 1645

Network Diagram 1646

Easy Deployment with a Conventional EMS Desktop Client Deployment 1647

What is EMS "Easy Deployment"? 1647

What Are My Deployment Options? 1648

How a Deployment Changes Standard Configurations 1648

Prerequisites for Easy Deployment 1650

Modify the EMS Web Deploy Service 1651

Modify the Desktop Client 1651

Updates 1652

Enable SSL on Web Deployment 1653

Section 1 1653

Section 2 1655

Troubleshooting 1659

Run NGen 1659

Starting EMS

After EMS has been installed on your desktop, a shortcut icon for the application is placed on your desktop. An option for the application is also available from your Start menu. You can double-click the desktop icon to launch the EMS application, or you can select the option from your Start menu.

1. Access the EMS application in either of the following ways:

» On your desktop, double-click the EMS icon.
» Open the Windows Start menu, in the Search field, enter EMS and then select the EMS option.

If you are the first person to log in to the EMS application at your organization, a dialog box opens where you enter the information for the login server and database that your application is accessing. (These are set up during implementation.) After you enter this information, the EMS Login dialog box opens.

EMS Login Dialog Box

2. As the EMS Administrator, enter “admin” in both the User ID and Password fields, and then click OK. If this is the first time that your EMS application has been accessed at your organization, a Registration dialog box opens. You must import the license file (License.lic) that was provided with your EMS software to register your application. See “Importing Registration

Information”; otherwise, go to Step 3.

3. Click OK. The EMS application opens. The main menu is open in the application.

Note: For security reasons, after you log in to EMS the first time using “admin” as both the username and password, at a minimum, we recommend that you change the account password. Ideally, you should

create an entirely new administrator account with a new username and password. See Also: Configure Users.

Overview of EMS Desktop Client Configuration

This guide leads you through all aspects of configuring EMS under the assumption that you have installed the application and have Administrator access. For training in initial setup and configuration, please contact EMS Professional Services. Titles of many sections in this Guide refer to menu options from the main menu in EMS Desktop Client.

To enable end-users to make reservations in EMS, at a minimum, you should configure buildings, rooms, statuses, and groups. We recommend that you configure your system in the following phases:

- Configuration > Facilities
- Resources
- Configure Groups
- Configure Users
- Configuration > Billing
- Configuration > Administration

- System Administration > Settings
  - Edit System Parameters

- System Administration > Security
- System Administration > Tools
- Import File Specifications
- Configuration > Other

Authentication Options for EMS Desktop Client

Authentication is controlled by three factors. They all must be configured correctly for the authentication to work:

1. **Login Credentials**: This is the location where external LDAP/Windows/Portal credentials need to be entered in our software for each user.
2. **Enabled by**: This is either a parameter or checkbox that needs to be enabled for the authentication to work.
3. **Configuration Page**:This is where configuration and options are set for the authentication.

INTEGRATED WINDOWS AUTHENTICATION

- Login Credentials: Network ID field in desktop user account settings (Make sure to include domain, example: "ems\username").
- Enabled by: Always enabled unless LDAP is turned on.
- Configuration Page: None.

LDAP

- Login Credentials: Network ID field in desktop user account settings (external reference doesn't work).
- Enabled by: "Use Integrated Authentication Only" EMS parameter set to **Yes**.
- Configuration Page: The EMS Desktop Client pulls from the EMS Web App LDAP setup (apconfiguration.aspx page); there are multiple tabs.
- Other Notes: an EMS LDAP License is required for this to work. Client machines must have access to the directory server for this to work.

» The EMS Main Window

The EMS main window is your starting point for the EMS application. The window provides quick access to all the EMS functions (Reservations, Reports, Configuration, and so on) and system tools. The EMS main window has three major components:

1. Menu Bar
2. Toolbar
3. Main Menu

EMS Main Window

MENU BAR

The menu bar is set up in a standard Windows menu format with menu commands grouped into menus (File, Settings, Reservations, and so on) across the menu bar. Some of these menu commands are also available in the main menu.

Tip: To see which database your application is pointing towards, click File > **Change Database**.

TOOLBAR

The toolbar provides quick access to the most commonly used EMS functions. The toolbar buttons that are always displayed by default are the buttons for Book, Calendar, Wizard, Navigator, Browser, Everyday User Reservations, Clients, Email, Dashboard, and Manage Services. Other buttons for other functions are also displayed by default depending on the version of EMS that you are running, for example, EMS Campus or EMS Workplace. Some of the functions that are available on the toolbar are also available from the main menu. You can customize the appearance of this toolbar to best suit your business needs. The example below shows some customized buttons.

> Tip: Additional buttons may be viewed by clicking the dropdown arrow in the lower right corner of the toolbar.

CUSTOMIZING THE TOOLBAR

1. Right-click the toolbar and click Customize. The Customize Toolbar dialog box opens.

2. You can adjust your toolbar appearance as follows:

- To display the toolbar icons as large icons, select **Large Icons**; otherwise, click **Small Icons**.
- To hide an icon from the toolbar display, in the Show Buttons panel, select an icon (CTRL-click to select multiple icons), and then Hide (<). Conversely, to show an icon on the toolbar display, in the Hide Buttons panel, select an icon, and then Show (>).
- To change the order (from left to right) in which the icons display on the toolbar, select the icon, and then **Move Up** or **Move Down** as needed.

> Tip: You can also move a toolbar icon between the Hide and Show panels by double-clicking the icon. To move all icons from one panel to another in a single step, you do not have to select any icons. Instead, click the appropriate Hide All button (<<) or Show All button (>>)

4. Click **OK**. The Customize Toolbar dialog box closes and your toolbar is updated to reflect your changes.

MAIN MENU

Every time you open EMS, the main menu opens in the EMS main window. You can access the primary EMS system functions—Reservations, Reports, Billing, Configuration, and System Administration—from the main menu.

The main menu is arranged in a Windows Explorer-style folder structure. The top-level folders are the system functions of Reservations, Reports, Billing, Billing, Configuration, and System Administration.

The available tasks for each top-level folder are further organized into subfolders. For example, to carry out a system administration task, you must first open the top-level System Administration folder, and then open the correct subfolder to view the list of available tasks.

You can always close the main menu by clicking Close (x) in the upper right corner of the menu. To open the main menu again, on the EMS menu bar, click File > **Show Main Menu**.

The EMS Browser Window

Many EMS functional areas use a *Browser* window. For example, the Groups window, the Query Builder window, and the Service Order Management window are all EMS Browser windows. You use an EMS Browser window to search for data, add new data, and edit and/or delete existing data. For example, in the Groups Browser window, you can search for groups or contacts, add new groups or contacts, and edit or delete existing groups or contacts. Regardless of the EMS functional area, all EMS Browser windows have the following features in common:

- The **click and drag** feature enables you use to group data by a specific column, rearrange the order of the data columns, or change the width of a column. This feature is always indicated by the option to drag and group by a column header at the top of an EMS Browser window. If a window/window pane does not display this option, then the window/window pane is not an EMS Browser window.
- A **column context menu** that has a multitude of options for sorting data, grouping data, sizing columns and so on.

- A **filtering** feature that you can use to find and work with a subset of data in the window.
- A **column sorting** feature that you can use to sort data by a specific column.

This topic provides information on the following:

- Grouping Data by Columns
- Rearranging Columns
- Changing Column Width
- Using the Context Menu
- Filtering Data
- Changing the Sort Order of Data

> Note: These procedures are explained using the Groups window; however, the instructions are applicable for any Browser window in EMS.

GROUPING DATA BY COLUMNS

In any browser window, you can drag a column header to the indicated location and group the data by the selected column. You can drag multiple column headers to the location. If you sort data by multiple columns, then the first column is the parent column. All other columns are placed as child columns, and the data is grouped accordingly in the browser window.

REARRANGING COLUMNS

You can rearrange column order by dragging a column to a new location using the column heading.

CHANGING COLUMN WIDTH

You can change column width by resting the mouse pointer on the right side of a column heading until the pointer changes to a double-

headed arrow, and then dragging the boundary.

USING THE CONTEXT MENU

Right-click in any column in a browser window to open a context menu that has a multitude of options for sorting data, grouping data, sizing columns, and so on.

FILTERING DATA

1. Open a browser window, for example, the Groups window.
2. Place your cursor in the data column by which you want to filter the data. For example, to filter data based on the City for group records, place your cursor in the City column. A Filter icon is displayed in the column.
3. Click **Filter** to open a list of filter options, and then select the appropriate option for creating the filter.

> Tip: Any filter you create is always displayed in the bottom left corner of the browser window

OPTION	DESCRIPTION
Custom	Opens the Custom AutoFilter dialog box in which you can construct a custom data filter.

OPTION	DESCRIPTION
Blanks	Filters data based on NULL (blank) data for a field. For example, if you click on Blanks in the City column in the Groups window, then all group records for which the City field has a NULL (blank) value are displayed in the Groups window.
Non blanks	Filters data based on Not Null (not blank) data for a field. For example, if you click Non blanks in the City column in the Groups window, then all group records for which the City field does *not* have a NULL (blank) value are displayed in the Groups window.

OPTION	DESCRIPTION
<Specific Data Value>	A Filter list also displays each unique value that has been entered for the field. Select a value on this list to filter the data by the value. For example, select “Denver” in the City column of the Groups window to display only those group records that have “Denver” specified as the group’s city.

4. To edit the current filter, you can click **Edit Filter** in the lower right corner to open the Filter Editor dialog box.

» To add a new condition to a filter, click **Add/Insert**.

» To remove a condition from a filter, click **Delete** at the end of the filter.

» To apply a new filter, click **Apply**.

» To close the Edit Filter dialog box and return to the browser window, click **OK**.

CHANGING THE SORT ORDER OF DATA

When a browser window first opens, data are sorted in ascending order based on the data in the *first* column of the window. For example, when the Groups window first opens, the group records are displayed on the Results tab alphabetically by Group name. To change the sort order of the data in a browser window:

1. Click once in any column header to display a Sort Order icon; an “up” arrow indicates that data is sorted in ascending order.
2. Click the up arrow to sort data in descending order.
3. Click the down arrow to sort data in ascending order.

Configuration > Facilities

Before you can use EMS to manage your organization's events, you must configure core facilities that are specific to your organization. For example, before you can reserve a room, you must first configure the room. This menu is available on the EMS Desktop Client top menu bar under Configuration>**Facilities**.

It is recommended that for first-time configurations, you configure items on this menu from bottom to top.

Note: Floor Plan Diagrams and Floor Plan Indicators are optional features used when your organization has the optional add-on, EMS Floorplan.

This section will include information on the following:

- Configuring Rooms
- Configuring Buildings
- Configuring Building Hours
- Configuring Areas
- Configuring Room Types
- Configuring Setup Types
- Building Hours Wizard
- Configuring Features
- Configuring Floors
- Configuring Floor Plans
- Configure Public Views

Note: If your organization has purchased and installed EMS Campus, then you can synchronize data from your Student Information System (SIS) such as your campus buildings, rooms., and room types. As a result, before you carry out any configuration of your facilities data, see the EMS Campus Configuration Guide.

Overview of Configuring Rooms

A ***room*** is a physical location that you reserve for an event. You can configure any physical location or space (meeting room, athletic field, lobby, and so on) as a room, for example:

- Grand Ballroom
- Conference Room A
- Harris Hall Room 200
- South Soccer Field

EMS uses three classifications of rooms:

1. Standard and Combination Rooms
2. Standard and Combination Rooms
3. Override Rooms

Your organization might use a different term to identify the spaces or locations that are booked for reservations at your facilities. If you want to change the term from “room” to your organization-specific term throughout your EMS system (menus, window and dialog box titles, confirmation headings, and so on), you must change the values for the Room Title Plural and Room Title Singular parameters. **See Also:** System Parameters.

STANDARD AND COMBINATION ROOMS

A ***standard*** room is any physical space that can be booked at your facility. You can use standard rooms as components when you configure a ***combination*** room. You can configure a combination room from two or more standard rooms, or you can configure it based on a logical relationship among multiple rooms. For example, if your organization is a student union, it might have a space that is designated as the Grand Ballroom, which is actually made of three standard rooms—Ballroom A, Ballroom B, and Ballroom C—and you can literally combine or divide these rooms using movable partitions. In another example, you could configure

a combination room that is called the West End and this room includes all rooms in the West End of a given building, whether the rooms are contiguous.

To configure a combination room, you must first configure the component rooms as standard rooms. You can then configure the combination room and indicate that its components are the previously defined standard rooms. Consider the ballroom example cited above: First, define the standard rooms—Ballroom A, Ballroom B, and Ballroom C. You then configure a room called the Grand Ballroom, give it a classification of “combo room” and indicate that it is made up of three standard rooms—Ballroom A, Ballroom B, and Ballroom C. If you want, you can also configure subsets of the Grand Ballroom, such as Ballroom AB, Ballroom AC, and Ballroom BC. As a result, when the Grand Ballroom is scheduled for an event, the three standard rooms—Ballroom A, Ballroom B, and Ballroom C—are unavailable in EMS. Conversely, if you schedule one of the three standard rooms, for example, Ballroom A, then the Grand Ballroom, Ballroom AB, and Ballroom AC, are unavailable in EMS. The table below summarizes this example.

ROOM	CLASSIFICATION	COMPONENTS	COMMENTS
Ballroom A	Standard	N/A	Available for booking only if Ballroom AB, Ballroom AC, or the Grand Ballroom are not already booked.
Ballroom B	Standard	N/A	Available for booking only if Ballroom AB, Ballroom BC, or the Grand Ballroom are not already booked.
Ballroom C	Standard	N/A	Available for booking only if Ballroom BC, Ballroom AC, or

ROOM	CLASSIFICATION	COMPONENTS	COMMENTS
			the Grand Ballroom are not already booked.
Ballroom AB	Combo	Ballroom A, Ballroom B	Available for booking only if Ballroom A, Ballroom B, or the Grand Ballroom are not already booked.
Ballroom AC	Combo	Ballroom A, Ballroom C	Available for booking only if Ballroom A, Ballroom C, or the Grand Ballroom are not already booked.

ROOM	CLASSIFICATION	COMPONENTS	COMMENTS
Ballroom BC	Combo	Ballroom B, Ballroom C	Available for booking only if Ballroom B, Ballroom C, or the Grand Ballroom are not already booked.
Grand Ballroom	Combo	Ballroom A, Ballroom B, Ballroom C	Available for booking only if none of the standard rooms or none of the subset ballrooms are not already booked.

OVERRIDE ROOMS

An override room is used to book an event in a space that is not managed in EMS. When you configure an override room, you not only name it in a manner that indicates that the room is an override room (for example, “Override Area”), but also, you classify the room as “Override Description.” When a user is searching for a specific room in the Reservation Wizard, and selects the option of “Override Area,” a Location field is enabled in which they must enter the specific location of this override room. By using an override room, the user can schedule a meeting (for example, Dr. Wilson’s Research Group meeting) without having “Dr. Wilson’s Office” configured as a room in EMS.

Events that are scheduled in rooms that are classified as “Override Description” are displayed in Daily reports as taking place in the location name specified, in the building in which the room is configured. Sales and Statistical reports simply report on the use of a room as you defined it, for example as “Override Area."

Configuring Rooms

By defining rooms in your organization, you enable Everyday Users to choose from a list of rooms that they can intuitively filter by many elements, such as name, location, type, setup, available services, and physical features.

Tip: The Room Configuration Wizard is ideal for configuring multiple rooms at once, when they should have the same configuration: room type, setup hours, teardown hours, features, and setup type). For instructions in using the wizard, first familiarize yourself with the general process of defining rooms in this topic, and then **See Also:** Room Configuration Wizard.

To configure a room, you will

- Check if the room has already been configured.
- Edit an existing room to add more detail, or configure a new one from scratch.

- Define the room in detail by going through the tabs along the top of the Room configuration page
- *Optional:* You can specify the pricing for the room during this process, or you can price it a later date.

This topic includes information on the following:

- Basic Elements for Configuring a Room
- Notes or Alerts for a Room
- Configure Calculations for a Room
- Configure Pricing for a Room
- Set Setup Types for a Room
- Set Components for a Combination Room
- Set Features for a Room
- Exclude Resources for a Room
- Add Attachments to a Room
- Add an Image for a Room
- Add Drawings for a Room
- Set Values for User Defined Fields (UDFs) for a Room
- Assign the Room to an Everyday User Process Templates

This topic guides you in configuring a single room; once you have configured everything else under the **Configuration> Facilities** menu, room configuration is where "everything comes together," since defining a room entails all these elements.

BASIC ELEMENTS FOR CONFIGURING A ROOM

At a minimum, you must specify the room code, the room name, the room classification, and the Building that contains the room. All other information is optional, and you can configure it at a later date if needed.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > **Rooms**. The Rooms configuration page opens.

2. In the fields along the top, enter any of the following criteria to narrow the list of rooms below or to set basic information for a new room configuration:

- **Building**
- **Classification**: Leave the default value of (all), or select a specific room classification.
- **Room Type**: Leave the default value of (all), or select a specific room type.
- Filter: Keyword search (case sensitive, characters must be in correct order).

3. *To modify an existing room*, double-click on it or select and click **Edit**.

   To create a new room "from scratch," click the **New** button. The Room configuration page opens on the Room tab, where you work with basic information.

> Tip: You can also click **Copy** to use an existing room to configure a new one more quickly

Room

Room | Notes | Calculations | Pricing | Setup Types | Features | Excluded Resources | Attachments | Images | Drawings | User Defined Fields | Everyday User Process Templates | Audit

Room Code:
Room Name:
Classification: Standard
Setup Hours: 0.00 Teardown Hours: 0.00
Book Sequence: 0
Type: (none)
Building: Denver Main Office
Floor: (none)
Account: (none)
Phone:
HVAC Zone:
URL:
Size: 0 Cost Per Hour: $0.00
No. Room Cards: 1
Academic:
External Reference:

Check In
Requires Check In: Allow Check In 0 Minutes Prior To Booking Event Start

Everyday User Application Settings
Available to Everyday Users:
Hide Groups:
Display Alert to Everyday Users:
Prompt for Billing Reference:

Inactive Spelling OK Cancel

4. Enter the information for the new room.

FIELD	Description
Room Code	Required field. Abbreviated text that conveys the room name or description. For example, if a room is named Conference Room 100, then a code for the room could be CONF100. **Note**: The room code can be a maximum of 20 characters, including spaces.
Room Name	Required field. The name of the room. **Note**: The room name can be a maximum of 50 characters, including spaces.
Classification	Select the appropriate classification for the room.
Default Setup Type	Leave the default as (none), or select a setup type from the list.

FIELD	Description
	Note: A user can override this value when reserving the room, or when editing the event. If the appropriate setup type is not listed, you can configure it.
Setup Hours Teardown Hours	These settings establish the default setup and teardown hours for the room, which are automatically added to the beginning and end of the event time the user specifies in the Reservation Wizard or in EMS Web App. A user can override these values in the Reservation Wizard.
Book Sequence	This value determines the order in which the rooms are listed in the Reservation Wizard for a standard or best fit room search and in the Reservation Book. Enter a zero for the first room that is to be listed. Rooms are ordered from lowest to highest sequence number, with the room with the lowest sequence number being displayed first.

FIELD	Description
	Note: If you leave the book sequence set to zero for all rooms, then rooms are sorted numerically by room code, and then alphabetically.
Type	Room type. Leave the default as (none), or select a room type from the list. **Note**: If the appropriate room type is not listed, you can configure it.
Building	Required field. If you selected a single Building when setting criteria, this field carries over that value. You can change it.
Account	Enter the internal account that should be credited with the room rental revenue.

FIELD	Description
	Note: If the appropriate account is not listed, you can configure it.
Phone	The phone number for the room.
HVAC Zone	Optional field used for integration with an HVAC system (e.g., See Also: Cisco TMS Interface).
URL	The URL (website address) for a web page that provides more information about the room.
Size	Typically used to enter the square footage of the room.
No. of Room Cards	Indicates how many copies of the Room Cards report should be printed for this room when the report is run. (Typically, you want one copy for each entry door). If you do not want a room card to print, enter a zero.

FIELD	Description
	Note: This controls whether you can Configure and Generate Room QR Codes for this room.
Requires Check In	Requires bookings within this room to be checked-in to beginning at a certain number of minutes prior to the Booking Start Time. **See Also:** Enable Booking Check In.
Academic	Available only in EMS Campus. Set an academic" property on the room.
External Reference	Links the room to an outside program, if needed.
EMS WEB APP SETTINGS	
Available to Everyday Users	Leave this option selected if events that are scheduled in the room are to be displayed in EMS Web App.

FIELD	Description
Hide Group	Select this option to hide the name of the Group that booked an event in the room in the Browse Event tooltip.
Display Alert to Everyday Users	Select this option to display any alerts that have been configured for the room when a EMS Web App user schedules an event in the room.
Prompt for Billing Reference	Users will see the Billing Reference field during the booking process when this parameter is set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the Admin decides whether to display the field, user entries

FIELD	Description
	will be validate based on the value in the 'Billing Reference Validation' parameter set on the template. Billing Reference field options: » Show (Prompt) » Require » Validate (Show and Require) » Don't Show Additionally, the **Billing Reference Validation** parameter will always determine whether it is optional, required, or required and validated. **See Also:** Configuring Field Behavior for Billing Reference and PO Numbers.
Inactive	Leave this option blank to add the room as an active room. Select this option to inactivate the room.

5. If the room is a Combo room, then see Configure Room Types; otherwise, continue to the subsequent procedures in this topic.
6. Click **OK**. The Room configuration page closes and the newly configured room is listed.

NOTES OR ALERTS FOR A ROOM

1. From the Room configuration page, open the **Notes** tab.
2. Enter one or more of the following for the room:

OPTION	Description
Notes	Free form text that provides any additional information or description about the room. **Note**: These notes are *not* included in confirmations that are printed for events that are scheduled in the room.
Confirmation Notes	These notes are included in any confirmations that are printed for events that are scheduled in the room.

OPTION	Description
Alert	Free form text that provides any additional information or description about the room. This text is displayed when an EMS user schedules an event in the room, and if Display Alert to Everyday Users is selected for the room, when a EMS Web App user schedules an event in the room as well.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page. The newly configured room is displayed in the list of rooms.

CONFIGURE CALCULATIONS FOR A ROOM

1. From the Room configuration page, open the **Calculations** tab to link predefined calculations to the room so they are always included in billings for it. (**See Also:** Configure Calculations).
2. Select the calculation(s) you wish to link to the room in the Available list and use the arrow keys to move to the Selected list.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page. The newly configured room is displayed in the list of rooms

CONFIGURE PRICING FOR A ROOM

Tip: You can also configure the room price on the Edit Pricing window. **See Also:** Configure Room Pricing and Configure Rate Schedules.

1. From the Room configuration page, open the **Pricing** tab to link the room to pre-defined pricing methods so these are used for billing.
2. For each rate schedule, select the Pricing method, which determines the cost for reserving the room. If the appropriate rate schedule is not listed, you can configure it.

PRICING METHOD	Description
Half Day/Full	The total number of hours for the event is counted and then

PRICING METHOD	Description
Day (Event Time)	compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.
Half Day/Full Day (Reserved Time)	The total number of hours for the Reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the Reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the Reservation is greater than the hours that are indicated in the Hours column, then the Full

PRICING METHOD	Description
	Day price is charged for the room.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial flat" fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial flat" fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding a room to a booking.

PRICING METHOD	Description
Unit	The price that is indicated in the Price column is applied to the room, regardless of the event time or reserved time for the booking.

3. After you select a pricing method, edit the amounts in the fields below as needed.

FIELD	Description
Price	The dollar amount that is used in calculating the room price for a booking. If the pricing method is Unit, then this value is applied in total to a room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room, then the actual price, the discount percentage, and the discounted amount are all displayed on

FIELD	Description
	confirmations and invoices.
Min. Charge Max. Charge	Used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A room price that remains constant regardless of the total number of hours booked for a room. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

FIELD	Description
Full Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

SET SETUP TYPES FOR A ROOM

1. From the Room Configuration page, open the **Setup Types** tab and linl predefined setup types to the room.
2. For each setup type you wish to apply for the room, select **In Use**, and use the Min Capacity and/or Max. Capacity fields to set headcount limits. If the appropriate setup type is not listed, you can configure it.

> **Tip:** If EMS Web App users are able to request a setup type for the room, the **Allow Everyday User Request** option will be set to Yes. This is controlled by your Configure Setup Types.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page.

SET COMPONENTS FOR A COMBINATION ROOM

Note: This tab is available only if you selected Combo for the room classification.

1. From the Room configuration page, open the **Components** tab.
2. Do one or both of the following:

» On the Building dropdown list, select one of the following–(all) Buildings, a specific Building, a specific area, or a specific view. If the appropriate Building, area, or view is not listed, you can configure it.

» On the Room Type dropdown list, leave the default value of (all), or select a specific room type. If the appropriate room type is not listed, you can configure it. As you select your search criteria, the list of rooms dynamically updates.

3. On the Available list, CTRL-click to select multiple rooms that will comprise the Combo room, and then Move (>) to them to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

SET FEATURES FOR A ROOM

1. From the Room configuration page, open the Features tab.
2. On the Available list, select the feature (CTRL-click to select multiple features) and Move (>) to the Selected list. If the appropriate feature is not listed, you can configure it. See Configuring Features.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

EXCLUDE RESOURCES FOR A ROOM

This setting prevents EMS Web App users from selecting a resource from a room. EMS Desktop Client users just receive a warning, but they can still select the resources for the room.

1. From the Room configuration page, open the **Excluded Resources** tab.
2. On the Category dropdown list, select the category that contains the resources that are to be excluded from the room. The resources for the selected category are displayed in the Available list. If the appropriate category and/or resource is not available, then you can configure it. See Configure Categories and Configuring Resources for a Category.
3. Select the resource (use CTRL-click to select multiple resources) to exclude from the room, and Move (>) to the Selected list.
4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

ADD ATTACHMENTS TO A ROOM

An attachment is a file that is saved with the room record. For example, you might want to add an attachment to a room record that details any special considerations about the room setup. Users can see the attachments when they are viewing details about the room.

1. From the Room configuration page, open the **Attachments** tab.
2. Click **New** to open the Find Attachment dialog box, and then browse to find and select the attachment. The Find Attachment dialog box closes. Your attachment displays on the tab.
3. Optionally, do one or more of the following:

» In the Notes field, enter a description and/or additional information about the attachment.

» Click Spelling to spell check the attachment notes before you save the room.

» You can view an attachment: select the attachment, and then click **View**. Your EMS Desktop Client must have a software program installed to view the attachment. For example, to view a Microsoft Excel spreadsheet, you must have Microsoft Excel installed on your EMS Desktop Client.

4. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

ADD AN IMAGE FOR A ROOM

Tip: Images are displayed as thumbnails in both EMS and EMS Web App when a user views details about a room. You can associate an image with a room if the image is in one of the following formats–.gif, .jpeg, .jpg, .bmp, .wmf, .pdf or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling.

1. From the Room configuration page, open the **Images** tab.
2. Click **New** to open the Find Image dialog box, and browse for your image file. Once you have chosen on an image, it will be listed on the Images tab.

> **Tip:** You can use the **Web App Long Description** field to enter a description of the image that will display on the EMS Web App.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page..

ADD DRAWINGS FOR A ROOM

A ***drawing*** is text-based or image file that is stored on your organization's network that you can reference in a booking. Typically, a drawing is a setup diagram of the booking room. If the drawing is an image file, and you want your users to be able to view the image in EMS and EMS Web App when making a Reservation, then you should associate the image with the room on the Images tab.

1. From the Room Configuration page, open the **Drawings** tab.
2. Click **Attach** to open the Find Drawing dialog box, and then browse for your drawing file. Once you have chosen the file, the drawing is displayed on the Drawing tab.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

SET VALUES FOR USER DEFINED FIELDS (UDFS) FOR A ROOM

1. From the Room configuration page, open the User Defined Fields tab to add pre-defined fields to the room that will be used during the booking process.
2. For each UDF defined for the room, select the UDF, and then click **Set Value**.
3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page.

ASSIGN THE ROOM TO AN EVERYDAY USER PROCESS TEMPLATES

By assigning a room to an Everyday User process template, you enable these users to select it from Everyday Applications such as EMS Web App and EMS Mobile App when they book events using the template. To learn more, **See Also:** Configure Everyday Users

1. From the Room configuration page, open the **Everyday User Process Template** tab.
2. On the Available list, select the everyday user template (CTRL-click to select multiple templates) for which the attached users can book the room, and then Move (>) them to the correct Selected list.

» Move templates for which users can reserve the room without approval (booked into the Reserve status in EMS Web App) into the Reserve pane.

» Move templates for which users must get approval to reserve the room (booked into the Request status in EMS Web App) into the Request pane.

3. Continue with any other optional configuration for the room as needed; otherwise, click **OK** to close the Room configuration page and return to the Rooms window. The newly configured room is displayed in the window.

Room Configuration Wizard

The Room Configuration Wizard enables you to configure multiple rooms at one time. These rooms should have the following properties in common:

- Room type
- Setup hours
- Teardown hours
- Features
- Setup types

This topic provides information on the following:

- Using the Room Configuration Wizard
- Configure Features for Multiple Rooms
- Exclude Resources for Multiple Rooms
- Configure Common Setup Types for Multiple Rooms
- Configure Common UDFs for Multiple Rooms

USING THE ROOM CONFIGURATION WIZARD

1. On the EMS menu bar, click Configuration > Facilities > Rooms. The Rooms window opens.

2. Click Wizard. The Room Configuration Wizard opens, with Features tab (in the Items pane) active.

3. Select the common properties for all the rooms that you are configuring and enter the appropriate values.

OPTION	COMMENT
Room Type	If the appropriate room type is not listed, you can configure it.
Floor	If the appropriate floor is not listed, you can configure it.
Account	If the appropriate account is not listed, you can configure it.
Default Setup Type	If the appropriate setup type is not listed, you can configure it. Note: A user can override this value when reserving the room, or when editing the event.
Setup Hours	These settings establish the default setup and teardown hours for the room, which are automatically added to the beginning and end of the event time that user specifies in

OPTION	COMMENT
Teardown Hours	the Reservation Wizard or in EMS Web App. A user can override these default values in the Reservation Wizard.
Available to Every-day Users	Select if events that are scheduled in the room are to be displayed in EMS Web App.
Active	Select either Yes or No to activate or inactivate a room.
Prompt for Billing Reference	Select to prompt for a billing reference when a room is selected for a booking.
Requires Check In	Requires bookings within this room to be checked-in to beginning at a certain number of minutes prior to the Booking Start Time.

Tip: If you are configuring a room in EMS Academic Planning, then Academic Space is also a common property that you can configure.

4. If you want the events scheduled in the room to display in EMS Web App, select Available to Everyday Users.
5. If these rooms are to be active (available immediately for booking events), select Active. (Yes is selected by default). Otherwise, select No.
6. Click Next. The Room Configuration Wizard presents so you can search for the rooms you want to configure.

7. Enter any combination of search criteria, by Building and Room Type.
8. On the Available list, select the room (CTRL-click to select multiple rooms) to be configured, and then Move (>) to the Selected list.
9. Click Finish. The Room Configuration Wizard closes. A message opens indicating that the room properties were set successfully.
10. Click OK. The message closes. You return to the Rooms window. The newly configured rooms are displayed in the window.

CONFIGURE FEATURES FOR MULTIPLE ROOMS

1. If all the rooms should have the same features, under Items, select Features.
2. On the Available list, select the feature (CTRL-click to select multiple features) you want the rooms to have. If the appropriate features are not available, you can configure them. See Configuring Features.
3. If any of the rooms that you select for configuration have existing features and you want to drop these existing features and apply only the new features, select Overwrite Existing; otherwise, the new features are simply appended to the list of existing features.

4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard.

EXCLUDE RESOURCES FOR MULTIPLE ROOMS

1. Under Items, select Excluded Resources. The Excluded Resources tab opens.
2. Select the category that contains the resources that are to be excluded. The category's resources are displayed in the Available list.
3. On the Available list, CTRL-click to select multiple resources you want excluded from the rooms.
4. If any of the rooms you select for configuration have existing resources and you want to drop these existing resources and apply only the new resources, select Overwrite Existing; otherwise, the new resources are simply appended to the list of existing resources.
5. Click the Move button (>) to move the selected resources to the Selected list.
6. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard.

CONFIGURE COMMON SETUP TYPES FOR MULTIPLE ROOMS

1. Under Items, select Setup Types. The Setup Types tab opens.
2. If any of the rooms you select for configuration have existing setup types and you want to drop them and apply only the new setup types, select Overwrite Existing; otherwise, the new setup types are simply appended to the list of existing setup types.
3. For each applicable setup type, select In Use, and then use the Min. Capacity and/or Max. Capacity fields to set headcount limits for the setup type.
4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard.

CONFIGURE COMMON UDFS FOR MULTIPLE ROOMS

1. Click User Defined Fields. The User Defined Fields tab opens. All the UDFs that have a type of Room are displayed on the tab.

2. If any of the rooms you select for configuration have existing UDFs with set values and you want to drop them and apply only the new values, select Overwrite Existing; otherwise, the new values are simply appended to the list of existing values.
3. For each UDF you configure for the room, do the following:
    a. Select the UDF.
    b. Click Set Value to open a Value dialog box.
    c. Enter the value for the UDF in the Value field, and then click OK to close the dialog box and return to the User Defined Fields tab.
4. Continue with any other optional configuration for the room as needed; otherwise, click Next to continue in the Room Configuration wizard.

Configure Room Pricing

You can configure the pricing for a room on the Pricing tab of the Room dialog box, or you can configure the room, and then configure the pricing for it at a later date on the Edit Pricing window.

> Tip: You can also configure the room price at the time that you are configuring the room on the Room dialog box, or when you are configuring rate schedules.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > Rooms. The Rooms window opens.

2. On the Building dropdown list, select the building, area, or view that contains the rooms that you are pricing.
3. Click Pricing. The Edit Pricing window opens.

4. On the Rate Schedule dropdown list, select the rate schedule for which you are pricing the rooms.
5. You can leave the Room Type set to the default value of (all), and then click Display to display a list of all active rooms for all room types that have been configured in your EMS database. On the Room Type dropdown list, you can select a specific room type, and then click Display for a list of all active rooms of the selected room type.
6. For each room, select the pricing method, which determines the cost for reserving the room, using the field definitions below.

Pricing Method Fields

PRICING METHOD	DESCRIPTION
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged

PRICING METHOD	DESCRIPTION
	for the room. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the room. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the room.
Hourly (Event	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This

PRICING METHOD	DESCRIPTION
Time)	price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service (resource). This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the room to a booking.

PRICING METHOD	DESCRIPTION
Unit	The price that is indicated in the Price column is applied to the room, regardless of the event time or reserved time for the booking.

7. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and then edit the amount as needed.

FIELD	DESCRIPTION
Price	The dollar amount that is used in calculating the room price for a booking. If the pricing method is Unit, then this value is applied in total to a room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room, then the actual price, the dis-

FIELD	DESCRIPTION
	count percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the room. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).

FIELD	DESCRIPTION
Half Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the room price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

8. Repeat Step 4 through Step 7 for each rate schedule and/or grouping as needed.
9. Click Close. The Edit Pricing window closes. The pricing information is saved for the room.

Configure Override Rooms

An override room is used in EMS to loosely define useable space which is not formally configured. For example, a building may have private offices which are not configured as spaces available for public use, but you may need to select such a space for an attendee who is participating remotely in a video conference. In order to provide company employees the ability to schedule meetings in these private rooms, Override Rooms can be configured in EMS.

1. Name the space in a way that indicates an Override Room (for example, "Override Area 1”).
2. Classify the room as "Override Description.”

In the example above, "Override Area 1” can be used repeatedly to serve as a placeholder for any meeting request which will occur in an un-configured space.

For example on Monday a user makes a reservation for "Override Area 1" and names it "Meeting in Mike Thompson's Office", and on Wednesday another user makes a reservation for "Override Area 1" and names it "Meet Guests in Lobby Reception Area Prior to Building Tour."

EMS does not track availability for events booked in Override Rooms; however, EMS reports on events that are scheduled in an override room as it would for an event scheduled for any other room.

Configure and Generate Room QR Codes

In order to associate rooms with QR Codes (in EMS Desktop Client), you will:

- Enable Room Cards for Rooms
- Run the Room Card - QR Code Report to Generate QR Codes

This automatically generates the codes and associates them with the designated rooms.

ENABLE ROOM CARDS FOR ROOMS

1. Open the room configuration by navigating to Configuration > Facilities > Rooms.
2. Select a room for which you wish to create a QR code. (For complete instructions in configuring rooms, See Also: Configuring Rooms.)

3. Enter a value in the No. Room Cards field (a number greater than one means you can generate a QR code for this room).

4. Click OK to save your changes.

RUN THE ROOM CARD - QR CODE REPORT TO GENERATE QR CODES

1. Select Reports > Hoteling > Room Card - QR Code.

2. In the report setup window that appears, use the Buildings, Room Types, and Rooms tabs to specify the parameters for the QR Code report. Use the arrow keys to move your preferences to the selected list. You must specify

preferences on all three tabs.

3. You can add a logo and control the order and titles on the report on the Options tab.

» Click Sort Room Cards By Book Sequence to order the QR Room Cards the way they display in the Reservation Book (instead of by Room Name). Book Sequence is set in Room Configuration.

» To print separate QR Room Cards for each component (titled by Room Name), click Print Combo Room Components.

Tip: We recommend that you use one method to generate multiple cards for the same room: either configure the Room to have more than one room card (see Step 1) or set Copies To Print (above) to print multiple copies.

4. When you have specified all settings for your QR codes, you can click Print Preview to see a preview of the report (ideal for emailing, exporting, printing, and so on), or Print to print the file.

Sample Print Preview

Room Card - QR Code
Email
Export
Print
60 %
1/4
ems
EVENT MANAGEMENT SYSTEMS
Reserve · Register · Promote
Conference Room 2

Warning: If you see the error message below, return to the initial step above. The No. Room Cards field on the Room configuration should be greater than zero.

Error Message

Import Rooms

You can import rooms from a tab-delimited file into a building, area, or view that you select. (See Also: Room Import File Specifications). After you import rooms, you must edit the configuration (setup type, features, images, and so on) for each room.

1. On the EMS menu bar, click Configuration > Facilities > Rooms. The Rooms window opens.

2. On the Building dropdown list, select a specific building, a specific area, or a specific view into which to import the rooms.

> Tip: If the appropriate building, area, or view is not available, you can configure it. See Also: Configuring Buildings, Configure Areas, or Configure Public Views.

3. Click Import. A dialog box opens, indicating the number of rooms that you are about to import, and asking you if you want to continue.
4. Click Yes. A message opens indicating that the import was successful.
5. Click OK to close the message and return to the Rooms window.
6. For each room that was imported, select the room on the Rooms window, and then click Edit to open the Room in the Room dialog box.
7. Edit the room configuration as needed. See Also: Configuring Rooms.

Configuring Buildings

A ***building*** is a physical location that contains one or more spaces (rooms, open areas, and so on) that your users can reserve for an event. Buildings are one of the core data items that you must configure so that your users can make reservations in EMS.

This topic will provide the following information:

- Configure a Building
- Restrict a Building to Specific Categories
- Associate an Image With a Building
- Set Values for the User Defined Fields (UDFs)
- Specify Unregistered Attendee/Visitor Behavior

CONFIGURE A BUILDING

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > **Buildings**. The Buildings window opens. This window lists all the buildings that are currently configured in your EMS database.

2. Click **New**. The Building configuration dialog opens on the Building tab.

3. Enter the information as appropriate for the building using the subtopics in this topic.

> **Tip:** By default, when you configure a building, the building hours are set to Open All Day. To change these hours, see Configuring Building Hours. Only the building name, the building code, and the time zone are required fields. All other fields on all other tabs are optional and can be configured at a later date if needed.

FIELD	Description
Building	Required field. The name of the building (maximum 50 characters, including spaces).
Building Code	Required field. Abbreviated text that conveys the building name or description (maximum 20 characters, including spaces). For example, if a building is named the Conference Building, then a code for the building could be CONF.

FIELD	Description
Notes	Free-form text that provides any additional information or description about the building.
URL	The web address of a web page that provides more information about the building (for example, Google Maps).
Print Notes on Con-firmation	Include the building notes in any confirmations that are printed for events that are scheduled in the building.
Time Zone	Required field. Select the time zone in which the building resides. **Note**: If you are configuring buildings in EMS Enterprise, you can select a unique time zone for each building. If you are configuring buildings in EMS, all buildings must

FIELD	Description
	belong to the same time zone.
Currency	Select the currency to be used for pricing all rooms in the building. See Configure Currencies.
External Reference	Links the building to an outside program, if needed.
Cost Per Sq. Ft./Meter Per Yr.	Building cost. Used on the Room Utilization report.
Annual Operating Hours	Total number of hours that the building is open during a calendar year. Used on the Room Utilization report.

4. Continue with any other configuration for the building as needed in this topic; otherwise, click **OK** to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

RESTRICT A BUILDING TO SPECIFIC CATEGORIES

You can restrict specific categories to specific buildings only in EMS Enterprise. All categories are available to all buildings in EMS Professional.

1. From the Building Configuration page, click the Categories tab.

> **Tip:** The Available to All Buildings list in the lower right pane displays all the categories that are always available to all buildings and you cannot edit this list. You can also link buildings and categories when you are configuring categories. See Configure Categories.

2. Select the categories you want to be available for use in the building, and then use the arrow buttons to move the them to the Selected list.
3. Continue with any other configuration for the building as needed; otherwise, click **OK** to close the Building dialog box and return to the Buildings window. The newly configured building is displayed in the window.

ASSOCIATE AN IMAGE WITH A BUILDING

Images are displayed as thumbnails in both EMS Desktop Client and EMS Web App when a user views details about a building. You can associate an image with a building if the image is in one of the following formats: .gif, .jpeg, .jpg, .bmp, .wmf, or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling.

1. From the Building Configuration dialog, click the Images tab.

2. To have an image of the building display in EMS and the EMS Web App when a user is viewing building details, click **New** to open the Find Image dialog box, and then browse to and select the image. The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.
3. You can add enter a longer description of the building in the **Web Long Description** field. The value that you enter here defines the “long desc” attribute for web content accessibility.

4. Continue with any other configuration for the building as needed; otherwise, click **OK** to close the Building dialog box and return to the Buildings window.

SET VALUES FOR THE USER DEFINED FIELDS (UDFS)

1. From the Building configuration dialog, click the UDFs tab.

2. For each UDF that has been defined for the building, select the UDF, and then click the **Set Value** button to open a dialog box in which you can set

the value for the UDF.

3. Continue with any other configuration for the building as needed; otherwise, click **OK** to close the Building dialog box and return to the Buildings window.

SPECIFY UNREGISTERED ATTENDEE/VISITOR BEHAVIOR

The Visitor Management tab is displayed only if your organization has purchased and installed the optional Visitor Management module, which enables front-desk users such as reception to check in visitors, print badges, access lists of visitors, and run reports. The values that you specify on this tab are used when a new visitor checks into your building.

See Also: Enable Visitor Management.

1. From the Building configuration dialog, click the Visitor Management tab.

2. Enter the information for the new unregistered visitor/attendee.

OPTION	Description
Category	Select an Attendee type category. See Configure Categories.
Room	The Override room that is booked for the unregistered visitor's/attendee's reservation. **Note**: Typically, you would want to book an Override room

OPTION	Description
	named something such as Other Space, Unregistered Space, or so on. See Configuring Rooms.
Status	The status that is used for an unregistered visitor's/attendee's reservation. See Configure Statuses.
Event Type	The event type that is used for the unregistered visitor's/attendee's reservation. **Note**: Typically, you would want to use an event type named something such as Unregistered Visitor, Unregistered Attendee or so on. See Configure Event Types.
Event Name	The event name that is used for the unregistered visitor's/attendee's reservation. **Note**: You can include the variable for Group Name (the

OPTION	Description
	name of the group that the visitor/attendee is seeing) in the subject line as described in the Legend. For example, “Unregistered Visitor for%1%” would result in “Unregistered Visitor for Academic Affairs” being displayed in the subject line.
End Time	The booking for the unregistered visitor/attendee is created from the current time until the end time that you specify.

3. Continue with any other configuration for the building as needed; otherwise, click **OK** to close the Building configuration dialog and return to the list of Buildings.

Configuring Building Hours

By configuring building hours, you can set times when buildings and rooms therein are not available for scheduling.

In the EMS Desktop Client, configured building hours do not prevent a user from scheduling events outside these hours. A user is merely warned that the event is being scheduled outside normal operating hours. In EMS Web App, users cannot schedule events outside the configured building hours. Setup and teardown hours must also fall within the configured building hours for an event that is scheduled in EMS Web App.

By default, when you configure a building, the building hours are set to Open All Day, which means that the building is open 24 hours a day, 7 days a week, 365 days a year. If needed, you can configure the hours for a building so that a building is open only for a specified time period on a particular date or for a given date range. You can also configure the hours so that a building is closed all day. You can configure the hours for a build-

ing for a single date, or you can configure the hours for multiple dates in a single step.

> **Tip:** You can configure the same hours for multiple buildings using the Building Hours Wizard.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > **Building Hours**. The Building Hours window opens. This window lists buildings that are configured in your EMS database.

Building Hours Window

2. In the **Date** field, leave the default value of the current day's date, or select a different date.
3. Select the building, or CTRL-click to select the multiple buildings for which you are changing the hours, and then click **Change**. The Building Hours dialog box opens.

> **Tip:** If you select multiple buildings, then the Building Hours dialog box reflects the hours for the building that is last in the list of selected buildings. You can set the same building hours for multiple buildings at once using the Building Hours Wizard.

4. Set the new hours for the buildings as appropriate.

OPTION	DESCRIPTION
Set Building Hours	Select this option to specify the time period (Open and Close) during which the building is to remain open for the

OPTION	DESCRIPTION
	date. Your EMS Desktop Client users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours. **Note**: EMS Web App users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire day. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do *not* select Web Only, then none of your users (EMS Desktop Client or EMS Web App) can make reservations on this date in the selected buildings.

OPTION	DESCRIPTION
	• If you do you select Web Only, then your EMS Desktop Client users can make reservations on this date in the selected buildings; however, your EMS Web App users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

5. Click **OK** to return to the Building Hours window.

Building Hours Wizard

The Building Hours Wizard streamlines the configuration process and allows users to configure building hours for multiple dates.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > Building Hours. The Building Hours window opens. This window lists all the buildings and their operating hours that are configured in your EMS Desktop Client database.

2. Click Wizard. The Building Hours Wizard opens.

3. Click Add Dates. The Date Pattern dialog box opens.

4. Enter the appropriate date pattern, and then click OK. (Both the Start Date and End Date are required values.) The Date Pattern dialog box closes. You return to the Building Hours Wizard. The dates that meet the pattern that you specified are displayed in the Building Hours Wizard. If any of the dates that meet the pattern are holidays, then the name of the holiday is displayed next to the date.
5. To view information about a date that is marked as a holiday, you can select the date, and then click Special Dates. To remove any dates from the list, you can select the date, or CTRL-click to select multiple dates, and then click Remove.
6. Click Next. The Building Hours Wizard is updated with a list of the buildings that have been configured in your EMS Desktop Client database.

Building Hours Wizard with a list of configured buildings

7. Select the buildings for which you are configuring the same hours, and then use the arrow button to move the buildings to the Selected list.
8. Click Next. The Building Hours Wizard is updated with options for configuring the building hours for the selected buildings.
9. Set the new hours for the buildings as appropriate.

OPTION	DESCRIPTION
Set Building	Select this option to specify the time period (Open and Close) during which the building is to remain open for the

OPTION	DESCRIPTION
Hours	date. Your EMS Desktop Client users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours. Note: EMS Web App users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire day. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. • If you do not select Web Only, then none of your users (EMS Desktop Client or EMS Web App) can make reservations on this date in the selected buildings. • If you do you select Web Only, then your EMS Desktop Cli-

OPTION	DESCRIPTION
	ent users can make reservations on this date in the selected buildings; however, your EMS Web App users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire holiday.

10. Click Finish. The Building Hours Wizard closes. You return to the Building Hours window.

Configure Areas

An *area* is a particular region of indefinite boundary that is used to group buildings, for example, Southeast Region, Campus Wide, Training Sites, and so on. You can use an area as search criteria in EMS and EMS Web App, in reporting, and so on. When you configure an area, you must specify the buildings that are to be included in the area.

> **Note:** You can configure areas only in EMS Enterprise. You cannot configure areas in EMS Professional.

1. On the EMS menu bar, click Configuration > Facilities > **Areas**. The Areas window opens. This window lists all the areas that are currently configured in your EMS database.

2. Click **New**. The Area dialog box opens. The Area tab is the active tab.

Tips: In the **Area** field, enter a name or description for the new area, for example, *Southeast Region*.The area can be a maximum of 50 characters, including spaces.

In the **Notes** field, you can enter additional information that is pertinent for the area.

For EMS Web App users to be able to see and filter by this area, select the **Available to Everyday Users** checkbox.

3. Open the Buildings tab, and on the Available list, select the building,(CTRL-click to select multiple buildings) you want included in the Area, and then Move to the (>) Selected list.

> **Tip:** You can click **Spelling** to spell-check the area description before you save the area.

4. Click **OK**. The Area dialog box closes. You return to the Areas window with the newly configured area automatically selected.

Configure Room Types

A *room type* is the class or category of the room, for example a meeting room, an auditorium, a workspace, a multi-purpose room, and so on. Users can use room types to filter search results.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > **Room Types**. The Room Types window opens. This window lists all the room types that are currently configured in your EMS database.

Room Types Window

2. Click **New**. The Room Type dialog box opens.
3. In the **Room Type** field, enter a name or description for the new room type. The room type can be a maximum of 50 characters, including spaces.
4. If you want EMS Web App users to see this room type when they are searching for available space, leave **Available to Everyday Users** selected.
5. Click **OK**. The Room Type dialog box closes. You return to the Room Types window with the newly configured room type automatically selected.

> Tip: You Can Use "Override" Rooms to Classify Un-Configured Space

An Override Room is used in EMS to loosely define useable space which is not formally configured. For example, a building may have private offices which are not configured as spaces available for public use, but you may need to select such a space for an attendee who is participating remotely in a video conference. In order to provide company employees the ability to schedule meetings in these private rooms, Override Rooms can be configured in EMS.

CONFIGURE AN OVERRIDE ROOM

1. Name the space in a way that indicates an Override Room (for example, "Override Area1”).
2. Classify the room as "Override Description.”

In the example above, "Override Area 1” can be used repeatedly to serve as a placeholder for any meeting request which will occur in an un-configured space.

For example, on Monday a user makes a reservation for "Override Area 1” and names it "Meeting in Mike Thompson’s Office,” and on Wednesday another user makes a reservation for "Override Area 1” and names it "Meet Guests in Lobby Reception Area Prior to Building Tour” EMS does not track availability for events booked in Override Rooms; however, EMS reports on events that are scheduled in an override room as it would for an event scheduled for any other room.

Configure Setup Types

Setup type is the physical layout or arrangement of a room, for example, classroom, conference, theater-style, rounds of 6, as-is, and so on. Setup types predefine rooms for a smoother booking process. Although configuring setup types is not required, setup type is used for defining the capacity for a room, which is helpful information for the staff at your organization who prepare rooms for an event. Also, when you configure a room, you can note, by setup type, the capacity for the room. When searching for available space, your users can use setup types and capacities to filter their search results.

1. On the menu bar, click Configuration > Facilities > Setup Types. The Setup Types window opens. This window lists all the setup types that are currently configured in your database and that have a status of Active

Setup Types window

> Tip: Optionally, to view all setup types in your EMS database, regardless of status, under Show, click **Inactive**

2. Click **New**. The Setup Type dialog box opens.

3. In the **Setup Type** field, enter a name or description for the new setup type. The setup type can be a maximum of 30 characters, including spaces.
4. If you want EMS Web App users to be able to see and request this setup type when they are searching for available space, leave **Allow Everyday User Request** option selected.
5. Leave **Inactive** blank to add the setup type as an active type. Optionally, select Inactive to inactive the setup type.
6. Click **OK**. The Setup Type dialog box closes. You return to the Setup Types window with the newly configured setup type automatically selected.

Configuring Features

A ***feature*** is built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. Your users can use features as criteria when they are searching for a room. They can also filter the available rooms that can be reserved for an event by room features. After you configure different room features for your organization, you must indicate which rooms have these features.

1. On the EMS menu bar, click Configuration > Facilities > **Features**. The Features window opens. This window lists all the features that are currently configured in your EMS database.

2. Click **New**. The Feature configuration dialog opens.

3. In the **Feature** field, enter name or description for the feature (maximum of 50 characters, including spaces).
4. If this feature is a video conferencing feature, then select **Tied to Resource**.
5. If you want EMS Web App users to see this feature when they are searching for available space, leave **Available to Everyday Users** selected.
6. Click **OK**. The Feature configuration dialog closes. You return to the Features window with the newly configured feature automatically selected.

Configuring Floors

A floor is optional information when you are defining a room and when you are searching for a room. A room can be assigned to only a single floor. Example of floors include First Floor, Basement, and Garden Level. When you configure a floor, you must provide a floor name and a sequence.

1. On the EMS Desktop Client menu bar, click Configuration > Facilities > Floors. The Floors configuration page opens to show all the floors that are currently configured in your EMS database.

Floors Configuration Page

2. Click New. The Floor Configuration dialog box opens.

3. In the Floor field, enter a name or description for the new floor (maximum of 50 characters, including spaces).

4. Optionally, in the Sequence field, enter a sequence for the new floor. The sequence determines the order in which the floors are displayed in the Floor dropdown list. The lower the sequence number, the higher in the list that the floor is displayed. If the sequence is set to the default value of zero for all floors, then the floors are first sorted numerically, and then alphabetically, in the Floor dropdown list.
5. Click OK. The Floor configuration page closes. You return to the Floors window with the newly added floor automatically selected.

Configuring Floor Plans

This optional feature, enabled with an EMS Floor Plans license, allows users to view available rooms and book a space directly from a floor plan image in EMS Web App or EMS Kiosk App.

This topic provides information on:

- Configure Floor Plan Indicators
- Configure a Floor Plan Diagram
- Map a Floor Plan

Configuring floor plans in the Floor Plan module is a three-step process:

1. *Configure the floor plan indicators (*the images used indicate whether a room is available or unavailable for a floor plan). For example, you might use something as simple as a green square to indicate that a room on a floor is available and a red square to indicate that a room on a floor is unavailable.

2. *Configure a floor plan diagram* for each floor of each building for which a floor plan applies. A *floor plan diagram* is a drawing, or outline, usually to scale, that shows the relationships between rooms, spaces, and other physical features for one floor of a building.
3. Map your floor plan indicators to rooms on your diagrams using the Floor Plan Configuration utility.

The availability of each reservable space ultimately determines the indicator (available or unavailable) that shows on a floor plan in EMS Web App or EMS Kiosk App.

CONFIGURE FLOOR PLAN INDICATORS

1. On the EMS menu bar, click Configuration > Facilities > **Floor Plan Indicators**. The Floor Plan Indicators window opens, listing active indicator sets currently configured in your EMS database.

> Tip: To see all indicator sets regardless of status, under Show, click **Inactive**.

2. Click **New**. The Floor Plan Indicator dialog box opens.

3. In the Description field, enter a name or description for the new floor plan indicators (max 50 characters including spaces. You can name indicators something as simply as Indicator Set 1, or if you are using different indicators for different floor plans in different buildings, you could identify them by building, for example, Memorial Student Union indicators, Fifth Floor Conference Room indicators, and so on.
4. Next to the Image field, click **Search** to browse to and select an image to use for the *available* indicator.
5. Next to the Secondary Image field, click **Search** to browse to and select an image to use for the *unavailable* indicator.

Note: The image must be in .gif, .jpeg, .jpg, .bmp, .wmf, or .png format.

6. Click **OK**. Your new floor plan indicators are added as active. Optionally, select Inactive to deactivate the set.

CONFIGURE A FLOOR PLAN DIAGRAM

You must configure one floor plan diagram for each floor that will be available for booking in EMS Web App and the EMS Kiosk App.

1. On the EMS menu bar, click Configuration > Facilities > **Floor Plan Diagrams**. A blank Floor Plan Diagrams window opens.

2. Optionally, in the Building dropdown list, select (all), or select a specific building to see a list of floor plans for all buildings or for the selected building in the window.
3. Click **New**. The Floor Plan Diagram dialog box opens on Floor Plan Diagram tab.

4. In the Description field, enter a name or description for the new floor plan diagram (maximum of 50 characters, including spaces).
5. On the Building dropdown list, select the building for which you are configuring the floor plan diagram.
6. Next to the Image field, **Search** to browse and select the image to use for the floor plan diagram.

Note: Image files must be gif, .jpeg, .jpg, .bmp, .wmf, or .png. Optimal image size is 1024 x 768.

7. Open the Floor Plan Indicators tab, and on the Available list, select the floor plan indicator (CTRL-click to select multiple floor plan indicators) you wish

to use for this diagram, and then Move (>) to the Selected list.

8. Click **OK**. The Floor Plan Diagram dialog box closes and you return to the Floor Plan Diagrams window with the newly configured floor plan diagram automatically selected.

MAP A FLOOR PLAN

1. Log in to the Floor Plan Configuration module; then the Configure Rooms option shows above the Login fields on the main window.

Configure Rooms Option

2. Click **Configure Rooms**. The Configure Rooms page opens.

Configure Rooms Page

3. On the Floor Plan dropdown list, select a floor plan diagram. The available indicators that are associated with the floor plan diagram are displayed below the selected diagram.
4. Drag an available indicator and place it as needed to indicate where a room (reservable space) is located on the floor.
5. Repeat the above steps until you have identified all the reservable spaces on the floor.
6. For each indicator, do the following:

» Click on the indicator to open a Room Details dialog box.

» On the Rooms dropdown list, select the room for the indicator, and then click **Save**.

> **Note:** To filter the list of available rooms, under Filter Options, select a specific floor and/or room type. An indicator is not saved to a floor plan diagram until you select a room for it.

7. Close the Floor Plan Configuration module.

Configure Public Views

A ***public view***, or simply a ***view***, is a grouping of specific rooms that you configure. You use views to organize rooms within one building or across multiple buildings in a manner that makes sense for your organization. For example, you might create a view that includes only the training rooms across all your locations, or you might create a view to manage heavily used conference rooms within a building. A room can be part of multiple views. A user can select a view for changing the information that is displayed in the Reservation Book or for searching for rooms in the Reservation Wizard. A view can also be particularly useful for running reports.

1. On the EMS menu bar, click Configuration > Facilities > **Public Views**. The Public Views window opens. This window lists all the views that are currently configured in your EMS database.

2. Click **New**. The View dialog box opens. The View tab is the active tab.

Tips: In the **Description** field, enter a name or description for the new view (maximum 50 characters, including spaces). In the **Notes** field, you can enter any other pertinent information about the view. If you want EMS Web App users to have read-only access to the view, select **Available to Everyday Users**.

3. Open the **Rooms** tab.

4. Enter any combination of the following search criteria:

» On the **Building** dropdown list, select one of the following–(all) buildings, a specific building, a specific area, or a specific view. If the appropriate building, area, or view is not listed, you can configure it. See Configuring Buildings, Configuring Areas, or Configuring Public Views.

» On the **Room Type** dropdown list, select a specific room type. If the appropriate room type is not listed, you can configure it. See Configuring Room Types.

5. On the **Available** list, select the room (CTRL-click to select multiple rooms) you want included in the view, and then Move (>) to the Selected list.

> **Tip:** You can click **Spelling** to spell check the view description before you save the view.

6. Click **OK**. To return to the Public Views window where your newly configured view is now listed.

Configuration > Resources

OVERVIEW

Resources (also called booking detail items) are the individual items or services that your users can reserve for an event. Resources are grouped by category. For example, a furniture category might contain tables and chairs as the resources. Within a category, you can organize resources by groupings. For example, you might configure Beverages, Entrees, and Desserts groupings for a Food Service category. The Beverage grouping might contain resources such as soda and coffee, the Entrees grouping might contain resources such as fish and beef, and so on. You can configure a resource “from scratch,” or you can copy an existing resource, and then edit the configuration as needed. You can also import resources for a category from a tab-delimited file. If you are configuring resources for either a Catering category or Resources, w Service Order category, the first time that you configure resources for the category, you must configure at least one default service. A service indicates how the resource is to be used or offered. For example, Delivery and Setup, Cleanup, Plated,

Buffet, and so on are possible services for a resource in a Catering category.

You can combine a list of related resources into a package to facilitate the process of adding multiple resources to a booking. Instead of making multiple repeated selections, a user can simply select a single resource package. For example, an Instructor A/V package might include a laser pointer, a mobile microphone, and a flip chart. You can set the price for a package to be the sum total of the prices of the individual resources that make up the package, or you can set a completely different price for the package, for example, if you want to discount the package.

You use production items to define the quantity of components that make up a single resource. For example, a resource called Box Lunch has the following description—a box lunch contains a sandwich, a bag of chips, two cookies, and bottled water. The productions items for the Box Lunch resource therefore are the sandwich (quantity =1), chips (quantity =1), cookie (quantity = 2), and bottled water (quantity =1). This means that if an order for 20 boxed lunches is placed, then the kitchen would need to

produce 20 sandwiches, 20 bags of chips, 40 cookies, and 20 bottled waters. To further define the areas of the kitchen that produce each item, you can define production areas. For example, the Delicatessen area might produce the sandwich, chips, and bottled water, and the Bakery area might produce the cookies.

After you configure a resource for a category, you can also define selections and selection items for the resource. A selection is used when you offer choices with a resource. For example, a resource named Catered Breakfast might have the following description—Catered breakfast includes the choice of one standard entree, two sides, and assorted mini-muffins, juice, and coffee. The standard entree selection might include the selection items of french toast, pancakes, or scrambled eggs. The side selection might include the selection items of bacon, sausage, and sliced fruit. If selection items have been defined for a resource, then an EMS user or an EMS Web App user must make a selection for the resource.

Categories, Resources, and Services: 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 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 there 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; then flipchart and whiteboard would be typical options to add to the event.

> Tip: The following Category Types allow Production Items: Catering, Resources with Service Orders, and Resources Without Service Orders.

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.

Configuring Resources for a Category

Resources (also called booking detail items) are the individual items or services that your users can reserve for an event. Resources are grouped by category. For example, a furniture category might contain tables and chairs as the resources. Although you can use categories to track setup notes, meeting attendees, and activities for a booking, you do not configure resources for these categories. You must configure resources only for service categories.

This topic will provide information to:

- Configure Resources for a Category
- Assign Calculations to a Resource
- Configure Pricing for a Resource
- Associate an Image with a Resource
- Edit Production Items for a Resource

» Exclude Rooms for a Resource

» Create a Package for a Resource

CONFIGURE RESOURCES FOR A CATEGORY

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens. If the appropriate category is not listed, you can configure it.
2. Select the category for which you are configuring the resources. The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Resources Window

3. Optionally, do one or both of the following:

» To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.

» To filter the displayed resources based on the Resource name, in the Filter field, enter a search string (not case-sensitive, but characters must be in exact order).

> Tip: The remainder of this procedure describes how to configure a resource “from scratch.” You can also configure a resource by copying an existing resource. Select the resource that you want to copy, click Copy.

4. On the Resources dialog box, click New. The Resource dialog box opens.

Resource Dialog Box, Resource Tab

Resource

Resource | Calculations | Pricing | Images | Production Items | Excluded Rooms | Audit

Description:

Grouping: (none)

Account: (none)

Sequence: 0

Package:

Use Package Item Prices:

Override Description:

Maintain Inventory:

Quantity Available: 0.00

Internal:

Production Item:

Serves: 0.00

Min. Quantity: 0.00

External Reference:

Alert:

Notes:

Everyday User Application Settings

Available to Everyday Users:

Available At Checkout:

Hide Special Instructions:

Display Alert to Everyday Users:

Inactive

Spelling | OK | Cancel

5. Enter the information for the new resource.

Description	The name or description of the resource. Note: The description can be a maximum of 50 characters, including spaces. Resource items are displayed alphabetically in EMS. As a result, when you are configuring a group of similar items, you might want to start the name of each with a common feature. For example, if you have black, white, and blue linens, a good way to name them would be “Linens, black,” “Linens, white,” and so on.
Grouping	If needed, select a grouping. Note: If no groupings are available, or if the appropriate grouping is not available, you can always configure a grouping, and then edit the resource at a later date to place it in a grouping.

Account	Select the internal account which is to receive the revenue from the use of the resource. Note: If the appropriate account is not available, you can configure it.
Sequence	Enter a number that determines the order in which the resource is displayed in a list with other resources in either EMS or EMS Web App. Resources are ordered from lowest to highest sequence number, with the resource with the lowest sequence number being displayed first. Note: If you leave the sequence set to the default value of zero for all resources, then by default, the resources are displayed alphabetically.
Package	Select this option if the resource is to be a package.

	Note: A package is a collection of related resources.
Use Package Item Prices	Available only if Package is selected. Select this option if the package price is to be the sum total of the prices for the individual resources that make up the package; otherwise, you can define a different price for the package on the Pricing tab.
Override Description	Select this option to allow your EMS users to edit the description when they are adding it to a booking. Note: A common use for this feature is to configure a resource called “Other” for each of your resource categories which users can rename to whatever non-inventory item is needed when they select it.
Maintain Inventory	Select this option if you have a limited number of this item and you want EMS to notify your users if they attempt to overbook it.
Quantity	Available only if you select Maintain Inventory. Enter the number of

Available	resource items of this type that your organization has in its inventory.
External Reference	Links the resource to an outside program if needed.
Internal	Indicates that the resource is internal to your organization. Note: Used for internal reporting purposes only. The resource is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Production Item	Available only if the category to which you are adding the resource has been designated as using production items. Select this option if this resource item is to be a production item.
Serves	The number of users that can be served by the resource. For example, one lunch buffet might serve ten people.
Min. Quantity	The minimum quantity required when selecting the resource.

Alert	Enter a message that is to be displayed when a user adds the resource to a booking in the EMS Desktop Client.
Notes	Any other additional information that is pertinent to the item itself, the use of the item, and so on. Notes displayed in EMS and EMS Web App are printed on confirmations and the Setup Worksheet report.
EMS Web App Settings	
Available to Everyday Users	To have this resource be an available option for EMS Web App users who select this category, leave Available on Web selected. Note: Not available if Override Description is selected (see Override Description above).
Available at Checkout	Select this option if you want this resource to be displayed on the “checkout” page (the last page in the Room Request process) in EMS Web App.

Note: Not available if Available to Everyday Users is not selected.

Hide Special Instructions	Do not show any special instructions for the resource in EMS Web App.
Display Alert to Everyday Users	If an alert has been configured for the resource, then display this alert when a user adds this resource to a booking in EMS Web App.

Tip: You can click Spelling to spell check the information that you entered for the resource before you save it.

6. You can continue to one or more of the subsequent procedures in this topic; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically

selected in the window.

7. After you have configured the resource:

» If this is the first time that you have configured resources for the category, and the category is Catering or Resources, w Service Orders, you must also configure at least one default service type.

» You can define production items for the resource and/or define selections for the resource.

ASSIGN CALCULATIONS TO A RESOURCE

You can assign calculations at the category level, as well. If you have already assigned calculations to a resource's category, then these calculations are automatically applied to new resources for the category. These calculations are displayed in the Selected list after you click OK and save the resource.

1. If needed, open the Resource dialog box , and then open the Calculations tab.

Resource Dialog Box, Calculations Tab

2. On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to apply to this resource, and then click the Move button (>) to move the selected calculations to the Selected list. If the appropriate calculation is not available, you can configure it. See Configuring Calculations.
3. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

CONFIGURE PRICING FOR A RESOURCE

You can also configure the resource price on the Edit Pricing window or when you are configuring rate schedules.

1. If needed, open the Resource dialog box, and then open the Pricing tab.

Resource Dialog Box, Pricing Tab

2. For each rate schedule, select the pricing method, which determines the cost for reserving the resource. (See the table on the next page.) If the appropriate rate schedule is not available, you can configure it.

PRICING METHOD	Description
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours

PRICING METHOD	Description
	column, then the Full Day price is charged for the resource.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Service Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the service (resource). This price can be used in con-junction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the resource to a booking.
Unit	The price that is indicated in the Price column is applied to the resource, regardless of the event time or reserved time for the booking.

3. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and edit the amount as needed.

FIELD	Description
Price	The dollar amount that is used in calculating the resource price for a booking. If the pricing method is Unit, then this value is applied in total to a resource, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a resource, then the actual price, the discount percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a resource, then the system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).

FIELD	Description
Half Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

ASSOCIATE AN IMAGE WITH A RESOURCE

You can associate an image with a resource if the image is in one of the following formats–.gif, .jpeg, .jpg, .bmp, .wmf, or .png and ideally, it should not be larger than 615 x 350 pixels. If you attach an image larger than this, you might not be able to view the image without scrolling. Any images that you associate with the resource are displayed only in EMS Web App. They are not displayed in the EMS Desktop Client.

1. If needed, open the Resource dialog box, and then open the Images tab.

Resource Dialog Box, Images Tab

2. To display an image of the resource in the EMS Web App interface, click New to open the Find Image dialog box, and then browse to and select the image. The Find Image dialog box closes. You remain on the Images tab with an entry for the image displayed on the tab.
3. Optionally, after selecting the image, click in the Web Long Description field and enter a description of the resource. The value that you enter here defines the “long desc” attribute for web content accessibility.

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

EDIT PRODUCTION ITEMS FOR A RESOURCE

The Production Items tab lists all the production items that have been defined in your EMS database. The Production Items tab is available only if you did not select Production Item on the Resource tab when you are configuring the resource.

1. If needed, open the Resource dialog box, and then open the Production Items tab.

Resource dialog box, Production Items tab

2. Optionally, do one or more of the following to filter the production items that are displayed:

» Select a production area. (The default value is (all)).

» To filter the displayed production items based on the Item name, in the Filter field, enter a search string.

» Select Show Selected Only. Only those production items that have previously been selected for the resource are displayed.

3. Select a production item and change the quantity for the item. If you do not want a production item to be assigned to the resource, make sure that the quantity for the item is set to zero.
4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

EXCLUDE ROOMS FOR A RESOURCE

This feature enables you to prevent a resource from being allocated for a specific room.

1. If needed, open the Resource dialog box, and then open the Excluded Rooms tab.

Resource Dialog Box, Excluded Rooms Tab

2. Select the search criteria by which to search for the excluded rooms.

» Building

» Room Type: leave the default value of (all), or select a specific room type.

3. On the Available list, select the room (CTRL-click to select multiple rooms) from which the resource item is to be excluded, and then Move (>) to the Selected list.

4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

CREATE A PACKAGE FOR A RESOURCE

A package is a group of resources. You can combine a list of related resources into a package to streamline booking. For example, an Instructor A/V package might include a laser pointer, a mobile microphone, and a flip chart. You select the items for a resource package on the Package Items tab of the Resource dialog box. You can set the price for a package to be the sum total of the individual resources that make up the package, or you can set an independent price for the package.

> Note: The Package Items tab is available only if you select Package on the Resource tab when you are configuring the resource.

1. If needed, open the Resource dialog box, and then open the Packaged Items tab. The tab displays all the resources that have been configured for

the selected category.

Resource Dialog Box, Package Items Tab

Sequence	Quantity	Grouping	Resource	Serves
0	0	(none)	Catering Notes	0
0	0	(none)	Other Item	0
0	0	Beverage	Gourmet Coffee	0
0	0	Beverage	Individual Juice Assortment	0
0	0	Beverage	Juice - per carafe	5
0	0	Beverage	Soda Assortment	0
0	0	Beverage	Wine Bar	0
0	0	Breakfast	Breakfast in Paris	0
0	0	Breakfast	California Nature Break	0
0	0	Breakfast	The Traditional Continental	0
0	0	Center of the Plate Salads	Fajita Salad	0
0	0	Center of the Plate Salads	Florentine Chicken	0
0	0	Center of the Plate Salads	Grilled Chicken Tortellini	0
0	0	From the Bakery	Donuts - priced per dozen	12
0	0	From the Bakery	Mini Muffins - per dozen	4
0	0	Hot Breakfast	Basic Breakfast	0
0	0	Hot Breakfast	Cinnamon Rolls - per dozen	10
0	0	Hot Breakfast	Danish - per dozen	10
0	0	Hot Breakfast	Deluxe Breakfast	0
0	0	Hot Breakfast	Large Muffins - per dozen	10
0	0	Party Trays	Domestic Cheese Display - Large	40
0	0	Party Trays	Domestic Cheese Display - Small	12
0	0	Party Trays	Gourmet Fruit Tray - Large	40
0	0	Party Trays	Gourmet Fruit Tray - Small	12
0	0	Party Trays	Veggie Tray - Large	0
0	0	Party Trays	Veggie Tray - Small	0

2. Optionally, to filter the display, click Show Selected Only. Only those resource items that have previously been selected to be part of the resource package are displayed.

3. For each resource item that is to be included in the package, double-click in the Quantity field, and then enter the appropriate quantity for the resource item.
4. Continue with any other optional configuration for the resource as needed; otherwise, click OK to close the Resource dialog box and return to the Resources window. The newly configured resource is automatically selected in the window.

Resource Configuration Wizard

When you configure resources for a category, you have the option of configuring a single resource at a time through the Resources window, or you can use the Resource Configuration Wizard to configure multiple resources. You typically use the Resource Configuration Wizard to configure multiple resources that have common properties such as the grouping, the account, and the EMS Web App settings. Instead of configuring these resources individually with these same properties, you can use the Resource Configuration Wizard to configure these resources in a single step.

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.
2. Select the category for which you are configuring the resources. The Resources window opens. This window lists all the resources that are

currently configured in your EMS database for the selected category and that have a status of Active.

3. Optionally, do one or both of the following:

- To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
- To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

4. Click Wizard. The Resource Configuration Wizard opens.

Resource Configuration Wizard

5. Configure the properties as needed for the new resources.

FIELD	DESCRIPTION
Grouping	Select the grouping for the resources. Note: If the appropriate grouping is not available, you can configure it. See “Configuring Groupings for a Resource”.
Account	Select the internal account which is to receive the revenue from the use of the resource. Note: If the appropriate account is not available, you can configure it. See “Configuring Accounts”.
Serves	The number of users that can be served by the resource. For example, one lunch buffet might serve ten people.
Min. Quantity	The minimum quantity of the resource that a user must order.
Internal	Select this option and leave Yes selected to indicate that

FIELD	DESCRIPTION
	the resource is internal to your organization. Note: Used for internal reporting purposes only. The resource is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Available to Every-day Users	If these resources must be available for EMS Web App users who select this category, select this option, and then leave Yes selected. To remove these resources as an option for EMS Web App, select No. Note: Not available if Override Description is selected.
Available at Check-out	If these resources are to be displayed on the “checkout” page (the last page in the Room Request process) in EMS Web App, then select this option, and then leave Yes

FIELD	DESCRIPTION
	selected. Tor remove these resources from the “checkout” page, select No. Note: Not available if Available to Everyday Users is not selected.
Active	To add the resources as active resources to the EMS database, select this option, and then leave Yes selected. To inactivate these resources, select No.

6. Click Next. The second page of the Resource Configuration Wizard opens. All the resources that are currently configured in your EMS database for the selected category and that have a status of Active are displayed on the page.

Resource Configuration Wizard, Second page

> Tip: Optionally, to show all resources for the category that are in your EMS database regardless of status, under Show, click Inactive.

7. On the Available list, select the resource, or CTRL-click to select the multiple resources that you are configuring with these properties, and then click the Move button (>) to move the selected resources to the Selected list.
8. Click Finish. A message appears indicating that the resource properties

were set successfully.

9. Click OK. The message and the Resource Configuration Wizard close.

> Tip: You must configure the other properties for the resources, such as the pricing, individually. See “Configuring Resources for a Category”.

Importing Resources for a Category

You can import resources for a category from a tab-delimited file. (See Import File Specifications for the import file specifications.) After you import the resources, you can edit their configurations as necessary.

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.
2. Select the category for which you are importing the resources. The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Example of a Resources Window

3. Optionally, do one or both of the following:

» To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.

» To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

> Tip: The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Cold returns Cold Boxed Lunches, but not Sandwiches (Cold).

4. Click Import. The Import Resources dialog box opens.

Import Resources dialog box

5. Click the Search icon to open the Find Resource Import File dialog, and then browse to and select the resource file that is to be imported.
6. On the Rate Schedule dropdown list, select the rate schedule that applies to the resource. (See “Rate schedules”.)

7. Click Import. A dialog box opens, indicating the number of resources that you are about to import, and asking you if you want to continue.
8. Click Yes. A message appears indicating that the import was successful.
9. Click OK to close the message and return to the Resources window.

Define Resource Selections and Selection Items

After you configure a resource for a category, you can define selections and selection items for the resource. A selection is used when you offer choices with a resource. For example, a resource named Catered Breakfast might have the following description—Catered breakfast includes the choice of one standard entree, two sides, and assorted mini-muffins, juice, and coffee. The selection of standard entree might include the selection items of french toast, pancakes, or scrambled eggs. The side selection items might include bacon, sausage, and sliced fruit. If selection items have been defined for a resource, then an EMS user or an EMS Web App user must make a selection for the resource.

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.

2. Select the category for which you are configuring the resources. The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Example of a Resources window

3. Optionally, do one or both of the following:

- To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
- To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

> Tip: The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Cold returns Cold Boxed Lunches, but not Sandwiches (Cold).

4. Select the resource for which you are configuring the selections, and then click Selections. The Selections window opens. This window lists all the selections that have been configured for the selected resource and that have a status of Active.

Selections Window

> Tip: Optionally, to show all selections for the resource, regardless of status, under Show, click Inactive.

5. Click New. The Selection dialog box opens. The Selection tab is the active tab.

Selection Dialog Box, Selection Tab

6. In the Description field, enter a description or name for the selection, for example, Breakfast Entrees.

> Tip: The description can be a maximum of 255 characters, including spaces.

7. Optionally, do one or more or all the following:

» In the Sequence field, enter a number that determines the order in which the selection is displayed in a list with other selections.

> Tip: Selections are ordered from lowest to highest sequence number, with the selection with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all selections, then by default, the selections are displayed alphabetically.

- In the Min Pick field, enter the minimum number of selection items that a user is required to pick.
- In the Max Pick field, enter the maximum number of selections items that a user is allowed to pick.

> Tip: The maximum pick must be less than or equal to the number of selection items that are configured for the selection.

8. Open the Items tab, and in the Description field, enter a description or name for each selection item.

Tip: The description can be a maximum of 255 characters, including spaces.

Selection dialog box, Items tab

9. Optionally, for each selection item, do one or both of the following:

» In the Sequence field, enter a number to sort the selection items on the tab.

Tip: Selection items are ordered from lowest to highest sequence number, with the selection item with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all selection items, then by default, the selection items are displayed alphabetically.

» In the Notes field, enter any optional information that is pertinent for the item.

10. Click OK. You return to the Selections window with the newly configured resource selection automatically selected.

Configure Services for a Category

When your users are adding details to a booking, if they select a Catering or Resource, w/ Service Order category, they must specify a service. A service indicates how the resource is to be used or offered. For example, Delivery and Setup, Cleanup, Plated, Buffet, and so on are possible services for a resource in a Catering category. If you are configuring resources for either Catering category or Resources, w/ Service Order category, the first time that you configure resources for the category, you must configure at least one default service. You can also configure additional services for a category. See Categories, Resources, and Services: What's the Difference?

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.

2. Select the category for which you are configuring the service type. The Resources window opens., listing all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Resources Window

3. Optionally, do one or both of the following:

- To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
- To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

4. Click Services. The Services window opens. This window lists all the services that are currently configured for the resource in your EMS database and that have a status of Active. Optionally, to view only services in your EMS database, regardless of status, under Show, click Inactive.

Services Window

5. To begin creating a new Service, click New. The Service dialog box opens.

Service Window

6. Enter the information for the new service type.

FIELD	Description
Service	The description or name for the service. The service can be a maximum of 30 characters, including spaces.
Sequence	Enter a number that determines the order in which the service is displayed in a list with other services. Services are ordered from lowest to highest sequence number, with the service with the lowest sequence number being displayed

FIELD	Description
	first. Note: If you leave the sequence set to the default value of zero for all services, then by default, the services are displayed alphabetically.
Available to Everyday Users	If this service is to be an available option for EMS Web App users who select this category, leave Available to Everyday Users selected.
Inactive	Leave this option blank to add the service as an active service. Select this option to inactivate the service.

7. Click OK. The Services dialog box closes. You return to the Services window with the newly configured service automatically selected.
8. Click OK. The Services window closes. The Resources window remains open.

Configuring Groupings for a Resource

Within a category, you can organize resources by Groupings. For example, you might configure Beverages, Entrees, and Desserts groupings for a Food Service category. The Beverage grouping might contain resources such as soda and coffee, the Entrees grouping might contain resources such as fish and beef, and so on. You can configure groupings for a category at the time that you are configuring resources for the category, or you can carry out the configuration as a separate activity.

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.
2. Select the category for which you are configuring the grouping. The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

Resources Window

3. Optionally, do one or both of the following:

- To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.
- To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

4. Click Groupings. The Groupings window opens. This window lists all the groupings that are currently configured in your EMS database for the selected category.

Groupings Window

5. Click New. The Grouping dialog box opens.

6. In the Grouping field, enter a name or description for the new grouping(maximum 50 characters, including spaces).
7. In the Sequence field, enter a number that determines the order in which the groupings are displayed in EMS Web App. Groupings are ordered from lowest to highest sequence number, with the grouping with the lowest sequence number being displayed first. If you leave the sequence set to the default value of zero for all groupings, then by default, the groupings are displayed alphabetically.
8. Click OK. The Grouping dialog box closes. You return to the Grouping window with the newly configured grouping automatically selected.

9. Click Close. The Grouping dialog box closes. The Resources dialog box remains open.
10. Optionally, see Configuring Resources for a Category.

Define Production Areas and Production Items for a Catering Resource

You use production items to define the quantity of components that make up a resource. For example, a resource called Box Lunch contains the following productions items—sandwich (quantity =1), chips (quantity =1), cookie (quantity = 2), and bottled water (quantity =1). If an order for 20 boxed lunches is placed, then the kitchen must produce 20 sandwiches, 20 bags of chips, 40 cookies, and 20 bottled waters. To identify the areas of the kitchen that produce each item, you can define production areas. For example, the Delicatessen area might produce the sandwich, chips, and bottled water, and the Bakery area might produce the cookies. If a category has been defined as using production items, then at the time that you are configuring a resource for the category, you can define the resource as a production item, or you can manually define resources as production items for the category at a later date.

This topic will provide information on:

- Define a New Production Area
- Define a New Production Item.

1. On the EMS menu bar, click Configuration > Resources. The drop-down menu presents a list of all the currently configured resources.

2. Click on the category for which you are configuring the resources; typically, this is a catering type resource. The Resources window opens, listing all active resources for the selected category.

Resources (Catering)

Filter:

Resource (35)	Grouping	Available to Everyday Users
Basic Breakfast	Hot Breakfast	Yes
Breakfast in Paris	Breakfast	Yes
California Nature Break	Breakfast	Yes
Catering Notes	(none)	
Cinnamon Rolls - per dozen	From the Bakery	Yes
Club Gourmet Sandwich	Stack & Wrapped Selections	Yes
Danish - per dozen	From the Bakery	Yes
Deluxe Breakfast	Hot Breakfast	Yes
Domestic Cheese Display - Large	Party Trays	Yes
Domestic Cheese Display - Small	Party Trays	Yes
Donuts - priced per dozen	From the Bakery	Yes
Fajita Salad	Center of the Plate Salads	Yes
Florentine Chicken	Center of the Plate Salads	Yes
Gourmet Coffee	Beverage	Yes
Gourmet Fruit Tray - Large	Party Trays	Yes
Gourmet Fruit Tray - Small	Party Trays	Yes
Grilled Chicken Boursin Sandwich	Stack & Wrapped Selections	Yes
Grilled Chicken Tortellini	Center of the Plate Salads	Yes
Herbed Beef Tenderloin	Plated Affairs	Yes
Individual Juice Assortment	Beverage	Yes
Juice - per carafe	Beverage	Yes
Large Muffins - per dozen	From the Bakery	Yes
Mini Muffins - per dozen	From the Bakery	Yes
Other Item	(none)	
Pecan Crusted Chicken	Plated Affairs	Yes
Roasted Pork Loin with Peppercorn Sauce	Plated Affairs	Yes
Soda Assortment	Beverage	Yes

New
Edit
Delete
Print
Wizard
Copy
Selections
Pricing
Groupings
Services
Prod. Items
Import

Show
☑ Active
☐ Inactive

Close

Tip: To see all resources that have been configured for a category, regardless of status, under Show, click Inactive.

3. Click Prod. Items. The button will not be available if the resource category has not been defined to allow Production Items (only Catering and Resources with or without Service Orders allow Production Items). The Production Item window opens, listing all active production items that have been defined for a category. See Also: Configuring Categories.

> Tips: You can filter the displayed production items based on the Production Area, on the Production Area dropdown list, select an area.

To see all production items that have been defined for the category regardless of status, under Show, click Inactive.

To filter the list by item name, in the Filter field, enter a keyword. This search term is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of "Cold" returns Cold Boxed Lunches, but not Sandwiches (Cold).

DEFINE A NEW PRODUCTION AREA

1. Click Prod. Areas. The Production Areas window lists active Production Areas that have been configured for the selected category and that have a status of Active.

Tip: To see all production areas for the category that are in your EMS database regardless of status, under Show, click Inactive.

2. Click New. The Production Area dialog box opens.

3. Enter a description or name for the production area. The description can be a maximum of 50 characters, including spaces.
4. Leave Inactive blank to add the production area as an active area.

   Select Inactivate to inactivate the production area.
5. You can click Spelling to spell check the description before you save the production area.
6. Click OK. The Production Area dialog box closes. You return to the Production Areas window with the newly configured production area automatically selected.

DEFINE A NEW PRODUCTION ITEM.

1. Navigate to the Production Items window. Click New. The Production Item dialog box opens.

2. In the Description field, enter description or name for the production item. The description can be a maximum of 50 characters, including spaces.
3. Optionally, on the Production Area dropdown list, select a production area for the item.
4. Click OK. You return to the Production Items window with the newly configured production item automatically selected.

5. Click Close on the Production Items window to close the window and return to the Resources window.
6. On the Resources window, select the resource for which you are configuring the production items, and then click Edit. The Resource dialog box opens.
7. Open the Production Items tab for the resource, and for each appropriate production item, enter the quantity.
8. Click OK to close the Resource dialog box and save the resource with its production items.

Configure the Pricing for a Resource on the Edit Pricing Window

You can configure the pricing for a resource on the Pricing tab of the Resource dialog box, or you can configure the resource, and then configure the pricing for it at a later date on the Edit Pricing window.

> Tip: You can also configure the resource price at the time that you are configuring rate schedules (see Configuring Rate Schedules).

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.
2. Select the category for which you are pricing the resources. The Resources window opens. This window lists all the resources that are currently con-

figured in your EMS database for the selected category and that have a status of Active.

Example of a Resources window

3. Optionally, do one or both of the following:

» To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.

» To filter the displayed resources based on the Resource name, in the Filter field, enter a search string.

> Tip: The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Cold returns Cold Boxed Lunches, but not Sandwiches (Cold).

4. Click Pricing. The Edit Pricing window opens.

5. On the Rate Schedule dropdown list, select the rate schedule for which you are pricing the resources.
6. Do one of the following:

» Leave the Grouping set to the default value of (all), and then click Display to display a list of all active resources in all the groupings that have been configured for the selected category.

» On the Grouping dropdown list, select a specific grouping, and then click Display to display a list of all active resources in the grouping.

7. For each resource, select the pricing method, which determines the cost for reserving the resource.

> Tip: If the appropriate rate schedule is not available, you can configure it. See Configuring Rate Schedules.

Pricing Method Fields

PRICING METHOD	DESCRIPTION
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the resource. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the

PRICING METHOD	DESCRIPTION
	resource. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the resource.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly	The price that is indicated in the Price column is mul-

PRICING METHOD	DESCRIPTION
(Service Time)	tiplied by the reserved time (in hours) for the service (resource). This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding the resource to a booking.
Unit	The price that is indicated in the Price column is applied to the resource, regardless of the event time or reserved time for the booking.

8. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and then edit the amount as needed.

FIELD	DESCRIPTION
Price	The dollar amount that is used in calculating the resource price for a booking. If the pricing method is Unit, then this value is applied in total to a resource, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a resource, then the actual price, the discount percentage, and the discounted amount are displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a resource, then the system compares this value to the calculated hourly rate and applies

FIELD	DESCRIPTION
	the lesser of the two charges.
Flat Price	A resource price that remains constant regardless of the total number of hours booked for the resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Hours	Multiplier used in calculating the resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

9. Repeat Step 5 through Step 8 for each rate schedule and/or grouping as needed.
10. Click Close. The Edit Pricing window closes. The pricing information is saved for the resource.

Export Pricing Information for a Resource

You can export any pricing information that you configure for a resource on a per rate schedule basis on the Edit Pricing window. The information is exported to a Microsoft Excel file.

Concept: You Can Assign Rate Schedules to Specific Rooms and Resources.

After you define your organization's rate schedules, you have three options for manually assigning the prices to billable items (rooms and resources) based on these schedules:

1. Configuring Rooms. When you are configuring a room or resource, the configuration dialog box contains a Pricing tab. This tab lists all the rate schedules that are currently configured in your EMS database. You can specify the pricing method for the billable item that you are configuring for each rate schedule. You can also specify a discount percentage for the item, a

minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Resources for a Category.)

2. Configure the Pricing for a Resource on the Edit Pricing Window. Both the Rooms window and the Resources window contain a Pricing button. You can click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for the billable items (rooms and resources) for a selected rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Resources for a Category.)
3. Configure Rate Schedules. The Rate Schedules window has a Pricing button. After you have defined a rate schedule, you can select a rate schedule in the Rate Schedules window and click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for every billable item for the rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options.

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which

you can configure resources opens.

2. Select the category for which you are pricing the resources. The Resources window opens. This window lists all the resources that are currently configured in your EMS database for the selected category and that have a status of Active.

3. Optionally, do one or both of the following:

» To view all resources for the category in your EMS database, regardless of status, under Show, click Inactive.

» To filter the displayed resources based on the Resource name, in the Filter field, enter a search string. The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Cold returns Cold Boxed Lunches, but not Sandwiches (Cold).

4. Click Pricing. The Edit Pricing window opens.

5. On the Rate Schedule dropdown list, select the rate schedule for which you are exporting the pricing information.

6. Do one of the following:

» Leave the Grouping set to the default value of (all), and then click Display to display a list of all active resources and their prices in all the groupings that have been configured for the selected category.

» On the Grouping dropdown list, select a specific grouping, and then click Display to display a list of all active resources and their pricing in the grouping.

7. Click Export. A Save As dialog box opens. The export file is named Pricing.xls by default.
8. Optionally, edit the name of the export file, and then save the file to a location of your choice. An Export Report message opens indicating that the export was successful and asks you if you want to preview the exported file.
9. Do one of the following:

» Click Yes to open the export file in Microsoft Excel. After viewing the file, you can close it to return to the Edit Pricing window.

» Click No to close the message and return to the Edit Pricing window.

10. Repeat Step 5 through Step 9 for each rate schedule and/or grouping for which you are exporting the information.
11. After you have exported all the necessary pricing information for a resource, click Close. The Edit Pricing window closes. The Resources window remains opens.

Configuration > Billing

OVERVIEW

Before you can use EMS to manage your organization's events, you must configure core data items that are specific to your organization. For example, before you can automatically price items in a reservation, you must first configure rate schedules and pricing plans.

Initial configuration for billing in EMS Desktop Client is extensive. If your organization uses EMS for revenue and billing, please consult your Professional Services representative for assistance. Consider configuring your billing information in phases:

- EMS Billing Concepts
- Configure Accounts
- Configure Currencies
- Configure Billing Reference and PO Numbers
- Configure Payment Types
- Configure Sales Categories

- Calculations
- Pricing Plans
- Configure Rate Schedules

In EMS, rate schedules and pricing plans allow you to define the pricing for your resources and rooms so that the pricing is automatically applied to the resources or rooms when a reservation is made.

EMS BILLING CONCEPTS

RATE SCHEDULES

A rate schedule is a pricing sheet that lists prices for billable items in your EMS database. For example, if your organization is an academic organization, then at the most basic of levels, you would configure three different rate schedules for the three primary groups that book events at your facilities—an Internal group (students, faculty, staff, and so on), an External group (outside organizations that are not affiliated with your organization in any way), and an Alumni group. These rate schedules

could detail the prices for such things as the room charge, A/V equipment charges, catering charges, and so on.

Rate Schedule Example

Rate Schedule	Billable Item: Video Projector Pricing
Internal	$20.00/hour (reserved time). 100% discount
External	$20.00/hour (reserved time). $50.00 minimum. 5% Tax.
Alumni	$20.00/hour (reserved time). $50.00 minimum. 5% Tax. 25% discount.

Four factors affect how pricing is applied for a rate schedule

1. Pricing method (flat rate, hourly rate, and so on)
2. Calculations (taxes, gratuities, and so on)
3. Discount percentage
4. Minimum/maximum charge

You specify the pricing method, and if applicable, the discount percentage, and the minimum and maximum charges when you assign the prices to billable items based on your rate schedules. You can assign

calculations directly to a category, a group, a group type, a resource, or a room or you can assign calculations through pricing plans. (See Calculations.)

RATE SCHEDULES AND BILLABLE ITEMS (ROOMS AND RESOURCES)

After you define your organization's rate schedules, you have three options for manually assigning the prices to billable items (rooms and resources) based on these schedules:

» During the configuration of a room or resource. When you are configuring a room or resource, the configuration dialog box contains a Pricing tab. This tab lists all the rate schedules that are currently configured in your EMS database. You can specify the pricing method for the billable item that you are configuring for each rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Rooms and Configuring Resources for a Category.)

- After all necessary rooms and resources are configured. Both the Rooms window and the Resources window contain a Pricing button. You can click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for the billable items (rooms and resources) for a selected rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Rooms and Configuring Resources for a Category.)
- Where rate schedules are defined. The Rate Schedules window has a Pricing button. After you have defined a rate schedule, you can select a rate schedule in the Rate Schedules window and click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for every billable item for the rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configure Rate Schedules.)

CALCULATIONS

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or

sales tax. A calculation can be applied to a resource item every time a group uses the item, or the calculation can be applied only when a particular pricing plan is used for a group's reservation. For a calculation to be applied every time a group uses a resource item, the calculation must be defined not only for the resource item, but also, for the group that is using the item. For a calculation to be applied to a resource item on as-needed basis, then you must use pricing plans.

PRICING PLANS

A pricing plan bundles rate schedules. When your users apply a pre-configured pricing plan to a reservation, EMS automatically calculates the pricing for the billable items that are reserved for an event.

You can use a pricing plan to customize the pricing for a specific group type or even a specific group. When you configure a group type or group, you can assign a default pricing plan to the group type or group. When your users book a reservation for the group type or group, then the default pricing plan is applied to the reservation and EMS automatically cal-

culates the pricing for the billable items that are reserved for the group's reservation. For example, consider the following rate schedules:

RATE SCHEDULE	CHARGES
Internal	» Room Charge - $10/hour (event time). 100% discount. » A/V (for example, overhead projector) - $20/unit. 100% discount.
External	» Room Charge - $10/hour (event time). $50 minimum. » A/V (for example, overhead projector) - $20/unit.
Alumni	» Room Charge - $10/hour (event time). $50 minimum. 25% discount. » A/V (for example, overhead projector) - $20/unit. 25% discount.
Standard	» Catering (for example, coffee) - $5/unit. 5% sales tax.

Based on the rate schedules that are defined above, you would configure your pricing plans as shown in the example below.

Pricing Plans Example

Internal	Room Charge	Internal
	A/V	Internal
	Catering	Standard
External	Room Charge	External
	A/V	External
	Catering	Standard
Alumni	Room Charge	Alumni
	A/V	Alumni
	Catering	Standard

Note that these three pricing plans do not make a distinction between External for Profit groups and External for Non-Profit groups; however, if you want to customize the pricing so that External for Profit groups pay sales tax, but External Not For Profit groups do not, you could configure the pricing plans listed in the following table.

PRICING PLAN	BILLABLE ITEM	RATE SCHEDULE
Internal	» Room Charge » A/V » Catering	» Internal » Internal » Standard
External for Profit	» Room Charge » A/V » Catering	» External » External » Standard
External Not For Profit	» Room Charge » A/V » Catering	» Alumni » Internal » Standard (No Tax)
Alumni	» Room Charge » A/V » Catering	» Alumni » Internal » Standard

A pricing plan is also required to apply calculations correctly to invoiced items. A calculation can be applied to a resource item every time a group uses the item, or the calculation can be applied only when particular pricing plan is used for a group's reservation. For a calculation to be applied every time a group uses a resource item, the calculation must be defined not only for the resource item, but also for the group that is using the item. For a calculation to be applied to a resource item on as needed basis, then you must use pricing plans. When you are configuring a pricing plan, you have the option to:

- Have no calculations associated with the pricing plan.
- Add charges in addition to what a group already pays.
- Override a group's set charges with different charges.

Also, the pricing for a billable item is determined at the time that the item is reserved for an event. If your users do not select a pricing plan at the time they are making a reservation, no pricing information is retrieved. If your users select a pricing plan after the fact, or if they change the pricing plan for a reservation, then they can update the prices of the billable items

that are reserved for the event only by using the Update Pricing function in the Navigator.

Configure Rate Schedules

When you configure a rate schedule, you can configure one “from scratch,” or you can copy an existing rate schedule and edit the name and any configured pricing as needed to make a new rate schedule. After you configure a rate schedule, you can define the pricing for the billable items (rooms and resources) in the rate schedule.

This topic will include information on the following:

- Configure a Rate Schedule:
- Configure Pricing for Billable Items in a Rate Schedule

> Tip: You Can Assign Rate Schedules to Specific Rooms and Resources.

After you define your organization's rate schedules, you have three options for manually assigning the prices to billable items (rooms and resources) based on these schedules:

- During the configuration of a room or resource. When you are configuring a room or resource, the configuration dialog box contains a Pricing tab. This tab lists all the rate schedules that are currently configured in your EMS database. You can specify the pricing method for the billable item that you are configuring for each rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options.
- After all necessary rooms and resources are configured. Both the Rooms window and the Resources window contain a Pricing button. You can click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for the billable items (rooms and resources) for a selected rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Rooms and Configuring Resources for a Category)

» Where rate schedules are defined. The Rate Schedules window has a Pricing button. After you have defined a rate schedule, you can select a rate schedule in the Rate Schedules window and click Pricing to open an Edit Pricing window. You can use the options on this window to specify the pricing method for every billable item for the rate schedule. You can also specify a discount percentage for the item, a minimum charge for the item, a maximum charge for the item, or any combination of these options. (See Configuring Rate Schedules)

CONFIGURE A RATE SCHEDULE:

1. On the EMS menu bar, click Configuration > Billing > Rate Schedules. The Rate Schedules window opens. This window lists all the rate schedules that are currently configured in your EMS database.

2. Click New. The Rate Schedule dialog box opens.

3. In the Rate Schedule field, enter a name or description for the new rate schedule (maximum of 30 characters, including spaces).

4. Click OK. The Rate Schedule dialog box closes. You return to the Rate Schedules window with the newly configured rate schedule automatically selected.

CONFIGURE PRICING FOR BILLABLE ITEMS IN A RATE SCHEDULE

1. If you have not already done so, open the Rate Schedule window (click Configuration > Billing > Rate Schedules) and then select the rate schedule for which you are configuring the pricing for billable items.
2. Click Pricing. The Edit Pricing window opens.

3. Do one of the following:

- To configure the pricing for a resource category, on the Category dropdown list, select the category, and then click Display.
- Optionally, on the Grouping dropdown list, select a resource grouping to filter the search results.
- To configure the pricing for rooms, on the Category dropdown list, select Room Charge.

All rooms in all buildings that are currently configured in your EMS database are displayed in the lower pane of the dialog box.

- On the Building dropdown list, select a specific building, area, or view to filter the search results.
- On the Grouping dropdown list, select a room type to filter the search results.

4. For each billable item (resource or room), select the pricing method, which determines the cost for reserving the item.

PRICING METHOD	DESCRIPTION
Half Day/Full Day (Event Time)	The total number of hours for the event is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the event is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the billable item. If the total number of hours for the event is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item.
Half Day/Full Day (Reserved Time)	The total number of hours for the reservation (event time and reserved time) is counted and then compared to the number of hours that is indicated in the Hours column. If the total number of hours for the reservation is less than or equal to the hours that are indicated in the Hours column, then the Half Day price is charged for the billable

PRICING METHOD	DESCRIPTION
	item. If the total number of hours for the reservation is greater than the hours that are indicated in the Hours column, then the Full Day price is charged for the billable item.
Hourly (Event Time)	The price that is indicated in the Price column is multiplied by the event time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Reserved Time)	The price that is indicated in the Price column is multiplied by the reserved time (in hours) for the booking. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly	The price that is indicated in the Price column is mul-

PRICING METHOD	DESCRIPTION
(Service Time)	tiplied by the reserved time (in hours) for the service. This price can be used in conjunction with an initial “flat” fee, as well as minimum and maximum fees.
Hourly (Specific)	The price that is indicated in the Price column is multiplied by the number of hours indicated when adding a billable item to a booking.
Unit	The price that is indicated in the Price column is applied to the billable item, regardless of the event time or reserved time for the booking.

5. After you select a pricing method, click in the appropriate fields to select the currently displayed amount, and edit the amount as needed.

FIELD	DESCRIPTION
Price	The dollar amount that is used in calculating the room or resource price for a booking. If the pricing method is Unit, then this value is applied in total to the resource or room, regardless of the event time or reserved time for the booking.
Discount	You can use a discount with any pricing method. If you specify a discount for a room or resource, then the actual price, the discount percentage, and the discounted amount are all displayed on confirmations and invoices.
Min. Charge Max. Charge	The values that are indicated in these columns are used in conjunction with the Hourly pricing methods. If you specify a minimum charge for a room or resource, then the system compares this value to the calculated hourly rate and applies the greater of the two charges. Likewise, if you specify a maximum charge for a room or resource, then the

FIELD	DESCRIPTION
	system compares this value to the calculated hourly rate and applies the lesser of the two charges.
Flat Price	A resource or room price that remains constant regardless of the total number of hours booked for a room or resource. Used in conjunction with Hourly (Event Time) and Hourly (Reserved Time).
Half Day Price	The dollar amount that is used in calculating room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).
Full Day Price	The dollar amount that is used in calculating the room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

FIELD	DESCRIPTION
Hours	Multiplier used in calculating the room or resource price for a booking if the pricing unit is Half Day/Full Day (Event Time) or Half Day/Full Day (Reservation Time).

6. Click Close. The Edit Pricing window closes. You return to the Rate Schedules window with the rate schedule automatically selected.

Configure Pricing Plans

A pricing plan bundles different rate schedules. When you configure a pricing plan, you can not only specify different rates schedules for the billable items in the plan, but also you can specify the calculation that is to be applied to a billable item when the plan is used for a group's reservation. After you configure pricing plans, you can assign a default plan to a group's record. Whenever a user makes a reservation for the group, the default pricing plan is displayed automatically in the Pricing Plan field on the Billing tab of the Reservation Wizard.

> Tip: To help you keep track of your pricing plans and how they are used (for instance, to keep track of all your discounts), export your pricing plans periodically.

1. On the EMS menu bar, click Configuration > Billing > Pricing Plans. The Pricing Plans window opens. This window lists all the pricing plans that are currently configured in your EMS database and that have a status of Active.

> Tip: Optionally, to view all pricing plans, regardless of status, under Show, click Inactive.

2. Click New. The Pricing Plan dialog box opens. The Pricing Plan tab is the active tab.

3. In the Pricing Plan field, enter a name or description for the new plan (maximum of 30 characters, including spaces).
4. Optionally, on the Calculation Type dropdown list, select the type of calculation that is to be applied to a resource when the plan is used for a group's reservation and then go to Step 5; otherwise, go to Step 6.

» In Addition to Group—The group must pay the calculations that are set for the billable items in the pricing plan in addition to any calculations that it must always pay.

» Override Group—Override any calculations that are defined at the Group level and pay what is defined for the billable items in the pricing plan.

5. Open the Calculations tab, and on the Available list select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this pricing plan, and then click the Move button (>) to move the selected calculations to the Selected list.

> Tip: If the appropriate calculation is not available, you can configure it. See Configure Calculations.

6. Open the Rate Schedules tab, and for each resource category (including Room Charge) that is to have its price set by this pricing plan, double-click in the Rate Schedule field, and then select the appropriate rate schedule from the dropdown list.

Tip: If you do not select a rate schedule for a resource category, or for the Room Charge, then the pricing for these items is set to zero in the pricing plan.

7. Click OK. The Pricing Plan dialog box closes. You return to the Pricing Plans window with the newly configured pricing plan automatically

selected.

Export Pricing Information for Billable Items (Rooms or Resources)

After you configure a rate schedule and define the pricing for the billable items (rooms and resources) in the rate schedule, you can export the pricing information on the Edit Pricing window. The information is exported to a Microsoft Excel file.

> Notes: You do not need Microsoft Excel on your EMS client to export the information to the file; however, you must have Microsoft Excel on your EMS client to view the file. You can also export the pricing information for rooms and resources after you have configured the information for the room or resource. See “Exporting Pricing Information for a Room” and “Exporting Pricing Information for a Resource”.

1. On the EMS menu bar, click Configuration > Billing > Rate Schedules. The Rate Schedules window opens. This window lists all the rate schedules that are currently configured in your EMS database.

2. Click Pricing. The Edit Pricing window opens.

3. Do one of the following:

» To export the pricing information for a room or rooms, on the Category drop-down list:

» Select Room Charge.

All active rooms in all buildings that are currently configured in your EMS database are displayed in the lower pane of the dialog box.

» Optionally, on the Building dropdown list, select a specific building, area, or view to filter the search results.

- Optionally, on the Grouping dropdown list, select a room type to filter the search results.
- To export the pricing information for all the resources in a category, on the Category dropdown list:
- Select the category, and then click Display.
- Optionally, on the Grouping dropdown list, select a resource grouping to filter the search results.

4. Click Export. A Save As dialog box opens. The export file is named Pricing.xls by default.
5. Optionally, edit the name of the export file, and then save the file to a location of your choice. An Export Report message opens indicating that the export was successful and asks you if you want to preview the exported file.
6. Do one of the following:

- Click Yes to open the export file in Microsoft Excel. After viewing the file, you can close it to return to the Edit Pricing window.
- Click No to close the message and return to the Edit Pricing window.

7. Repeat Step 3 through Step 6 for each room or resource for which you are exporting the pricing information.
8. After you have exported all the necessary pricing information, click Close. The Edit Pricing window closes. The Rate Schedule dialog box remains open.

Configure Calculations

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. Both pricing methods and calculations determine the final cost for a billable item; however, unlike pricing, which is applied when a billable item is reserved (and retained, even if the price for the item later changes), calculations are figured each time a confirmation or an invoice is generated. When you configure a calculation, you must specify the rate for the calculation, the calculation sequence (the order in which the calculation is carried out relative to other calculations), and if applicable, the minimum charge for the calculation. You must also indicate whether the calculation should be carried out on the base amount or on a running total, and whether the result of the calculation should be added to the base amount and then considered in subsequent calculations. For example, consider the following four calculations for a base amount of $1,000.00:

ITEM	CALCULATED ON	CALCULATION RESULT	RUNNING TOTAL
• Gratuity 10% • Calc Sequence = 1 • Calc on Base = Yes • Calc Incl in Tot = Yes	$1000	$100	$1100
• Sales Tax 5% • Calc Sequence = 2 • Calc on Base =	$1100	$55	$1155

ITEM	CALCULATED ON	CALCULATION RESULT	RUNNING TOTAL
No • Calc Incl in Tot = Yes			
• State Tax 5% • Calc Sequence = 3 • Calc on Base = Yes • Calc Incl in Tot = No	$1000	$50	$1155
• Federal Tax 10%	$1155	$115.50	$1155

ITEM	CALCULATED ON	CALCULATION RESULT	RUNNING TOTAL
• Calc Sequence = 4 • Calc on Base = No • Calc Incl in Tot = No			
Total Calculations:		$320.50	
Grand Total (Base + Calculations):		$1320.50	

After you configure calculations, you can assign the calculations to a category, group, group type, resource, or room.

TO CONFIGURE CALCULATIONS

1. On the EMS menu bar, click Configuration > Billing > Calculations. The Calculations window opens. This window lists all the calculations that are currently configured in your EMS database and that have a status of Active.

> Tip: Optionally, to show all calculations, regardless of status, under Show, click Inactive.

2. Click New. The Calculation dialog box opens.

3. Enter the information for the new calculation.

FIELD	DESCRIPTION
Calculation	The name or description for the calculation. Note: The calculation can be a maximum of 30 characters, including spaces.
Account	Optional field. The account within your internal accounting system that should be credited with the revenue.

FIELD	DESCRIPTION
	Note: If the appropriate account is not available, you can configure it. See Configure Accounts.
Currency	The currency symbol that is used to display the results of the calculation.
Rate	The percentage for the calculation rate, for example 5%.
Sequence	The order in which multiple calculations are to be carried out. Note: This value is critical when multiple calculations are to be carried out and the order of the calculations affects the resulting value.
Minimum Charge	Optional field. The minimum charge that is to applied to a billable item for which this calculation applies.

FIELD	DESCRIPTION
Base Include in Total	» Both Base and Include in Total selected—The calculation is carried out on the original base amount. The result of the calculation is added to the current running total to make a new running total. The result is also added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. » Only Include in Total selected—The calculation is carried out on the current running total and the result of the calculation is added to the current running total to make a new running total. The result of the calculation is also added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. » Only Base selected—The calculation is carried out on the original base amount. The result of the calculation is added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out. » Neither Base nor Include in Total selected—The calculation is carried out on the current running total. The res-

FIELD	DESCRIPTION
	ult of the calculation is added to the grand total (Base + All Calculations) that is current at the time that the calculation is carried out.
Inactive	Leave this option blank to add the calculation as an active calculation. Select this option to inactivate the calculation.

4. Click OK. The Calculation dialog box closes. You return to the Calculations window with the newly configured calculation automatically selected.
5. Optionally, continue To Assign Calculations below.

TO ASSIGN CALCULATIONS

After you configure a calculation, you can assign the calculation to a category, group, group type, resource, or room from the Calculations window.

Remember, you also have the option of assigning calculations to a category, group, group type, resource, or room at the time that you are configuring the category, group, group type, resource, or room. The advantage to assigning a calculation after you configure it is that you can assign the calculation to multiple items in a single step.

1. If needed, click Configuration > Billing > Calculations to open the Calculations window.
2. Click Assign. The Assign Calculations dialog box opens.

3. On the Calculation dropdown list, select the calculation that you are assigning.
4. On the Assign To dropdown list, select the item (category, group, group type, resource, or room) to which you are assigning the calculation.

ITEM SELECTED	COMMENTS
Category	A list of all categories that are currently configured in your EMS database is displayed. If you assign a calculation at the category level, then the calculation is assigned to all resources that are configured for the category. To assign a calculation to a specific resource in a category, then select Resource on the Assign To dropdown list.
Group	A list of all groups that are currently configured in your EMS database is displayed. Two additional fields are displayed—Group Type and Starts with. Optionally, select a Group Type and/or enter a search string in the Starts with Field to filter the list of groups that are displayed.

ITEM SELECTED	COMMENTS
Group Type	A list of all group types that are currently configured in your EMS database is displayed.
Resource	A Category dropdown list opens. Select the appropriate category for the resource. A list of all resources that are currently configured for the selected category in your EMS database is displayed.
Room	A Building dropdown list opens. Select the appropriate building. A list of all the rooms that are currently configured for the selected building in your EMS database is displayed.

5. On the Available list, select the item, or CTRL-click to select the multiple items to which the calculation is being assigned, and then click the Move button (>) to move the selected items to the Selected list.

6. Click Close. The Assign Calculations dialog box closes. You return to the Calculations window.

Configure Accounts

EMS uses accounts to indicate where the monies that your organization receives for billable items should be deposited, based on your internal accounting system.

> Note: Accounts in EMS are used for reporting purposes only. EMS does not provide any functions for physically moving funds.

Examples of accounts include the following:

- Facilities Account
- Catering Fees Account
- Miscellaneous Charges Accounts

Income for each resource or room is recorded into only one account. The account that is credited typically corresponds to the operational department that receives the income credit for the sale of the resource or room.

For instance, in this model, room charges might be credited to the Facilities Account and food and beverage resources would be credited to the Catering Account. When you configure an account, you must specify both an account name and an account code. After you configure accounts, you can use them to label billable items (rooms, equipment items, and so on). If you invoice out of EMS, then you can run the General Ledger Distribution report to group your receivables by account.

TO CONFIGURE ACCOUNTS

1. On the EMS menu bar, click Configuration > Billing > Accounts. The Accounts window opens. This window lists all the accounts that are currently configured in your EMS database.

Accounts Window

2. Click New. The Account dialog box opens.

Account Dialog Box

3. Enter the information for the new account.

FIELD	DESCRIPTION
Description	The name or description for the account. Note: The description can be a maximum of 50 characters, including spaces.
Account	The code for the account. Typically, this is numerical, but it can be abbreviated text that conveys the account name or description. Note: The code can be a maximum of 50 characters, including spaces.

4. Click OK. The Account dialog box closes. You return to the Accounts window with the newly configured account automatically selected.

Configure Payment Types

A payment type indicates the forms of payment that your organization accepts. Payment types are also used to track the forms of payment that your groups are using. Examples of payment types include checks, credit card, and cash. Because payment types are for informational purposes only and do not affect the pricing or billing of an event, configuration of payment types is not required; however, after you configure payment types, you can assign a default payment type to a group's record. Whenever a user makes a reservation for the group, the default payment type is displayed automatically in the Payment Type field on the Billing tab of the Reservation Wizard.

1. On the EMS menu bar, click Configuration > Billing > Payment Types. The Payment Types window opens. This window lists all the payment types that are currently configured in your EMS database and that have a status of Active.

> Tip: Optionally, to show all payment types, regardless of status, under Show, click Inactive.

2. Click New. The Payment Type dialog box opens.

3. In the Payment Type field, enter a name or description for the new payment type.

> Tip: The payment type can be a maximum of 30 characters, including spaces.

4. Leave Inactive blank to add the payment type as an active payment type. Optionally, select Inactive to inactivate the payment type.
5. Click OK. The Payment Type dialog box closes. You return to the Payment Types window with the newly configured payment type automatically selected.

Configure Sales Categories

You can configure sales categories to sort your groups for the purposes of tracking sales figures. For example, you could sort your groups based on local, regional, and national sales figures. Because sales categories are for informational purposes only and do not affect the pricing or billing of an event, configuration of sales categories is not required; however, after you configure sales categories, you can assign a default category to a group's record. Whenever a user makes a reservation for the group, the default sales category is displayed automatically in the Sales Category field on the Billing tab of the Reservation Wizard.

1. On the EMS menu bar, click Configuration > Billing > Sales Categories. The Sales Categories window opens. This window lists all the sales categories that are currently configured in your EMS database and that have a status of Active.

> Tip: Optionally, to show all sales categories regardless of status, under Show, click Inactive.

2. Click New. The Sales Category dialog box opens.

3. In the Sales Category field, enter a name or description for the new sales category.

> Tip: The sales category can be a maximum of 30 characters, including spaces.

4. Leave Inactive blank to add the sales category as an active category. Optionally, select Inactive to inactivate the sales category.
5. Click OK. The Sales Category dialog box closes. You return to the Sales Categories window with the newly configured sales category automatically selected.

Configure Billing Reference and PO Numbers

When you configure billing reference numbers and PO numbers, they are assigned to a “master list.” When end-users are making a reservation or submitting a reservation request, they can look up the available billing references or PO numbers on this master list and assign the appropriate value to the reservation or request. Because billing references and PO numbers are for informational purposes only and do not affect the pricing or billing of an event, configuration of these items is not required; however, after you configure billing references and PO numbers, you can assign a default value to a group’s record. Whenever a user makes a reservation for the group, the default value is displayed automatically in the Billing Reference field and/or PO number field on the Billing tab of the Reservation Wizard, but a user can change the values if needed.

> Note: The following procedure is written from the perspective of billing reference numbers; however, by analogy, you can follow this procedure to configure PO numbers.

1. On the EMS menu bar, click Configuration > Billing > Billing Reference Numbers. The Billing Reference Numbers window opens. This window lists a specific number of billing references that are currently configured in your EMS database and that have a status of Active.

> Tip: You can set the specific number of records that are to be returned under Options in the top right corner of the Billing References window.

Billing Reference Numbers Window

2. Optionally, do one or more of the following:

» Click Options, and then select a different number of records that are to be returned in the window.

» To filter the list based on the Billing Reference, enter a search string in the Find field, and then click Display.

> Tip: The string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the

nformation for which you are searching. For example, a search string

f Alu returns AlumniNE, but not NEAlumni.

» To show both active and inactive billing references, under Show, click Inactive.

3. Click New. The Billing Reference Number dialog box opens.

4. Enter information for the billing reference number.

FIELD	DESCRIPTION
Billing Reference Number	Required field. Alphanumeric data allowed. Note: The number can be a maximum of 100 characters, including spaces.
Description	A name or description for the billing reference number. Note: The description can be a maximum of 50 characters, including spaces.
Notes	Any additional information that is pertinent for the billing reference. Note: This field is available for reporting in the Query Builder. See the EMS User's Manual.

5. Leave Inactive blank to add the item as an active billing reference. Select Inactive to inactivate the billing reference.
6. Optionally, to check the spelling for the billing reference before you save it, click Spelling.
7. Click OK. The Billing Reference Number dialog box closes. You return to the Billing Reference Numbers window with the newly configured reference automatically selected.

> Tip: The following Administration parameters control the name of the Billing Reference and PO fields: Billing Reference Title Singular, Billing Reference Title Plural, PO Number Title Singular, PO Number Title Plural.

Establish Billing Reference and PO Behavior

Billing Reference and PO numbers can be added to rooms and services. As an Admin, you can customize the behavior of these fields and when and where they appear and are required at many levels.

The lowest level where you set Billing Reference and PO field behavior (All Reservations, Booking Templates, Rooms, Services) overrides other settings.

For example, if you set behavior for a room, it will override settings from a booking template. This ensures that the room billing behavior is not changed by the booking template, so you can always charge for a special room.

From EMS Desktop Client, you can set parameters for all reservations and for each booking template to control whether these fields are

required, validated, and appear to users. You can also configure specific rooms and categories to prompt users to enter values in these fields. For example, you could globally set the Billing Reference field to appear for all reservations in your system, but then you could also set one booking template, a room and a few service categories to also prompt the user for PO numbers. Your settings for the booking template would override the global settings, and the prompts for the room and service categories would override both the global setting and the booking template setting.

This topic will include information on the following:

- Globally Set Behavior for All Reservations
- Set Behavior for a Booking Template
- Set Behavior for a Category
- Set Behavior for a Service
- Set Behavior for a Room to Prompt Users for a Billing Reference

GLOBALLY SET BEHAVIOR FOR ALL RESERVATIONS

You can set global parameters for Billing Reference and PO Number field behavior as shown below in the EMS Desktop Client (System Administration > Settings > Parameters > Everyday User Applications tab):

Parameters

All Applications | Desktop Client | Everyday User Applications | Kiosk

Area: Create/Manage Reservations Filter:

Area (37)	Description	Value
Create/Manage Reservations	Show Billing Reference on Reservation	Yes
Create/Manage Reservations	Billing Reference Validation	Required But Not Validated
Create/Manage Reservations	Exclude Closures From Date Calculations	No
Create/Manage Reservations	Exclude Weekends From Date Calculations	No
Create/Manage Reservations	Default Cancel Reason	(none)
Create/Manage Reservations	Default Pricing Plan	testm
Create/Manage Reservations	Default Room Availability View	Grid
Create/Manage Reservations	PO Number Validation	Required But Not Validated
Create/Manage Reservations	Override Default Room Setup/Teardown Times	No
Create/Manage Reservations	Setup Time in Minutes For All Rooms	0
Create/Manage Reservations	Teardown Time in Minutes For All Rooms	0
Create/Manage Reservations	Reservation Comment Type on Checkout	Comment Type Test
Create/Manage Reservations	Attachments Allowed on Room Request	Yes
Create/Manage Reservations	Allow Temporary Contacts	Yes
Create/Manage Reservations	Attachments Allowed Extensions	.csv,.doc,.gif,.jpg,.pdf,.ppt,.txt,.xls,.xlsx,.tif
Create/Manage Reservations	Default Value for Attendance	1
Create/Manage Reservations	Hide Daily Recurrence Option	No
Create/Manage Reservations	Hide Monthly Recurrence Option	No
Create/Manage Reservations	Hide Random Recurrence Option	No
Create/Manage Reservations	Hide Weekly Recurrence Option	No
Create/Manage Reservations	Number of Available Rooms upon Search	500
Create/Manage Reservations	Require Contact Email	No
Create/Manage Reservations	Require Contact Phone	Yes
Create/Manage Reservations	Setup Type Validation Rule	Setup and Validation
Create/Manage Reservations	Show Additional Filters Initially	Yes
Create/Manage Reservations	Show 2nd Contact	Yes
Create/Manage Reservations	Show Attendance on Room Request	Yes
Create/Manage Reservations	Show Feature Filter	No
Create/Manage Reservations	Show Floor Filter	No
Create/Manage Reservations	Show Room Type Filter	No
Create/Manage Reservations	Validation of Building Hours	On Reserved Time
Create/Manage Reservations	Warn User if Room Selected is Not Available for All Dates	Yes
Create/Manage Reservations	Reservation Source for New Reservation	Web
Create/Manage Reservations	Allow Billing Reference Lookup	Yes
Create/Manage Reservations	Show PO Number on Reservation	Yes
Create/Manage Reservations	Allow PO Number Lookup	Yes
Create/Manage Reservations	Show Room Pricing	Yes

Edit | Print | Close

Tip: These settings default to "No."

See Also: Configure Categories

SET BEHAVIOR FOR A BOOKING TEMPLATE

You can set behavior for Billing Reference and PO Number fields for a specific template when you configure the template, which will override settings at the Global level. These settings default to "No."

1. On the EMS menu bar, click Configuration > Everyday Applications > Everyday User Process Templates.

2. The Everyday User Process Templates window opens on the Everyday User Template tab. Select New or select a template and click Edit.

3. From the screen that presents, use the parameters highlighted below to control field behavior.

Area	Description	Source	Value
Create/Manage Reservations	Allow Billing Reference Lookup	Global	Yes
Create/Manage Reservations	Allow PO Number Lookup	Global	Yes
Create/Manage Reservations	Allow Temporary Contacts	Global	Yes
Create/Manage Reservations	Attachments Allowed Extensions	Global	.csv,.doc,.gif,.jpg,.pdf,.ppt,.txt,.xls,.xlsx,.tif
Create/Manage Reservations	Attachments Allowed on Room Request	Global	Yes
Create/Manage Reservations	Billing Reference Validation	Global	Required But Not Validated
Create/Manage Reservations	Default Cancel Reason	Global	(none)
Create/Manage Reservations	Default Pricing Plan	Global	testm
Create/Manage Reservations	Default Room Availability View	Global	Grid
Create/Manage Reservations	Default Value for Attendance	Global	1
Create/Manage Reservations	Exclude Closures From Date Calculations	Global	No
Create/Manage Reservations	Exclude Weekends From Date Calculations	Global	No
Create/Manage Reservations	Hide Daily Recurrence Option	Global	No
Create/Manage Reservations	Hide Monthly Recurrence Option	Global	No
Create/Manage Reservations	Hide Random Recurrence Option	Global	No
Create/Manage Reservations	Hide Weekly Recurrence Option	Global	No
Create/Manage Reservations	Override Default Room Setup/Teardown Times	Global	No
Create/Manage Reservations	PO Number Validation	Global	Required But Not Validated
Create/Manage Reservations	Require Contact Email	Global	No
Create/Manage Reservations	Require Contact Phone	Global	Yes
Create/Manage Reservations	Reservation Comment Type on Checkout	Global	Comment Type Test
Create/Manage Reservations	Reservation Source for New Reservation	Global	Web
Create/Manage Reservations	Setup Time in Minutes For All Rooms	Global	0
Create/Manage Reservations	Setup Type Validation Rule	Global	Setup and Validation
Create/Manage Reservations	Show 2nd Contact	Global	Yes
Create/Manage Reservations	Show Attendance on Room Request	Global	Yes
Create/Manage Reservations	Show Billing Reference on Reservation	Global	Yes
Create/Manage Reservations	Show Feature Filter	Global	No
Create/Manage Reservations	Show Floor Filter	Global	No
Create/Manage Reservations	Show PO Number on Reservation	Global	Yes
Create/Manage Reservations	Show Room Pricing	Global	Yes
Create/Manage Reservations	Show Room Type Filter	Global	No
Create/Manage Reservations	Teardown Time in Minutes For All Rooms	Global	0
Create/Manage Reservations	Warn User if Room Selected is Not Available for All D...	Global	Yes

See Also: Configure Categories

SET BEHAVIOR FOR A CATEGORY

Use this procedure if you only want specific service categories to use Billing Reference and/or PO numbers. Setting behavior for Billing Reference and PO number fields at the category level will apply to any bookings made using that Category (and override settings at the Global or Template level if those are set to "No").

> Important: Before proceeding, make sure that the global and template settings for these fields are set to "No."

1. On the EMS menu bar, click Configuration > Administration > Categories.

2. Click New or select a Category and click Edit.

3. On the screen that appears, select the Everyday User Applications tab, and use the fields highlighted below to set bookings with this template to prompt the user for Billing Reference and/or PO information.

_States - CAT2

Category | Everyday User Applications | Calculations | Provider | Terms And Conditions | States | Audit

Display to Everyday Users: ☑

Expand Groupings: ☐

Use Specific Cutoff Time: ☐ Cutoff Time: Number of Days: 1

Cutoff Hours: 0

Default Quantity: 1

Available At Checkout: ☐

Prompt For Billing Reference: ☐

Prompt For PO Number: ☐

Allow Add On Weekend: ☑

Sequence: 0

Minimum Amount: 0.00

OK Cancel

See Also: Configure Categories

SET BEHAVIOR FOR A SERVICE

1. On the EMS menu bar, click Configuration > Resources. A list of all the categories that are currently configured in your EMS database and for which you can configure resources opens.

Configuration
System Administratio
Facilities
Resources
Billing
Administration
Other
Everyday User Applications
Kiosk
CAT w/States
*break it RNOSO
_st RES
_st RES - no states
_states
_States - CAT
_States - CAT2
_States - RES
_States - RES2
_States - RSO
_test-roman-catering
<script>alert("!")</script>
AD - Av Equipment
AD EQUIP SERVICE ORDER
Aramark
AS VC RSO
AS VC - RES
Awesome Stuff
British Pound Catering
Catering
Chartwell

2. Select the resource for the service category you wish to set Billing Reference and/or PO number field behavior.
3. From the Resources screen that appears, select the category for the service you wish to edit, and click Services. Then create a New service or select and Edit an existing one.

See Also: [Configure Categories]

SET BEHAVIOR FOR A ROOM TO PROMPT USERS FOR A BILLING REFERENCE

Follow the steps below from the Configuration menu to require users to enter a Billing Reference when choosing this room. These settings will override settings at the Global, Template, and Category levels.

Configure Currencies

A currency in EMS is either an abbreviation or symbol that indicates how a room or resources in a category should be charged. For example, the currency for the US dollar could be either USD or $. Because currencies are for informational purposes only and do not affect the pricing or billing of an event, configuration of these items is not required; however, after you configure currencies, you can assign a default value to a room's record or a service category's record. If a reservation is made with multiple currencies, then the billable items, the items' prices, and the currencies used for items' charges are broken out by currency in sales reports, in confirmations, in EMS Web App, and so on.

> Tip: You can also configure multiple currencies in a single step. See Currency Configuration Wizard.

1. On the EMS menu bar, click Configuration > Billing > Currencies. The Currencies window opens. This window lists all the currencies that are currently

configured in your EMS database and that have a status of Active. To show all currencies, regardless of status, under Show, click Inactive.

2. Click New. The Currency dialog box opens.

3. Enter the information for the new currency.

FIELD	DESCRIPTION
Description	The name or description for the currency. Note: The description can be a maximum of 50 characters, including spaces.
Symbol	Required field. The abbreviation or symbol for the currency, for example, USD or $ for US dollars. Tip: To add special characters, copy and paste from a text file.

FIELD	DESCRIPTION
Trailing Symbol	Leave this option blank if the currency symbol is to be displayed in a leading position, for example, $45.00. Select this option if the symbol is to be displayed as the far right hand character.

Note: As you enter the information for the currency, an example currency entry is displayed in the Sample field.

4. Leave Inactive blank to add the currency as an active currency. Select Inactive to inactivate the currency.
5. Click OK. The Currency dialog box closes. You return to the Currencies window with the newly configured currency automatically selected.

Configuration > Administration

Before you can use EMS to manage your organization's events, you must configure core data items that are specific to your organization. For example, before you can add resources (equipment, catering information, and so on) to a booking, you must first configure the categories for these resources.

Configure Categories

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 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 there 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; then flipchart and whiteboard would be typical options to add to the event.

> Tip: The following Category Types allow Production Items: Catering, Resources with Service Orders, and Resources Without Service Orders.

1. On the EMS menu bar, click Configuration > Administration > **Categories**. The Categories window opens, where you can define categories of services you can add to booking templates. This window lists all the Categories and their types that are currently configured in your EMS database and that have a status of Active. To filter all Categories regardless of status, under Show, click **Inactive**.

> **Tip:** You can define a Category here with the Category Type of Attendees to enable users to add attendees to a booking on the EMS Web App Services page. If you define this Category and then add it to a booking template for Everyday Users, then they can control attendees as part of editing Services.

2. Click **New**. The Category dialog box opens on the Category tab.

Category

Category | Everyday User Applications | Buildings | Audit

Category:

Print Sequence: 0

Category Type: Activities

Default Service: (none)

Default Time In Use: Reserved Time

Default Quantity: (none)

Currency: USD

Available To All Buildings: ☐

Allow Resource Notes Edit: ☑

Exclude From Services Indicator: ☐

Use Production Items: ☐

Use States: ☐ Default: (none)

BEO Column: ◉ Column 1 ○ Column 2

External Service: ☐ Provider: (none)

Attendees Are Visitors: ☐

☐ Inactive

OK Cancel

3. Enter the information for the new Category.

FIELD	DESCRIPTION
Category	The name or description for the Category, for example, A/V Equipment or Furniture (maximum of 30 characters, including spaces)
Print Sequence	If items from multiple Categories have been reserved for an event, then the Print Sequence determines the order in which this information is printed on the Confirmation and other reports. Categories are ordered from lowest to highest sequence number, with the Category with the lowest sequence number being displayed first. **Note**: If you leave the print sequence set to the default value of zero for all items, then by default, the items are displayed alphabetically.
Category Type	Typically, the determining factor is how the category is to be used.

FIELD	DESCRIPTION
	» **Activities**–Agenda-type entries that describe what is to occur during an event, for example: 8:30 a.m. - 9:00 a.m., Registration; 9:00 a.m. - 10:00 a.m., Keynote Speaker, and so on. » **Attendees**–Individuals who are attending an event. You can use this category for attendees such as VIPs or guest speakers, or to serve as an attendee checklist for smaller meetings. **Note**: The "Attendee" Category Type does not typically relate to attendees invited to a meeting using the optional Integration to Microsoft Exchange module for EMS Web App or EMS Mobile App or using EMS for Outlook. » **Notes**–A free-form block of text that is used to enter clarifying or miscellaneous information about the event. For example, your users can describe room setup for an event

FIELD	DESCRIPTION
	such as “Set room temp. at 70 degrees one hour prior to event” or “Please unlock doors at 7 a.m.” » **Resources w/o Service Orders**–Resources that are assigned to a booking from this Category Type are assigned for the entire event time. Typically, this Category Type is used to manage Audio/Visual Equipment and Furniture categories. » **Resources w/ Service Orders**–Similar to Resources w/o Service Orders categories with one exception–you must indicate the specific time that the items assigned to a booking are needed. The end result is one or multiple service orders with specific services times before, during or after the event. Typically, this Category Type is used manage staffing for an event. » **Catering**–Used to manage categories specific to food & beverage service. Provides capability similar to the Resources, w/ Service Order category in addition to the catering specific fields of Estimated Count, Guaranteed

FIELD	DESCRIPTION
	Count, and Actual Count. **Tip:** If you choose **Resources w/o Service Orders**, **Resources w/ Service Orders**, or Catering, then the Use Production Items option becomes available.
Default Service	Services are defined at the resource level. (See Configuring Resources for a Category.) After you define your resources and services, then you can edit this category if needed and define a default service.
Default Time in Use	Available only if Catering, Resources w/ Service Orders, or Resources w/o Service Orders is selected as the Category Type. Indicates the time that the items in the selected category should be in use—for the Reserved Time or for the Event Time.

FIELD	DESCRIPTION
Default Quantity	Depending the category that was selected, one or more of the following options are available: • Setup Count • Estimated Count
Currency	Select the currency to be used for pricing all the resources in the category. **Note**: If the appropriate currency is not available, you can configure it. See Configuring Currencies.
Available to All Buildings	Select this option if resources from this category are to be available to all buildings. **Note**: If you do not select this option, then on the Buildings tab, you must specify the buildings for which

FIELD	DESCRIPTION
	resources from this category are to be available.
Allow Resources Notes Edit	If selected, EMS Desktop Client users can edit the Notes field for the resource.
Exclude from Services Indicator	In various EMS locations (the Reservation Book, the Navigator, the Edit Booking form, and so on) EMS provides an indication that services exist for a booking. Select this option to exclude a category from displaying as a service on the booking.
Use Production Items	Select this option to define production items for the category. Production Items are typically used for Catering Category Types where EMS software will be used by a production kitchen.

FIELD	DESCRIPTION
	Note: Production items are defined at the resource level. See Configuring Resources for a Category.
Use States	Select this option if you want to define process phases, or states, for the category, for example, “Assigned,” “Out for Delivery,” “Delivered,” and so on. **Note**: After you define your states, then you can edit this category if needed and specify a default state.
BEO Column	Indicates in which column the category is to be displayed when the Banquet Event Order report is printed in its standard two column format. Select Column 1 to display the category in the left column. Select Column 2 to display the category in the right column.
External	Select this option if the provider of the resources for this

FIELD	DESCRIPTION
Service	category is external to your organization, and then select the provider on the Provider dropdown list. **Note**: Available only for a Category Type of Notes and if the EMS system parameter “Show External Service Orders on Categories” is set to “Yes.” See . **Note**: If the appropriate service provider is not available, contact EMS Support for assistance in configuring the provider.
Attendees are Visitors	Select this option to automatically mark all attendees who are added to a booking as a Visitor. (The Visitor option is automatically selected on the Attendee dialog box.)

4. Open the Everyday Applications tab and enter the appropriate information.

Category

Category | Everyday User Applications | Calculations | Buildings | Provider | Terms And Conditions | Audit

Display to Everyday Users: ☐

Expand Groupings: ☐

Use Specific Cutoff Time: ☐ Cutoff Time: Number of Days: 1

Cutoff Hours: 0

Default Quantity: 1

Available At Checkout: ☐

Prompt For Billing Reference: ☐

Prompt For PO Number: ☐

Allow Add On Weekend: ☑

Sequence: 0

Minimum Amount: 0.00

OK Cancel

Important: Settings on this tab control behavior for Everyday User Applications: EMS Web App. EMS for Outlook, and EMS Mobile App.

FIELD	DESCRIPTION
Display to Everyday Users	If selected, EMS Web App and EMS for Outlook users can view this category if it has been added as a booking detail to one of their bookings.
Expand Groupings	If selected, the resource items for a grouping are displayed immediately when a EMS Web App or EMS for Outlook user makes a reservation. If cleared, only the grouping is displayed and a user must expand the grouping to view the resource items. Typically, this option is selected if an option has a small list of resources within the category.
Use Specific Cutoff Time	Indicates how far in advance of a booking a EMS Web App or EMS for Outlook user can add, edit, or cancel this category. For example, if you select the Cutoff Time/Number of Days option, and you specify 11:00 a.m. and one day, then EMS Web App or EMS for Outlook users can-

FIELD	DESCRIPTION
	not assign, edit, or cancel categories or resources after 11:00 a.m. on the day before the event.
Cutoff Hours	Available only if you do not select the Use Specific Cutoff Time option. With this option, the restriction is imposed based on the number of hours before the event occurs rather than time of day.
Default Quantity	The default quantity (either 1, Attendance, or Blank) that is automatically filled in by the system when a EMS Web App or EMS for Outlook user selects an item.
Available at Check-out	Select this option if this category is to be displayed as part of the initial Room Request process in EMS Web App. If not selected, EMS Web App users must first complete the Room Request process before they can request the category.

FIELD	DESCRIPTION
	Note: For example, if an Attendee type Category is associated with a booking template and this option is selected, then users will be able to add or remove attendees *during* the booking. If it is de-selected, by contrast, they will only be able to manage attendees on the Reservation Details > Services page once the reservation is created and they are in edit mode.
Prompt for Billing Reference	Select this option if EMS Web App users are to be prompted to enter a billing reference and/or PO number when they select a resource from the category.
Prompt for PO Number	Note: Selecting these options does not *require* the user to enter these values, only that they will be prompted to enter values. The behavior of these fields (required, validated, or displayed) is controlled in the Billing Reference Validation and PO Number Validation EMS Web

FIELD	DESCRIPTION
	App system EMS Web App Parameters in EMS Desktop Client. Users will see the Billing Reference field during the booking process when this parameter is set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the Admin decides whether to display the field, user entries will be validated based on the value in the "Billing Reference Validation" parameter set on the template. Billing Reference field options: » Show (Prompt) » Require » Validate (Show and Require)

FIELD	DESCRIPTION
	» Don't Show Additionally, the **Billing Reference Validation** parameter will always determine whether it is optional, required, or required and validated. **See Also:** Configure Field Behavior for Billing Reference and PO Numbers.
Allow Add On Weekend	Select this option to allow a EMS Web App user to add a service order to a Saturday or Sunday booking.
Sequence	Determines the order in which the category is displayed in a list of categories in EMS Web App or EMS for Outlook. Categories are ordered from lowest to highest sequence number, with the category with the lowest

FIELD	DESCRIPTION
	sequence number being displayed first. **Note**: If you leave the sequence set to the default value of zero for all categories, then by default, the categories are displayed alphabetically.
Minimum Amount	The minimum purchase amount that is required for a user to submit a new service order in EMS Web App or EMS for Outlook for this category.
Inactive	Leave this option blank to add the category as an active category. Select this option to inactivate the category.

5. If you did *not* select Available to All Buildings then go to Step 6; otherwise, open the Buildings tab, and on the Available list, select the building, or CTRL-click to select the multiple buildings for which the category is to be available, and then click the Move button (>) to move the selected buildings

to the Selected list.

6. Optionally, do one or more of the following:

» Open the Calculations tab and on the Available list, select the calculation (CTRL-click to select multiple calculations) you always want to apply to this category, and then Move (>) the them to the Selected list. These calculations apply to all new resources that are added to the category. If the appropriate calculations are not available, you can configure them. See Configuring Calculations. You can also define calculations at the resource item level. See Configuring Resources for a Category.

» Open the Provider tab and enter the contact information for the provider of the items or services in the category. Select International to drop the State and Zip fields for an international provider. None of the provider information is displayed or printed anywhere outside of EMS Desktop Client.

» Open the Terms and Conditions tab and format a Terms and Conditions message that must be acknowledged by EMS Web App or EMS for Outlook users when they select the category. Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want; otherwise, you can select HTML and enter the necessary HTML code to format the message.

7. If you did *not* select Use States, continue to the next step; otherwise, open the States tab, and then do the following:

» In the **Description** field, enter a name or description for each state or phase that is to be used for managing this category (maximum of 50 characters, including spaces

» Optionally, to define a color for each state, select the state, and then click **Set Color** to open the Select Color dialog box and select a color for the state.

» After you have defined the states for a category, you can select a default state on the Category tab.

8. Click **OK**. The Category dialog box closes. You return to the Categories window with the newly added category automatically selected. You can now define the resource items for the categories. See Configuring Resources for a Category.

Enable Visitor Management

Visitors, or guest attendees who may not be part of your organization, can be added to your meetings if you enable this feature. Depending on your licensing, you may need to contact your Professional Services representative to add this feature.

To enable visitor management, you will

- Configure a Category for Visitors, which can be associated with booking templates.
- Configure Everyday User Templates to include the Visitors category you created (on the Categories tab). to allow the Visitor category.
- Enable Check-In for specific rooms.
- Authorize users to manage visitors. If you only allow certain types of users to handle visitors, be sure to assign them to the template you configured above using the Assign button. If you wish to allow visitors to check themselves in (for example, using EMS Mobile App, choose the Self Serve Mode on the Process Template tab when configuring the template, and be sure to enable it for Everyday User Applications as needed.

CONFIGURE A CATEGORY FOR VISITORS

1. In the EMS Desktop Client, navigate to Configuration > Administration > Categories.

2. Select the Display to Everyday Users option on the Everyday User Applications tab so that the category is available for those booking templates.

3. Configure Everyday User Templates to include the Visitors category you created (on the Categories tab).

4. Enable Check-In for specific rooms.
5. Authorize users to manage visitors. If you only allow certain types of users to handle visitors, be sure to assign them to the template you configured above using the Assign button. If you wish to allow visitors to check them-selves in (for example, using EMS Mobile App, choose the Self Serve Mode on the Process Template tab when configuring the template, and be sure to enable it for Everyday User Applications as needed.

Visitor-Enabled Meeting
Process Template
Booking Rules
Defaults
Rooms
Outlook Conflict - Email Options
Categories
Event Types
LDAP Groups
User Defined Fields
Description:
Visitor-Enabled Meeting
Mode:
Self Serve
Menu Text:
Available To New Users:
Reserve Status:
Request Status:
Conflict Status:
Cancel Status:
Rule Violation Status:
Default Setup Type:
(none)
Menu Sequence:
0
Video Conference:
Everyday User Application Settings
Enable for Web App:
Enable for Mobile:
Enable for Outlook:
Enable Integration to Microsoft Exchange:
Inactive
OK
Cancel

Configure Departments

> Tip: You Only Need to Define Departments Responsible for Hosting or Servicing Events in EMS.

This element is only used to link an event with a Department that either hosts or services a meeting (so they can send notifications & confirmations, track billing, and initiate invoices), so you do not need to define departments in EMS other than these. Typically, these are departments that absorb the cost of hosting events, and departments like A/V or Catering that provide services. All financial transactions in EMS are batched by department. Groups and customers make payments to one or more departments for the events they schedule at your organization's facilities

As the EMS administrator, you configure departments for your organization so they can notify attendees and send invoices linked to billing and PO numbers.

1. On the EMS menu bar, click Configuration > Administration > Departments. The Departments window opens. The window displays all departments that are currently configured in your EMS database and that have a status of Active. To view all departments in your EMS database, regardless of status, under Show, click Inactive.

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

3. Enter the information for the new department.

FIELD	DESCRIPTION
Department	The name of the department. Note: The department can be a maximum of 50 characters, including spaces.
Address, City ST Zip	The address for the department.

FIELD	DESCRIPTION
Country	The country for the department.
Phone Fax	The phone and fax number for the department.
International	Select this option to drop the State and Zip fields for an international department.
Note: The name, address, phone, and fax that you define here are printed at the top of confirmations and invoices.	
Email Address	The email address for the department.
Notes	Any descriptive or clarifying information that is pertinent for the department.

FIELD	DESCRIPTION
Invoice Prefix Invoice Suffix	Not required for the first department that you configure. Required if multiple departments have been configured. This information clarifies which department generated an invoice.
Next Invoice No.	Required field. The value must be a number between 1 and 999999. The invoice number entered here is the number of the first invoice that is generated by a user in the department. This number is automatically incremented by one each time a user in the department generates an invoice.
Transaction Lock Days	The number of days after a transaction is generated that it can still be modified. For example, if the field is set to 30, an invoice generated by this department can be voided only within 30 days of its creation.

FIELD	DESCRIPTION
Inactive	Leave this option blank to add the department as an active department. Select this option to inactivate the department.

4. Optionally, do one or more of the following:

» Open the Logo tab and do the following:

» In the Description field, enter a name or description for the logo that is to be printed on the confirmations and invoices generated by the department (maximum of 50 characters, including spaces

» Click Browse to browse to open the Find Logo dialog box, and then browse to and select the logo.

» The logo must be one of the following file types–.gif, .jpg, .jpeg, .bmp, .wmf, and .png. By default, the logo is printed at the top left of confirmations and invoices. You can select Align Right to align the logo at the top right instead of the top left.

» Open the Confirmation Header Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to be included in the header of every confirmation that is generated by the department.

- Open the Invoice Header Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to be included in the header of every invoice that is generated by the department.
- Click Spelling to spell check the information that you entered before you save it.

5. Click OK. The Department dialog box closes. You return to the Departments window with the newly configured department automatically selected.

Configure Statuses

A status automates the booking workflow, especially for booking requests that must be approved and then completed. A status is one of four core data items that you must configure so that your users can make reservations.

> Tip: You can associate a status to reservations and to bookings, but only booking-level statuses affects room availability. Every booking must have a status.

You may wish to configure your own statuses to automate the booking request workflow, such as “Confirmed,” “Tentative,” “Wait List,” and “Canceled.” You can configure as many statuses as you need and give them any names you want; however, you must always assign one of the four following status types to a status:

- Book Space
- Wait

- Info Only
- Cancel

> Important: Status type determines if a room remains available to other users.

The name that you assign to a status is a convenient label that assists you in managing your organization's business. The status type is what is actually used by EMS to determine if a room must be taken out of inventory.

TO CONFIGURE STATUSES

1. On the EMS menu bar, click Configuration > Administration > Statuses. The Statuses window opens. This window lists all the statuses that are currently configured in your EMS database and that have a status of Active.

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

2. Click New. The Status dialog box opens.

3. Enter the information for the new status.

FIELD	DESCRIPTION
Status	The name of the status.

FIELD	DESCRIPTION
	Note: The status can be a maximum of 30 characters, including spaces.
Status Type	Required. You must select one of the following four values: » Book Space—The room is taken out of inventory and cannot be reserved by another booking. (The system prevents the space from being double-booked.) » Cancel—Booking information is retained, but the room is released back into inventory. » Info Only—Booking information is retained, but the space is not taken out of inventory. » Wait—Booking information is retained in case the space becomes available prior to the event date. Wait bookings show up on the Wait List Report and in the Dashboard.

FIELD	DESCRIPTION
	Note: If you are configuring a conflict status, then it must Status Type Info Only or Wait.
Reserved Color	The color that is used by this status in the Reservation Book to indicate reserved time. When the reserved time extends before or after event time, thin bars of this color extend out from the beginning and/or end of the event. To use the system default colors, click Default.
Event Color	The color for events of this status in the Navigator and Reservation Book. To use the system default colors, click Default. Note: Lighter colors are the better colors to use for events because they make it easier to read the event name in the Reservation Book, which is in black text.

FIELD	DESCRIPTION
Reconfirm Date	Select this option if you want the system to require a reconfirm date when a reservation is made in EMS. When a user gives a booking a status that requires a reconfirm date, the system displays an additional field, prompting the user to enter the date. You can identify bookings with a reconfirm date in the Dashboard.
Commits Inventory	Select this option if the status should remove resources from inventory. Note: Typically, you would select this option for a status with a Book Space type whereas you would not select this option for a status with a Cancel type.
Inactive	Leave this option blank to add the status as an active status. Select this option to inactivate the status.

FIELD	DESCRIPTION
EMS Web App Settings	
Display to Everyday Users	Select this option to display the event details for bookings with this status in EMS Web App.
Allow Booking Edit	Select this option to allow the editing of bookings with this status in EMS Web App.
Allow Service Edit	Select this option to allow the editing of services for bookings with this status in EMS Web App.
Allow Booking Cancellation	Select this option to allow the canceling of bookings with this status in EMS Web App.

4. Click OK. The Status dialog box closes. You return to the Statuses window with the newly configured status automatically selected.

Configure Notification Rules

Notification Rules determine which EMS users are emailed about additions or changes are made in EMS. You can set these rules to trigger for new or changed bookings or service orders, changes to VIP events, new Everyday User accounts, or when specific UDF options are selected. Triggers are based on rooms, statuses, event types, group types, setup types, and/or categories.

For a Notification to be generated, all the criteria in the rule must be met. Typically, notifications are an internal function for reservation schedulers and service providers, but when you are configuring a Notification Rule, you can specify the email address for whomever you wish to receive an Email Notification.

This topic contains information on the following:

- To Configure a Notification Rule
- Booking Notification Rules
- Service Order Notification Rules

- Notification Rules for Anything On A VIP Event
- New Everyday Users Notification Rules
- User Defined Field Notification Rules
- Select Users to Notify
- Selecting Rooms Requiring Notifications
- Select Booking Statuses Requiring Notifications
- Select Event Types Requiring Notifications
- Copy a Notification Rule

> Note: The EMS Email Notification Service must be installed and configured for Email Notifications to be sent. See the Email Notification Service Install Instructions for details.

The timing of notification emails also depends on settings in the following three EMS system parameters (See System Parameters):

- Exclude Building Closures on Notifications
- Exclude Weekends on Notifications
- Ignore Building Closure/Weekend Notification Settings Beyond xx Days

Concept: Why Set Notification Rules?

EMS enables you to set detailed rules that trigger when notifications are sent to people and groups. This highly customizable feature guides you through a series of screens where you fine-tune your notification rules so that notices are more meaningful and timely, and so that notices automatically go to the right people at the right time. You can set your rules to trigger notifications for specific people, rooms, event statuses, and event types. Take extra time with this step and revisit your rules regularly to make sure they are continuing to serve your needs.

TO CONFIGURE A NOTIFICATION RULE

1. On the EMS menu bar, click Configuration > Administration > Notification Rules. The Rules window opens, listing all active Notification Rules configured in your implementation. To view any de-activated Rules, select Inactive in the Show section.

2. Click New. The Notification Rule Wizard opens.

3. In the Description field, enter a name or description for the new Notification.
4. Leave the Inactive box unchecked to add the Notification Rule as an active Rule.
5. Select the Notification Type; these are defined below and your selection in this field changes additional fields that become available.

BOOKING NOTIFICATION RULES

Any of the following notification types are considered booking notifications, and are available when creating new Notification Rules in the wizard:

- New Bookings
- Changes to Date/Time
- Room Changes
- Status Changes

Notification Rule Wizard

Description:

Inactive

Notification Type

Bookings

Service Orders

Anything On A VIP Event

New Everyday Users

User Defined Field

New Bookings

Changes To Date/Time

Room Changes

Status Changes

Setup Type: (all)

Notification triggers if change occurs within 7 Days of Booking Date

Source

Desktop Client

Everyday User Application

Display New Bookings As

Booking Information

Reservation Information

Summary Email Audit

Summary:

1. The Setup Type field in the Notification Rule Wizard enables you to ensure that changes to a booking's room setup will appropriately notify attendees. (See this section for configuring Setup Types). You can select one of the existing setup types, or one of the options below.

- (all) - The rule will trigger on all Setup Types.
- (any other than Room default) - Notifications will trigger for all Setup Types except for the Room's default Setup Type. (To change the default Setup Type you can go to Configuration > Facilities > Rooms, then select a Room and press "Edit"; then make your changes in the "Default Setup Type" field.)

2. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.
3. The Display New Booking As field enables you to specify whether the Notification occurs as Booking Information or Reservation Information. For example, for new reservations that contain multiple bookings (recurring meetings), if Booking Information is selected, then a Notification occurs for every individual booking. If Reservation Information is selected, then a single Notification occurs for the entire reservation.
4. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

> Note: The Booking options described here only apply to EMS Enterprise. In EMS Professional, only one global Booking Notification can be configured at any time in your EMS database and it is only available if a Booking Notification is not currently configured in your EMS database.

SERVICE ORDER NOTIFICATION RULES

Any of the following notification types are considered service order notifications:

- New Service Orders
- Changes to Service Orders
- Deleted/Canceled Service Orders

1. On the Category dropdown list, select the category for which the service order Notification is to be generated. If the appropriate category is not available, you can configure it. See Configure Categories.
   After selecting a category, the State, Grouping,

and Resource options appear. You can select (all), (multiple), (none), or an individual item on the list. To notify on a whole category, keep the selections set to (all).

- State–Select the corresponding state that you the Notification to trigger on. "New Service Orders" will have to start in that state. "Changes To Service Orders" will have to change into that state. More than one state may be selected.
- Grouping–Select the grouping that a resource is in. These are set at the resource level in EMS. See Configuring Groupings for a Resource.
- Resource–Select an individual resource from the list.

> Note: When you choose a Group or Category, all three items (New Service Orders, Changes To Service Orders, and Deletion/Cancelation Of Service Orders) will become auto-selected. The notification will now only fire on all three. To set the rule to trigger notifications on only one or two of these three, you must select (all) on both Group and Category.

2. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when

notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.

3. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

NOTIFICATION RULES FOR ANYTHING ON A VIP EVENT

VIP Event is an option available when creating a reservation in the Reservation Wizard. Select this option to notify users when any changes are made to a VIP Event.

NEW EVERYDAY USERS NOTIFICATION RULES

Select this option to notify users when a new Everyday User account is created. For Source, indicate whether additions and/or changes from the EMS Desktop Client, EMS Web App, or both should trigger a Notification.

USER DEFINED FIELD NOTIFICATION RULES

1. In Type field, select the User Defined Field type for which the Notification is to be generated. If the appropriate UDF is not available, you can configure it. See Configuring User Defined Fields (UDFs).
2. Select the UDF for which the Notification is to be generated. (Available UDFs have a field type of List. UDFs with other field types are not displayed on the User Defined Field dropdown list.)
3. Select the UDF value for which the Notification is to be generated.
4. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.
5. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

Note: The Service Order options described here only apply to EMS Enterprise. In EMS Professional, only one service order Notification per category can be configured at any time in your EMS database.

SELECT USERS TO NOTIFY

6. Click Next. The Users window opens.

7. Select users and email addresses to which to send notifications:

8. On the Available list, select the EMS user, or CTRL-click to select the multiple users who are to receive the email Notification, and then click the move button (>) to move the selected users to the Selected list. If the appropriate user is not available, you can configure it. See Configuring User Accounts.

9. In the Email Address field, for each user and/or group that is to receive the email Notification, enter the appropriate email address, and then click Add.

   OR

   Leave the Email Address field blank, and then click Add to open the Select Names dialog box in which you can search for and add the necessary email addresses from your Groups/Contacts lists, your Global Address List, or your Outlook address book.
10. The following additional options are available on this screen:

- Group Users Tied To Rule - This Rule controls how users are notified as a group. If a user is designated on the Rule as recipient and this option is selected, then no notifications will fire. If, however, this option is not selected and that user triggers it, the notifications will go to all the other users and email recipients designated as recipients on the Rule.
- Send to Event Coordinator - Send notifications to the Reservation Event Coordinator's email address or dashboard when checked.
- Send To Everyday User - Send notifications to the Everyday User's email address when checked.
- Send to Reservation Group/Contacts - Send notifications to the first contact's email address, or the group's email address.

SELECTING ROOMS REQUIRING NOTIFICATIONS

1. If you have not selected New Everyday Users, click Next. The Rooms window opens.

2. Search for the rooms to which the Notification applies:

» For Building, select one of the following–(all) buildings, a specific building, a specific area, or a specific view.

» For Room Type, leave the default value of (all), or select a specific room type.

> Tip: To search for active and inactive rooms, select Show Inactive.

If the appropriate building, area, room type, or view is not available, you can configure it. See Configuring Buildings, Configure Areas, Configure Room Types, and/or Configure Public Views.

3. On the Available list, select a room, or CTRL-click to select multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list.
4. Click Next. The Statuses window opens.

SELECT BOOKING STATUSES REQUIRING NOTIFICATIONS

1. Click Next. The Statuses window opens, where you can specify the status of an event that should trigger a notification.

2. Move (>) booking statuses (use CTRL-click to select multiple statuses) that should trigger a notification from the Available list to the Selected list. If the appropriate status is not listed, you can configure it. See Configure Statuses.

SELECT EVENT TYPES REQUIRING NOTIFICATIONS

1. Click Next. The Event Types window opens, where you can specify the type of event that should trigger a notification.

2. Move (>) event types (use CTRL-click to select multiple statuses) that should trigger a notification from the Available list to the Selected list. If the appropriate event type is not listed, you can configure it. See Configuring Event Types.

3. Click Finish. The Notification Rule Wizard closes. You return to the Rules window with the newly configured Notification Rule automatically selected.

COPY A NOTIFICATION RULE

Notification Rules can be configured by making a copy of an existing Rule.

1. On the Notification Rules screen click the Copy button. The Rule will be completely the same as the previous one, except for the Description having "Copy of " added to the beginning of the name.

Types of Notification Rules

This topic details the types of Notification Rules in EMS:

- Booking Notification Rules
- Service Order Notification Rules
- Notification Rules for Anything On A VIP Event
- New Everyday Users Notification Rules
- User Defined Field Notification Rules

BOOKING NOTIFICATION RULES

Any of the following notification types are considered booking notifications, and are available when creating new Notification Rules in the wizard:

- New Bookings
- Changes to Date/Time
- Room Changes
- Status Changes

1. The Setup Type field in the Notification Rule Wizard enables you to ensure that changes to a booking's room setup will appropriately notify attendees. You can select one of the existing setup types, or one of the options below.

» (all) - The rule will trigger on all Setup Types.

» (any other than Room default) - Notifications will trigger for all Setup Types except for the Room's default Setup Type. (To change the default Setup Type you can go to Configuration > Facilities > Rooms, then select a Room and click Edit; then make your changes in the "Default Setup Type" field.)

3. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.
4. The Display New Booking As field enables you to specify whether the Notification occurs as Booking Information or Reservation Information. For example, for new reservations that contain multiple bookings (recurring meetings), if Booking Information is selected, then a Notification occurs for every individual booking. If Reservation Information is selected, then a single Notification occurs for the entire reservation.

5. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

> Note: The Booking options described here only apply to EMS Enterprise. In EMS Professional, only one global Booking Notification can be configured at any time in your EMS database and it is only available if a Booking Notification is not currently configured in your EMS database.

SERVICE ORDER NOTIFICATION RULES

Any of the following notification types are considered service order notifications:

- New Service Orders
- Changes to Service Orders
- Deleted/Canceled Service Orders

1. On the Category dropdown list, select the category for which the service order Notification is to be generated. If the appropriate category is not

available, you can configure it. See Configuring Categories.

2. After selecting a category, the State, Grouping, and Resource options appear. You can select (all), (multiple), (none), or an individual item on the list. To notify on a whole category, keep the selections set to (all).

- State–Select the corresponding state that you the Notification to trigger on. "New Service Orders" will have to start in that state. "Changes To Service Orders" will have to change into that state. More than one state may be selected.
- Grouping–Select the grouping that a resource is in. These are set at the resource level in EMS. See Configuring Groupings.
- Resource–Select an individual resource from the list.

> Note: When you choose a Group or Category, all three items (New Service Orders, Changes To Service Orders, and Deletion/Cancelation Of Service Orders) will become auto-selected. The notification will now only fire on all three. To set the rule to trigger notifications on only one or two of these three, you must select (all) on both Group and Category.

3. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.
4. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

NOTIFICATION RULES FOR ANYTHING ON A VIP EVENT

VIP Event is an option available when creating a reservation in the Reservation Wizard. Select this option to notify users when any changes are made to a VIP Event.

NEW EVERYDAY USERS NOTIFICATION RULES

Select this option to notify users when a new everyday user account is created. For Source, indicate whether additions and/or changes from the EMS Desktop Client, EMS Web App, or both should trigger a Notification.

USER DEFINED FIELD NOTIFICATION RULES

1. In Type field, select the User Defined Field type for which the Notification is to be generated. If the appropriate UDF is not available, you can configure it. See Configuring User Defined Fields (UDFs).
2. Select the UDF for which the Notification is to be generated. (Available UDFs have a field type of List. UDFs with other field types are not displayed on the User Defined Field dropdown list.)
3. Select the UDF value for which the Notification is to be generated.
4. Next to the Notification triggers if change occurs within... field, you can specify the timeframe (in days or hours) leading up to the booking when notifications generate. Enter a number and select "Days" or "Hours" from the dropdown.
5. For Source, indicate whether additions and/or changes in the EMS Desktop Client, EMS Web App, or both will trigger a Notification.

Note: The Service Order options described here only apply to EMS Enterprise. In EMS Professional, only one service order Notification per category can be configured at any time in your EMS database.

Configure Group Notification Rules

Group notification rules determine the conditions under which groups that are holding events at your facility are reminded through an email notification about their events. You configure group notifications based on rooms, statuses, event types, group types, and/or categories. A group notification is generated only if all the criteria that you specified is met. For example, if you specify Room 100, Confirmed status with catering, then a Confirmed meeting in Room 100 without a catering service order does not result in a notification being generated. Group notification emails contain a summary of the group's events. For example, if a group has a weekly Friday meeting (a booking) that continues for several months, and you define a group notification rule with a monthly frequency, then the group receives a notification email once a month that lists all the Friday meetings for the month.

> Note: Configuring Group Notification Rules is similar to configuring notification rules for individuals. If you are familiar with this process, you can apply the same rules for groups.

You can configure multiple group notifications in EMS Enterprise. You can configure only a single group notification in EMS Professional. For notification emails to be sent, the EMS Email Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

This section contains information on the following:

- Configure a Group Notification
- Set the Confirmation Rules for a Group Notification Email

CONFIGURE A GROUP NOTIFICATION

1. On the EMS menu bar, click Configuration > Administration > Group Notification Rules. The Group Notification Rules window opens. This window

lists all the group notification rules that are currently configured in your EMS database and that have a status of Active.

> Tips: Optionally, to view all group email notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a group email notification rule “from scratch.” You can also configure a group email notification rule by copying an existing rule. Select the notification rule that you want to copy, click Copy, and then go to Step 3.

2. Click New. The Group Notification Rule dialog box opens. The Group Notification Rule tab is the active tab.

3. Enter the information for the new group notification rule.

OPTION	DESCRIPTION
Description	The name or description for the group notification rule. Note: The description can be a maximum of 50 characters, including spaces.
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every notification that is sent to the group. Note: If the appropriate message is not available, you can configure it. See Configuring Messages.
Email Format	Select the format (HTML or Plain Text) for the email.
Frequency	Select the frequency with which the notification is to

OPTION	DESCRIPTION
	be sent. • Daily—You must indicate how many days prior to/after the Booking Date/Last Booking Date that the notification is to be sent. • Weekly—You must select the day on which the notification is to be sent and for which bookings. (For example, every Friday for bookings that start on the following Monday). • Monthly—You must indicate how many days prior to the end of the month that the notification is to be sent.
Multiple Bookings Only	Available only in EMS Workplace. Select this option to notify users if they have multiple bookings on a

OPTION	DESCRIPTION
	particular day.
Send Confirmation	Select this option to attach a full detailed confirmation to the group email; otherwise, leave this option blank to have the group email contain only a simple listing of bookings. Note: The contents of the full confirmation email are determined by the confirmation settings that you specify.
Email Notification At/Time Zone	Select the time of day (based on the time zone) at which the email notification is to be sent.
Include Cancel Link	Available only if Send Confirmation is not selected. Provides a link in the notification email so that a user

OPTION	DESCRIPTION
	can cancel the booking directly from the notification email.
Include Reconfirm Link/Reconfirm Status	Available only if Send Confirmation is not selected. Provides a link in the notification email so that a user can reconfirm the booking directly from the notification email. If you select this option, then you must also select a Reconfirm Status that is to be applied to the booking. Note: If the appropriate status is not available, you can configure it. See Configuring Statuses.
Email Group Email 1st Contact	Select the appropriate options to indicate to whom the group notification is to be sent. Note: If the appropriate group, contact, and/or web

OPTION	DESCRIPTION
Email 2nd Contact Email Web User	user is not available, you can configure it. See Configure Groups, Configure Contacts, and/or Configure Everyday Users.
Email From	Enter the email address that is to be displayed in the Email From field for the group notification. Note: If you leave the Email From field blank, then the Email From address that was defined during the installation and configuration of the EMS Email Notification Service is used.
Email Subject Line	Enter the text that is to be displayed in the email subject line. Variables pull in selected data from the event for which the notification is being emailed. You

OPTION	DESCRIPTION
	can include variables as described in the Legend. For example,%2% is the code for the group name, so “Notification for %2%” would result in “Notification for Consumer Electronics Association” being displayed in the subject line. By default, email notifications for booking-level notifications also display the actual booking date (and not just the first booking date of the reservation) in the subject line of the email.
Inactive	Leave this option blank to add a group email notification rule as an active rule. Select this option to Inactivate the group notification rule.

4. Do one or more or all the following to set the criteria that triggers the generation of the notification:

- Open the Rooms tab, you can search for the rooms by Building and Room Type. On the Available list, select rooms, (CTRL-click to select multiple rooms), and then Move them (>) to the Selected list.
- Open the Statuses tab, and specify statuses that should trigger notifications.
- Open the Event Types tab, and specify event types that should trigger notifications.
- Open the Group Types tab, and specify group types that should trigger notifications.
- Open the Categories tab, and specify categories that should trigger notifications.

5. Click OK. The Group Notification Rule dialog box closes. You return to the Group Notification Rules window with the newly configured notification rule automatically selected.
6. If you selected Send Confirmation for the notification rule, then continue to the next section.

SET THE CONFIRMATION RULES FOR A GROUP NOTIFICATION EMAIL

1. If you have not already done so, on the EMS menu bar, click Configuration > Administration > Group Notification Rules to open the Group Notification Rules window.
2. Select the rule for which you are specifying the confirmation settings, and then click Confirmation. The Confirmation Settings dialog box opens. The Date Range tab is the active tab.

3. Specify the settings for the confirmation. At a minimum, you must specify buildings and statuses. All other information is optional.

- Date Range tab–The department name that appears at the top of a printed confirmation.
- Buildings tab–Select the specific buildings, areas, and/or views that are to be included in the confirmation. Note: If the appropriate building, area, and/or views is not available, you can configure it. See Configuring Buildings, Configure Areas, and/or Configure Public Views.
- Categories tab–Select the specific booking details that are to be included in the confirmation.

  Note: If the appropriate category is not available, you can configure it. See Configure Categories.
- Statuses tab–Select the specific statuses that are to be included in the confirmation.

  Note: If the appropriate status is not available, you can configure it. See Configure Statuses.
- Options tab–Format settings for a printed confirmation. See the following table for option descriptions.

FIELD	DESCRIPTION
Confirmation Title	Appears bold and centered at the top of the

FIELD	DESCRIPTION
	confirmation.
Header Message Footer Message	Pre-configured blocks of text that appear in the header and footer of the confirmation. Note: If the appropriate message is not available, you can configure it.
Paper Size	The size of the paper on which the confirmation is printed. Values are Letter, Legal, and A4.
Print Comments	Include the reservation's comments in the printed confirmation.
Print Reminders	Include the reservation's reminders in the printed confirmation.

FIELD	DESCRIPTION
Print Cancel Reasons	Include reasons for cancellation in the printed confirmation.
Print User Defined Fields	Include user defined fields and their values in the printed confirmation.
Suppress Reserved Time	Hide the reserved time for the booking and show only the event time.
Suppress Location	Hide the location for the reservation.
Suppress Pricing	Do not show the reservation's room charges or resource charges in the printed confirmation.
Suppress Logo	Do not show your organization's logo in the printed confirmation.

FIELD	DESCRIPTION
Suppress Item Notes	Do not show resource notes for any booking items in the printed confirmation.
Suppress Item Special Instructions	Do not show special instructions for any booking items in the printed confirmation.
Limit Bookings to Those With Details in Selected Categories	Show only those bookings in the printed confirmation that contain details for the categories that are selected on the Categories tab.

EMS Web App Options Tab—Select your settings for EMS Web App. See the following table for option descriptions.

FIELD	DESCRIPTION
Display Web	Select this option to include a link (URL) to the reser-

FIELD	DESCRIPTION
App Link	vation in EMS Web App.
Web App Link Message	The message that is to be included with the link.

> Note: At a minimum, you must specify buildings and statuses. All other information is optional.

4. Click OK. The Confirmation Settings dialog box closes. You return to the Group Notification Rules window with the notification rule still selected.

Configure Check-in Notification Rules (Excludes Professional)

Check-in Notification Rules help you automate the process of reminding users to check in and managing no-shows. You configure Check-in Notification rules based on rooms, statuses, event types, and/or group types. When you configure a Check-in Notification rule, you can configure it generate an email to remind users to check in and to cancel no-showed events. To do this for group bookings, all the criteria you specify with these rules must be met. For example, if you specify "Room 100, Confirmed status, Analyst group type," then a Confirmed meeting for a Partner group type in Room 100 does not result in a notification being generated.

> Note: For notification emails to be sent, the EMS Check-in Notification Service must be installed and configured. Refer to the EMS Installation instructions for details.

1. On the menu bar, click Configuration > Administration > Check-in Notification Rules. The Check-in Notification Rules window opens. This window lists all the Check-in notification rules that are currently configured in your EMS database and that have a status of Active.

Tips: You can view all Check-in notification rules in your EMS database, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a Check-in notification rule “from scratch.” You can also configure a Check-in notification rule by copying an existing rule. Select the notification rule that you want to copy, click Copy, and then go to Step 3.

2. Click New. The Check-in Notification Rule dialog box opens. The Check-in Notification Rule tab is the active tab.

3. Enter the information for the new Check-in Notification rule.

OPTION	DESCRIPTION
Description	The name or the description for the notification rule. Note: The description can be a maximum of 50 char-

OPTION	DESCRIPTION
	acters, including spaces.
Apply Rule	When to apply the rule; this determines when the Check-in notification rule will be applied and trigger. This can be either before or after the Booking Event Start Time.
Change Status	Select this option if the group's bookings are to be changed to the status selected on the No Show Status dropdown list. Note: If the appropriate status is not available, you can configure it. See "Configuring Statuses".
No Show Status	The status to which the group's bookings are changed if the group "no-shows" (do not check in within the allotted time).

OPTION	DESCRIPTION
Cancel Reason	Optional; available only if the No Show Status is a Cancel Status type. Select a reason for canceling the “no-show” group. Note: If the appropriate cancel reason is not available, you can configure it. See “Configuring Cancel Reasons”.
Send Email	If this box is checked it will send a notification email to the selected party/parties (Group, 1st Contact, 2nd Contact, Web User).
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every Check-in notification that is sent. Note: If the appropriate message is not available, you can configure it. See “Configuring Messages”.
Include Vir-	Includes a link to the reservation summary in Virtual

OPTION	DESCRIPTION
tual Link	EMS.
Include Cancel Link Include Check In Link	Available only if Change Status is not selected. Provides links in the notification email so that a user can cancel or check into the booking directly from the notification email.
Email Group Email 1st Contact Email 2nd	Select the appropriate options to indicate to whom the Check-in notification is to be sent. Note: If the appropriate group, contact, and/or web user is not available, you can configure it. See Configure Groups, Configure Contacts, and/or Configure Everyday Users.

OPTION	DESCRIPTION
Contact Email Web User	
Email From	Enter the email address that is to be displayed in the Email From field for the group notification. Note: If you leave the Email From field blank, then the Email From address that was defined during the installation and configuration of the EMS Email Notification Service is used.
Email Subject Line	Enter the text that is to be displayed in the email subject line. Variables pull in selected data from the event for which the notification is being emailed. You can include variables as described in the Legend. For

OPTION	DESCRIPTION
	example,%2% is the code for the group name, so “Notification for %3%” would result in “Notification for Consumer Electronics Association” being displayed in the subject line if "Consumer Electronics Association" was the name of the event.

4. Do one or more or all the following to set the criteria to trigger a notification:

» Open the Rooms tab and do the following to search for the rooms for which the notification is to apply:

» On the Building dropdown list, select one of the following–(all) buildings, a specific building, a specific area, or a specific view.

> Tip: If the appropriate group, contact, and/or web user is not available, you can configure it. See Configure Groups, Configure Contacts, and/or Configure Everyday Users.

- On the Room Type dropdown list, leave the default value of (all), or select a specific room type.
- On the Available list, select the room, or CTRL-click to select multiple rooms, and then click the Move button (>) to move the selected rooms to the Selected list. If the appropriate room type is not available, you can configure it.
  See Configure Room Types.
- Open the Statuses tab, and on the Available list, select the status, or CTRL-click to select the multiple statuses, and then click the Move button (>) to move the selected statuses to the Selected list. If the appropriate status type is not available, you can configure it.
  See Configure Room Types.
- Open the Event Types tab, and on the Available list, select the event type, or CTRL-click to select the multiple event types, and then click the Move button (>) to move the selected event types to the Selected list. If the appropriate event type is not available, you can configure it.
  See Configure Room Types.
- Open the Group Types tab, and on the Available list, select the group type, or CTRL-click to select multiple group types, and then click the Move button (>) to move the selected group types to the Selected list. If the appropriate group type is not available, you can configure it.
  See Configure Room Types.

5. Click OK. The Check-in Notification Rule dialog box closes. You return to the Check-in Notification Rules window with the newly configured notification rule automatically selected.

Configure Room Card Formats

A room card format is a user-configured layout that can be selected in lieu of the default By Date formats (By Date or By Date [Landscape]) when printing the Room Cards report.

1. On the EMS menu bar, click Configuration > Administration > Room Card Formats. The Room Card Formats window opens. This window lists all the Room Card formats that are currently configured in your EMS database. The two default By Date formats are displayed as a single entry (By Date Formats [Standard]).

2. Click New. The Room Card Format dialog box opens.

3. Enter the information for the new room card format.

Room Card Format Fields

FIELD	DESCRIPTION
Description	The name or description for the room card format. Note: The description can be a maximum of 30 characters, including spaces.

FIELD	DESCRIPTION
Print Landscape	Select this option if the Room Card report is to be printed in a landscape orientation; otherwise, the report is printed in a portrait orientation.
Header	» Top Margin (inches)–Specify a top margin for the report in inches. » Show Room–If the name of the event room is to be printed on the report, select this option, and then on the Font dropdown list, select the font in which the name is to be printed. » Show Date–If the date of the event is to be printed on the report, select this option, and then on the Font dropdown list, select the font in which the date is to be printed.
Fields	» Top Margin (inches)–Specify the top margin in inches between the room and/or date field and the first field in the report. » First Field/Second Field/Third Field–Specify the fields

FIELD	DESCRIPTION
	that are to be displayed on the report as well as the font in which the fields are to be displayed.

4. Click OK. The Room Card Format dialog box closes. You return to the Room Card Formats window with the newly configured room card format automatically selected.

Configure Calendar Formats

You can configure calendar formats, which determine the data items that are printed for an event on the Event Calendar report, for example, Group, Event Time, and Event Location.

1. On the EMS menu bar, click Configuration > Administration > Calendar Formats. The Calendar Formats window opens. This window lists all the calendar formats that are currently configured in your EMS database.

Calendar Formats Window

2. Click New. The Calendar Format dialog box opens. The Calendar Format tab is the active tab.

Calendar Format Tab

3. In the Description field, enter a name or description for the new calendar format.

> Tip: The description can be a maximum of 30 characters, including spaces

4. Optionally, to filter events so that the information for only those events that meet one or more filter criteria are printed on the Event Calendar report, select Set Filter to open four additional tabs–Building, Statuses, Event Types, and Group Types–and then do the following:

Calendar Format Tab with Set Filter Selected

» Open the Buildings tab, and on the Available list, select the building, area or view, or CTRL-click to select multiple buildings, areas, and/or views, and then click the Move button (>) to move the selected statuses to the Selected list.

> Tip: If the appropriate building, area, and/or view is not available, you can configure it. See Configuring Buildings, Configuring Areas, and/or Configuring Public Views.

» Open the Statuses tab, and on the Available list, select the status, or CTRL-click to select multiple statuses, and then click the Move button (>) to move the selected statuses to the Selected list.

> Tip: If the appropriate status is not available, you can configure it. See Configuring Statuses.

» Open the Event Types tab, and on the Available list, select the event type, or CTRL-click to select multiple event types, and then click the Move button (>) to move the selected event types to the Selected list.

> Tip: If the appropriate event type is not available, you can configure it. See Configuring Event Types.

» Open the Group Types tab, and on the Available list, select the group type, or CTRL-click to select multiple group types, and then click the Move button (>) to move the selected group types to the Selected list.

> Tip: If the appropriate group type is not available, you can configure it. See Configuring Group Types.

5. Open the Fields tab, and on the Available list, select the field, or CTRL-click to select the multiple fields that are to make up the calendar format, and then click the Move button (>) to move the selected fields to the Selected list.

> Tip: The information is printed in the order in which the fields are listed from top to bottom in the Selected list. If needed, select a field and change its order by clicking Move Up or Move Down.

6. Click OK. The Calendar Format dialog box closes. You return to the Calendar Formats window, with the newly configured calendar format automatically selected.

Configure Reservation Wizard Templates

The reservation wizard templates simplify the reservation making process for your users. A reservation wizard template sets the default values for many of the fields in the Reservation Wizard. For example, you could configure a video conference reservation wizard template such that the default values for status, room type, event name, and event type are all set to “Video Conference.”

> Note: Your users can always over-write the default values you set here when they use the Reservation Wizard.

This topic includes information on the following:

- To Configure the Reservation Wizard Template
- Set Default Event Information for a Reservation Wizard Template

» Set Default Room Features for a Reservation Wizard Template

» Set User-Defined (UDF) Field Values for a Reservation Wizard Template

TO CONFIGURE THE RESERVATION WIZARD TEMPLATE

1. On the EMS Workplace menu bar, click Configuration > Administration > Reservation Wizard Templates. The Reservation Wizard Templates window opens. This window lists all the reservation wizard templates that are currently configured in your EMS database and that have a status of Active.

Reservation Wizard Template Window

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

2. Click New. The Reservation Wizard Template dialog box opens. The Reservation Wizard Template tab is the active tab.

3. Enter the summary information for the new reservation wizard template.

> Note: The only required information is the template description. All other information on all tabs is optional and can be added at a later date when needed.

Reservation Wizard Fields

FIELD	DESCRIPTION
Description	Required field. The name or description of the reservation wizard template. Note: This is the only required information for the group. All other information on all tabs is optional and can be added at a later date when needed. The description can be a maximum of 50 characters, including spaces.
Prompt for Date Number of Days to Select	Select this option if a reservationist/user is to be prompted with a start date for the reservation in the Reservation Wizard, and then in the Number of Days to Select field, enter the number of days that are to be automatically selected in the Reservation Wizard after the reservationist/user enters a start date for the event.
Video Conference	Select this option to apply the Video Conference option as a default field on the last page of the Reservation Wiz-

FIELD	DESCRIPTION
	ard when this template is used. Note: This option is not available in EMS Professional.

4. Click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

SET DEFAULT EVENT INFORMATION FOR A RESERVATION WIZARD TEMPLATE

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring.
2. Open the Defaults tab, and do the following for each reservation variable for which you want to specify a default value:

» Select the variable, and then click edit to open a Set Default Value dialog box.

» Enter the default value for the variable, and then click OK to close the Set Default Value dialog box and return to the Defaults tab.

3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

SET DEFAULT ROOM FEATURES FOR A RESERVATION WIZARD TEMPLATE

A feature is built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. You can configure a reservation wizard template so that the initial list of rooms that are available to a user who is making a reservation using the template is limited to only those rooms with these default features.

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring.
2. Open the Features tab, and on the Available list, select the feature, or CTRL-click to select the multiple features that the rooms are to have, and then click the Move button (>) to move the selected features to the Selected list.

3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

SET USER-DEFINED (UDF) FIELD VALUES FOR A RESERVATION WIZARD TEMPLATE

User defined fields, or UDFs, are custom fields that store additional information or data for a a reservation. For example, for a reservation, you might want to note the date that the contract for the event was

received and if the event was approved by a supervisor. You can select the default user defined fields that are to always apply to a reservation wizard template. These fields are displayed on the User Defined Fields tab in the Reservation Wizard.

1. If needed, open the Reservation Wizard Template dialog box for the reservation wizard template that you are configuring.
2. Open the User Defined Fields tab, and on the Available list, select the UDF, or CTRL-click to select the multiple UDFs that are to always apply to the template, and then click the Move button (>) to move the selected fields to the Selected list.

3. Continue with any other optional configuration for the template as needed; otherwise, click OK to close the Reservation Wizard Template dialog box and return to the Reservation Wizard Templates window with the newly configured template automatically selected.

Configuration > Other

This section guides you in configuring other data types, under Configuration > Other.

Configure Event Types

You can configure event types, which you use to classify or categorize the different events that your organization has. For example, you might configure lectures, meetings, and conferences, and so on as some of your event types.

TO CONFIGURE EVENT TYPES

1. On the EMS menu bar, click Configuration > Other > Event Types. The Event Types window opens. This window lists all the event types that are currently configured in your EMS database and that have a status of Active.

Event Types window

> Tip: Optionally, to view all event types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Event Type dialog box opens. The Event Type tab is the active tab.

Event Type dialog box, Event Type tab

3. Enter the information for the new event type.

FIELD	DESCRIPTION
Event Type	The name or classification for the event. Note: The event type can be a maximum of 30 char-

FIELD	DESCRIPTION
	acters, including spaces.
Internal	Indicates that the event type is internal to your organization. Note: Used for internal reporting purposes only. The event type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Reserved Color	Select the color that is to be used in the Reservation Book to indicate when the reserved time extends past the event time.
Event Color	Select the color that is to be used in the Navigator and in the Reservation Book to indicate this type of event.

FIELD	DESCRIPTION
	Note: Lighter colors are a better choice so as not to obscure the reservation/booking name.
EMS Web App Settings	
Display to Everyday Users	Indicates that events of this type are to be displayed when a user browses for events in EMS Web App. Note: If an event is labeled with a type for which this option has been cleared, then the event is not displayed when a user browses for the event in EMS Web App.
Allow Guest Request	Indicates that this event type is an available option in EMS Web App when requesting a room.
Available	Select this option to assign this event type to all everyday

FIELD	DESCRIPTION
to All Process Templates	user process templates.
Inactive	Leave this option blank to add the event type as an active event type. Select this option to inactivate the event type.

4. Open the Comment Types tab, and on the Available list, select the comment type, or CTRL-click to select the multiple comments types that are to be automatically applied when you create a new reservation with this event type, and then click the Move button (>) to move the selected comment types to the Selected list.

Event Type dialog box, Comment Types tab

> Tip: If the appropriate comment type is not available, you can configure it. See Configure Comment Types.

5. Open the Reminder Types tab, and on the Available list, select the reminder type, or CTRL-click to select the multiple reminder types that are to be automatically applied when you create a new reservation that uses this event type, and then click the Move button (>) to move the selected reminder types to the Selected list.

Event Type dialog box, Reminder Types tab

> Tip: If the appropriate reminder type is not available, you can configure it. See Configure Reminder Types.

6. Click OK. The Event Type dialog box closes. You return to the Event Types window with the newly configured event type automatically selected.

Configure Group Types

You can configure group types, which you use to classify or categorize the different groups that sponsor or hold events at your facilities. For example, if your organization is an academic organization, you might configure student groups, alumni groups, and so on for some of your group types.

TO CONFIGURE GROUP TYPES

1. On the EMS menu bar, click Configuration > Other > Group Types. The Group Types window opens. This window lists all the group types that are currently configured in your EMS database.

Group Types Window

2. Click New. The Group Type dialog box opens. The Group Type tab is the active tab.

Group Type Dialog Box, Group Type Tab

3. Enter the information for the new group type.

FIELD	DESCRIPTION
Group Type	The name or classification for the group type. Note: The group type can be a maximum of 50 characters, including spaces.

FIELD	DESCRIPTION
Default Pricing Plan	Select the default pricing plan that is to be applied when creating a new group. Note: If you select or edit a pricing plan for a group type, the information is not updated for existing groups of this group type. Instead, it applies only to new groups of this group type. Note: If the appropriate pricing plan is not available, you can configure it. See Configuring Pricing Plans.
Available to Every-day Users	Select this option if EMS Web App users are to be able to filter events by this group type when they are browsing for events.

4. Optionally, open the Calculations tab and on the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always

apply to this group type, and then click the Move button (>) to move the selected calculations to the Selected list.

Group Type Dialog Box, Calculations Tab

> Tip: If the appropriate calculation is not available, then you can configure it. See Configuring Calculations.

5. Click OK. The Group Type dialog box closes. You return to the Group Types window with the newly configured group type automatically selected.

Configure Reminder Types

A comment is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. A reminder is a comment that has a due date associated with it. You can configure reminder types, which you use to classify or categorize the different reminders that are applicable for your organization's business needs. For example, if your organization requires a deposit before a tentative reservation can be confirmed, then you might configure a reminder type of "Deposit Due."

TO CONFIGURE A REMINDER TYPE

1. On the EMS menu bar, click Configuration > Other > Reminder Types. The Reminder Types window opens. This window lists all the reminder types that are currently configured in your EMS database and that have a status of Active.

Reminder Types Window

Optionally, to view all reminder types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Reminder Type dialog box opens.

Reminder Type Dialog Box

3. Enter the information for the new reminder type.

FIELD	DESCRIPTION
Reminder Type	The name or classification for the reminder. Note: The reminder type can be a maximum of 30 characters, including spaces.
Days Allowed	Enter a value, or leave the default value of zero to use the current day's date as the basis for calculating the due date for the reminder.

FIELD	DESCRIPTION
Due Date Based On	Used in conjunction with the value that is specified in the Days Allowed field. » Reminder Added Date–Indicates that the reminder is due within the specified number of days after the date on which the reminder was applied. » Event Date–If the reminder is attached to a booking or to a service order, then the reminder is due within the specified number of days prior to the booking date. If the reminder is attached to a reservation, then the reminder is due within the specified number of days prior to the first booking date in the reservation.
Notes	Text entry that further defines or explains the reminder type. For example, a reminder called “Final Count for Catering” might have a default note that provides the name and phone number for the contact at the catering company.

FIELD	DESCRIPTION
	Note: The text that you enter here is displayed by default when you apply the reminder, but you can always edit it or delete it if needed.
Internal	Indicates that the reminder type is internal to your organization. Note: Used for internal reporting purposes only. The reminder type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Inactive	Leave this option blank to add the reminder type as an active reminder type. Select this option to inactivate the reminder type.

4. Click OK. The Reminder Type dialog box closes. You return to the Reminder Types window with the newly configured reminder type

automatically selected.

Configure Comment Types

A ***comment*** is a text entry that explains or clarifies a reservation, a booking, a group, or a booking detail that is a service order. You can configure ***comment types***, which you use to classify or categorize the different comments that are applicable for your organization's business needs. For example, if your organization's facilities are regularly scheduled for outside conferences, then applicable comment types could include Event Directions, Admission Cost and Requirements, Event Recap, and so on.

1. On the EMS menu bar, click Configuration > Other > **Comment Types**. The Comment Types window opens. This window lists all the comment types that are currently configured in your EMS database and that have a status of Active.

Tip: Optionally, to view all comment types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Comment Type dialog box opens.

3. Enter the information for the new comment type.

FIELD	DESCRIPTION
Comment Type	The name or classification for the comment type.

FIELD	DESCRIPTION
	Note: The comment type can be a maximum of 30 characters, including spaces.
Comments	Free form text that is appropriate for the selected comment type. Note: The information that you enter here is displayed by default when you apply the comment, but you can always edit it or delete it if needed.
Internal	Indicates that the comment type is internal to your organization. Note: Used for internal reporting purposes only. The comment type is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.

FIELD	DESCRIPTION
Print in Confirmation Footer	Select this option if the comment type is to be printed in the footer of reservation-level confirmations.
EMS Web App (Everyday User Application) Settings	
Display to Everyday Users	Select this option if the comment is to be displayed in EMS Web App when it is attached to a reservation or booking.
Display Text	Provides an expanded description of the comment type in EMS Web App when users are browsing events.
Inactive	Leave this option blank to add the comment type as an active comment type. Select this option to inactivate the comment type.

4. Click OK. The Comment Type dialog box closes. You return to the Comment Types window with the newly configured comment type automatically selected.

Configure Messages

Messages are typically added to the headers of confirmations, notifications, and invoices to further customize them.

A message is a block of text that your users can add to the headers and footers of confirmations, emails, and invoices. One header message, one footer message, or both can be added. You associate them with confirmations, emails, and invoices in reservation or booking under Settings > Confirmation Settings > Email Options:

Messages can be used for a variety of purposes, such as providing a simple greeting to a group who is making a reservation, providing event instructions and contact information, and so on. For example, a Greeting message might be something such as “Thank you for reserving...” You can configure and store a variety of messages and then your users can select whichever is most appropriate for a given situation.

1. On the EMS menu bar, click Configuration > Other > Messages. The Messages window opens. This window lists all the messages that are currently configured in your EMS database.

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

3. Enter the information for the new message.

FIELD	DESCRIPTION
Message	The name for the message. Note: The message name can be a maximum of 50 characters, including spaces.
Message Text	The un-formatted message in its entirety.

4. Open the Confirmation HTML tab and do one of the following:

» Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

» Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

5. Optionally, click Spelling to spell check the message before you save it.
6. Click OK. The Message dialog box closes. You return to the Messages window with the newly configured message automatically selected.

Configure Special Dates or Holidays

Special Dates are days that have special significance for your organization, for example, New Year's Day, Spring Break, Staff Retreat, and so on. Special Dates are displayed in various places throughout your EMS system. The special date designation is for informational purposes only and unless you specifically close the date to your users, your users are not prevented from making reservations or booking rooms on a special date or holiday.

This topic will provide information on the following:

- Work With Special Dates or Holidays
- Configure a Single Special Date or Holiday
- Configure Multiple Special Dates or Holidays
- Import a List of Special Dates or Holidays
- Configure Building Hours for a Special Date or Holiday

Note: You must configure your organization's Special Dates each calendar year. EMS Desktop Client does not assume that a day that is a special date or holiday for the current calendar year is also a special date or holiday for the next calendar year. You can configure Special Dates on an individual basis, you can configure multiple Special Dates, or you can use a wizard to import a list of Special Dates in a single step. Optionally, after you configure or import a list of Special Dates, you can configure the hours for the buildings that are affected by the special date or holiday. By default, buildings are configured to be "Open All Day." You can configure the hours for a building so that the building is open for only a specific time period on the special date or holiday, or the building is closed for the entire special date or holiday.

WORK WITH SPECIAL DATES OR HOLIDAYS

1. On the EMS menu bar, click Configuration > Other > **Special Dates**. The Special Dates window opens. This window lists all the Special Dates that are currently configured for all buildings in your EMS database and that have a date greater than or equal to the current day's date.

2. Optionally, do one or both of the following:

» To view all Special Dates in your EMS database, regardless of date, under Show, click **Old**.

» To view all Special Dates for a specific building, select the building on the Building dropdown list.

CONFIGURE A SINGLE SPECIAL DATE OR HOLIDAY

1. Click **New**. The special date or holiday dialog box opens.

2. Enter the information for the special date or holiday.

FIELD	DESCRIPTION
Date	The date for the special date or holiday.
Description	The description or name of the special date or holiday. **Note**: The description can be a maximum of 50 characters, including spaces.
Building	Select the building to which the special date or holiday applies. (The default value is all buildings.)
Notes	Any special notes or information about the special date or holiday.
Calendar Style	Select the print characteristics for the special date or holiday on the event schedule. **Note**: See .

FIELD	DESCRIPTION
EMS WEB APP SETTINGS	
Display to Everyday Users	Clear this option if you do not want the special date or holiday description to be displayed in EMS Web App .

3. Optionally, click **Spelling** to spell check the special date or holiday description before you save it.
4. Click **OK**. The special date or holiday dialog box closes. You return to the Special Dates window with the newly configured special date or holiday automatically selected.

CONFIGURE MULTIPLE SPECIAL DATES OR HOLIDAYS

1. Click **Wizard**. The special date or holiday Wizard opens.

Special Dates
Building:
(all)
Special Dates (0)
Description
Building
New
Edit
Delete
Print
Wizard
Hours
New
Edit
Delete
Print
Special Date Wizard
Date
Special Date
Calendar Style
Add
Remove
Import
Cancel
Next >

2. Click **Add.** The Add special date or holiday dialog box opens.
3. Enter the information for the special date or holiday.

FIELD	DESCRIPTION
Date	The date for the special date or holiday.
Description	The description or name of the special date or holiday. **Note**: The description can be a maximum of 50 characters, including spaces.
Calendar Style	Select the print characteristics for the special date or holiday on the event schedule. **Note**: See Configuring Calendar Styles.
Notes	Any special notes or information about the special date or holiday.

4. Click **OK**. The Add special date or holiday dialog box closes. You return to the special date or holiday Wizard window with the newly added special date or holiday selected in the window.
5. Repeat Step 2 through Step 4 until you have added all the needed Special Dates.
6. Click **Next**. The special date or holiday Wizard window is updated with a list of all the buildings that are currently configured in your EMS database.
7. Select the building, or CTRL-click to select the multiple buildings for which the special date or holiday is to apply, and then click Finish. You return to the Special Dates window with the newly configured Special Dates displayed in the window.

IMPORT A LIST OF SPECIAL DATES OR HOLIDAYS

If you use the wizard to import a list of multiple Special Dates, you can set the values only for the special date or holiday date, description, and notes. You cannot specify the calendar style, enter notes for the special date or holiday, or indicate that the special date or holiday is not to be dis-

played in EMS Web App. To configure any of the latter information for a special date or holiday, you must edit the special date or holiday.

1. Create a tab-delimited file that contains the information (in the order listed) for the Special Dates that are being imported.

» Date of special date or holiday (Required. Format is mm-dd-yy.)
» Description of special date or holiday (Required. 50 characters maximum, including spaces.)
» Notes (Optional. No maximum.)

> Tip: Each special date or holiday must be a separate line entry. To see the required format for the tab-delimited file, on the Special Dates window, click Print > **Import Format**. **See Also**: Import File Specifications.

2. Click **Wizard**. The special date or holiday Wizard opens.
3. Click **Import**, and in the Open File dialog box, browse to and select the tab-delimited text file that contains that Special Dates that you are importing, and then click Open. The special date or holiday Wizard window is updated

with a list of all the buildings that are currently configured in your EMS database.

4. Select the building, or CTRL-click to select the multiple buildings for which the Special Dates are to apply, and then click **Finish**. You return to the Special Dates window with the newly imported Special Dates displayed in the window.
5. Optionally, select a newly imported special date or holiday, and then do one or both of the following:

» Click **Edit** to edit the Notes, Calendar Style, and/or EMS Web App. Settings for the special date or holiday.

» Configure the building hours for the special date or holiday.

CONFIGURE BUILDING HOURS FOR A SPECIAL DATE OR HOLIDAY

1. If you have not already done so, on the EMS menu bar, click Configuration > Other > **Special Date** to open the Special Dates window.
2. Select a special date or holiday, and then click **Hours**. The Building Hours window opens. The date and title of the special date or holiday are

displayed at the top of the window. A list of all the buildings for which the special date or holiday applies as well as the hours of operation for each building are displayed in the window.

3. Select the building, or CTRL-click to select the multiple buildings for which you are modifying the hours of operation, and then click **Change**. The Building Hours dialog box opens.

4. Select the appropriate option on the Building Hours dialog box.

OPTION	DESCRIPTION
Set Building Hours	Select this option to specify the time period (Open and Close) during which the building is to remain open for the special date or holiday. Your EMS users can make reservations on this date in the selected buildings even if the events are scheduled outside the indicated time period. They merely receive a warning that the reservation time exceeds building hours.

OPTION	DESCRIPTION
	Note: EMS Web App users cannot make reservations outside of building hours.
Closed All Day	Select this option to close the building for the entire special date or holiday period. When you select this option, then a Web Only option is displayed on the Building Hours dialog box. » If you do *not* select Web Only, then none of your users (EMS or EMS Web App) can make reservations on this date in the selected buildings. » If you do select Web Only, then your EMS users can make reservations on this date in the selected buildings; however, your EMS Web App users cannot.
Open All Day	The default value. Leave this option selected to have the building remain open for the entire special date or holiday.

5. Click **OK**. The Building Hours dialog box closes. You return to the Building Hours window.
6. Repeat Step 3 through Step 5 until you have configured the building hours for all the buildings as needed.
7. Click **Close**. You return to the Special Dates window.

Configuring User Defined Fields (UDFs)

You can configure ***User Defined Fields,*** or ***UDFs***, which are custom fields that store additional information or data for a Building, a Group, a Group with a Reservation, a Reservation, a room, a service order, a guest request, or a web user.

For example, for a Reservation, you might want to note the date that the contract for the event was received and if the event was approved by a supervisor. For a guest request, you might want to inquire if alcohol will be served at the event. User defined fields are displayed on the User Defined Fields tab in the Reservation Wizard and on the User Defined Fields tab in the Navigator. If User Defined Fields have been completed for a Reservation, then these fields can be displayed on any confirmations and invoices that are generated for the Reservation.

CONFIGURE USER DEFINED FIELDS (UDFS)

1. On the EMS menu bar, click Configuration > Other > **User Defined Fields**. The User Defined Fields window opens. This window lists all the User Defined Fields of any type that are currently configured in your EMS database and that have a status of Active.

User Defined Fields window

» To view inactive User Defined Fields in your EMS database, under Show, click Inactive.

» To view only a specific type of User Defined Field, on the Type dropdown list, select a different type (Booking, Building, Group, Group/Reservation

(which is a Group for which a Reservation has been made), Reservation, Room, Service Order, Guest Request, or Web User).

2. Click New. The User Defined Field dialog box opens.

3. Enter the information for the new User Defined Field. To see more detailed information on UDF Field Types, see below.

USER DEFINED FIELD OPTIONS

FIELD	DESCRIPTION
Field Description	A name or description for the field.
Field Type	Select the type of data that the field is to hold (Text, Date, List, or Numeric). Note: If you select Text, then an option for displaying a multi-line textbox in EMS and EMS Web App is available. If you select List, then an Items tab is displayed on the User Defined Field dialog box. You must define the items that are to be displayed in the list. If you select List, then the "Allow Multi-Select" option appears. This lets your users pick multiple items from

FIELD	DESCRIPTION
	the list whenever the User Defined Field is used.
Field Applies To	Select the item to which the field applies: » Booking–Provides the ability for a user to enter a User Defined Field when creating a booking. » Building–Provides the ability to define a custom Building property for reporting in Query Builder. » Course–EMS Campus only. » Group–Provides the ability to enter User Defined Fields inside the group screen for each Group. » Group/Reservation–The UDF that is assigned to a Group when a new Reservation is created for the Group » Guest Request–Provides the ability for users to enter a User Defined Field when making a Guest Request. » Reservation–Provides the ability for users to enter a User Defined Field when making a Reservation.

FIELD	DESCRIPTION
	» Room–Provides the ability to define a custom Room property for reporting in Query Builder. » Service Order–Provides the ability for users to enter a User Defined Field when adding a Service Order. » Web User–Provides the ability for users to enter a User Defined Field when inside an Everyday User's options.
Category	Available only if you select Service Order for Field Applies To. Select the service order category for which the field applies. Note: If the appropriate category is not available, you can configure it. See Configuring Categories.
Default Value	Optional field. You can enter a default value for the User Defined Field. This value is displayed in the field but a user can edit it if needed.

FIELD	DESCRIPTION
	Note: If you assign a default value to a UDF, then the UDF is always added to the item. For example, if you assign a default value to a UDF that applies to Reservations, then the UDF is always added to any Reservation that any user makes in your EMS system.
Internal	Indicates that the UDF is internal to your organization. Note: Used for internal reporting purposes only. The UDF is not printed on external documents such as confirmations and invoices, and it is not hidden in any area of your EMS application.
Sequence	If a booking, Building, Group, a Group with a Reservation, a Reservation, a room, a service order, a guest request, or a web user is to have multiple User Defined Fields, then specify the display order of these

FIELD	DESCRIPTION
	fields. Fields are ordered from lowest to highest sequence number, with the field with the lowest sequence number being displayed first. Note: If you leave the sequence set to the default value of zero for all fields, then by default, the fields are displayed alphabetically.
DEPENDENCY	
Dependent Upon	Select a parent UDF. Your child UDF will be dependent on that parent. The parent UDF must be configured first and be a List type.
Answer	Select the answer that will cause your child UDF to display with the parent. If the right answer is not selected the child UDF will not show.

FIELD	DESCRIPTION
VALUE	
Required in EMS Desktop Client	Select this option if a user must enter a value in the field when making a Reservation in the EMS Desktop Client.
EMS WEB APP SETTINGS	
Display to Everyday Users	Select this option if you want the User Defined Field to be displayed when users are making a Reservation in EMS Web App.
Display Text	Enter the text that is to be displayed for the field in EMS Web App.
Inactive	Leave this option blank to add the User Defined Field an active field. Select this option to de-activate the field.

4. If you selected any field type other than List, go Step 5; otherwise, an Items tab is displayed on the dialog box. Open the Items tab, and for each list item for the UDF, do the following:

» In the Sequence field, enter the sequence for the list item.

» Items are ordered in a list from lowest to highest sequence number, with the item with the lowest sequence number being displayed first. If you set the sequence for all items to zero, then the items are displayed in the list alphabetically.

» In the Description field, enter a name or description for the item.

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

5. Optionally, click Spelling to spell check the User Defined Field before you save it.

6. Click OK. The User Defined Field dialog box will close and you will be returned to the User Defined Fields window.

UDF FIELD TYPES

DATE UDF

Allows the user to enter a value into a date field

LIST UDF

Allows the user to select an item or items from a list that you populate. The "Allow Multi-Select" option lets the user pick more than more than one item from the list.

Items of a list are configured on the "Items" tab.

NUMERIC UDF

Allows the user to enter ONLY a number into a text field.

TEXT UDF

Allows the user to enter any text into a text field.

Configure Reservation Sources

A reservation source indicates the origination of a reservation request, for example, walk-up, email, EMS Web App, and so on. You can specify a reservation source at the time that the reservation is being made in the Reservation Wizard, or at a later date. You can also specify the reservation source as part of the search criteria when searching for a reservation in the Browser. Configuring a reservation source simply consists of naming or describing the source.

TO CONFIGURE A RESERVATION SOURCE

1. On the EMS menu bar, click Configuration > Other > Reservation Sources. The Reservation Sources window opens. This window lists all the reservations sources that are currently configured in your EMS database and that have a status of Active.

Reservation Sources window

> Tip: Optionally, to view all reservation sources in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Reservation Source dialog box opens.

Reservation Source dialog box

3. In the Reservation Source field, enter a name or description for the new source, for example, Phoned In.

> Tip: The reservation source can be a maximum of 50 characters, including spaces.

4. Leave Inactive blank to add the reservation source as an active source. Optionally, select Inactive to inactivate the source.
5. Click OK. The Reservation Source dialog box closes. You return to the Reservation Source window with the newly configured source automatically selected.

Configure Cancel Reasons

When you are canceling a reservation in your EMS system, you can indicate a reason for the cancellation. You can configure a cancel reason that is as simple as a single word or phrase (for example, Event Postponed, Other, Will Reschedule), or you can configure it so that the user who is canceling the reservation must enter additional information about the cancellation.

1. On the EMS menu bar, click Configuration > Other > **Cancel Reasons**. The Cancel Reasons window opens. This window lists all the cancel reasons that are currently configured in your EMS database and that have a status of Active.

Cancel Reasons window

> Tip: Optionally, to view all cancel reasons in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Cancel Reason dialog box opens.

3. In the **Cancel Reason** field, enter a name or description for the new cancel reason (maximum 50 characters, including spaces), for example, Customer Postponed.
4. Optionally, do one or more of the following:

» If you want the user who is canceling the reservation to enter supporting information for this cancel reason, select **Require Notes.**

» If you want the cancel reason to be listed as an option for a user who is canceling the event in EMS Web App, then select **Display to**

Everyday Users.

» By default, a cancel reason is added as an active reason. Select **Inactive** to inactivate the reason.

5. Click **OK**. The Cancel Reason dialog box closes. You return to the Cancel Reasons window with the newly added reason automatically selected.

Configure Attachment Types

The term attachment is used to describe any file that you can add to or store on a reservation or booking. (Unlike a drawing, which is simply referenced, an attachment is actually stored in the EMS database with the reservation or booking record.) Attachments can be used for a variety of purposes, such as providing information about your company's alcohol policies, any special food concerns for the event's attendees, and so on. You can configure and store a variety of attachment types and then your users can select whichever type is most appropriate when working with attachments for a reservation or booking.

An attachment can also be a file that is saved with the room record or a group record. You do not specify an attachment type for a room record. For information about adding an attachment to a room record, see To add attachments to a room. For information about adding an attachment to a group, see the EMS User's Manual.

TO CONFIGURE AN ATTACHMENT TYPE

1. On the EMS menu bar, click Configuration > Other > Attachment Type. The Attachment Types window opens. This window lists all the attachment types that are currently configured in your EMS database and that have a status of Active.

Attachment Types Window

Tip: Optionally, to view all attachment types in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Attachment Type box opens.

Attachment Type Dialog Box

3. In the Description field, enter a name or description for the new attachment type, for example, Alcohol Policy.

Tip: The description can be a maximum of 30 characters, including spaces.

4. By default, an attachment type is added as an active type. Select Inactive to inactivate the attachment type.
5. Click OK. The Attachment Type dialog box closes. You return to the Attachment Types window with the newly added attachment type automatically selected.

Configure Word Merge Documents (Optional Module)

EMS provides options for producing pre-formatted documents that contain reservation information such as confirmations. Your organization, however, might have
organization-specific information that must be included in these documents. Using the optional Word Merge module, you can configure Word Merge documents to produce confirmations, contracts, and so on that contain not only selected reservation information from EMS, but also, any information that is required by your organization. To configure a Word Merge document, you must first create the Word document and apply the appropriate tags to indicate the information in EMS that is to be pulled into the document. You can then add this document to your EMS database and use it to generate confirmations, contracts, and so on.

This topic will provide the following information:

» Create and Tag a Word Document
» Add the Tagged Word Document to Your EMS Database

CREATE AND TAG A WORD DOCUMENT

1. Create the necessary document in Microsoft Word.
2. Tag the text that is to be replaced with EMS field values accordingly. For example, if you want the Reservation Status in the Word document to be replaced with the EMS field value for Reservation Status, then any reference to Reservation Status in the Word document should be tagged as <<Reservation Status>>.

> Tip: To view a complete list of the text that can be replaced in the Word document with EMS field values and the correct tags for this text, on the EMS menu bar, click Configuration > Other > Word Merge Documents, and on the Word Merge Documents window that opens, click Print > Word Merge Format. If you want to save this document for easier access and reference, then after opening the document, click Export on the document toolbar, and export the document as a Rich

Text Format (.rtf) document to a location of your choosing. You can then use Microsoft Word to open the document at any time.

ADD THE TAGGED WORD DOCUMENT TO YOUR EMS DATABASE

1. On the EMS menu bar, click Configuration > Other > Word Merge Documents. The Word Merge Documents window opens. This window lists all the Word Merge documents that are currently configured in your EMS database and that have a status of Active

Word Merge Documents Window

Tip: Optionally, to view all Word Merge documents in your EMS database regardless of status, under Show, click Inactive. The Word Merge Document dialog box opens.

2. Click New.

Word Merge Document Dialog Box

3. In the Description field, enter the name or description for the Word Merge document.

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

4. Click the Search icon to open the Find Microsoft Word Document dialog box, and then browse to and select the Word document. The Find Microsoft Word Document dialog box closes. You remain on the Word Merge Docu-

ment dialog box tab with an entry for the document displayed in the Document field.

5. Optionally, do one or more of the following:

» Select a default attachment type for the document.

> Tip: If the appropriate attachment type is not available, you can configure it. See Configuring Attachment Types.

» Click Spelling to spell check the attachment notes before you save the document.

» By default, a Word Merge document is added as an active document. Click Inactive to inactivate the document.

6. Click OK. The Word Merge Document dialog box closes. You return to the Word Merge Documents window with the newly configured document automatically selected.

Configure Calendar Styles

Calendar styles determine the font, font size, and color (for example, Arial, 9 pt., Black) that are used when event information is printed on the Event Schedule report and on the Event Calendar report.

For both reports, you must select the Use Calendar Styles option on the Options tab. You set the calendar style that is to be used for an event when making the reservation for the event in the Reservation Wizard. See the EMS User's Manual.

TO CONFIGURE CALENDAR STYLES

1. On the EMS menu bar, click Configuration > Other > Calendar Styles. The Calendar Styles window opens. This window lists all the calendar styles that are currently configured in your EMS database and that have a status of Active.

Calendar Styles Window

Tip: Optionally, to view all calendar styles in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Calendar Style dialog box opens.

Calendar Style Dialog Box

3. Enter the information for the new calendar style.

» In the Calendar Style field, enter name or description for the calendar style.

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

» In the Font field, the default calendar style is listed. You can leave this value as is, or you can click the Browse button to open the Font dialog box, and specify the font, font size, and font color for the new calendar style.

Tip: To reset the font characteristics to their default values, click Reset.

4. Leave Inactive blank to add the calendar style as an active style. Optionally, select Inactive to inactive this calendar style.
5. Click OK. The Calendar Style dialog box closes. You return to the Calendar Styles window with the newly configured calendar style automatically selected.

Configuration > Everyday User Applications

This section guides you in configuring elements for EMS "Everyday User" applications, under Configuration > Everyday User Applications.

Concept: Everyday User Applications = EMS Web App, EMS Mobile App, EMS for Outlook, EMS Kiosk, EMS Glance

Settings in this area of EMS Desktop Client control features and behavior for these applications.

- Configuration > Everyday User Applications *(user profiles)*
- Configure User Templates *(booking templates for everyday users)*
- Configure Everyday User Security Templates *(security templates for everyday users)*
- *(menu settings for the EMS Web App)*
- Configure Help Text *(help text settings for Everyday User Applications)*
- Configure Language Translations *(language translation settings for Everyday User Applications)*

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

users, security templates, process templates, menus and links, and help text.

Configure Everyday Users

An Everyday User is someone who can request or reserve space and services in any EMS Software application other than EMS Desktop Client. You assign these users to templates.

This section guides you in configuring one Everyday User at a time. Once you have configured these users, you may need to assign them to security templates and one or more process templates.

- To assign users to Everyday User process templates, see Assigning Templates to an Everyday User.
- To assign multiple templates to multiple users in a single step, see Assigning Templates to Multiple Users.

> Concept: EMS classifies users into two categories: Guests/Visitors and Everyday Users.

> Tip: You configure EMS Desktop Client user accounts in a different area (under the System Administration>Security menu). For instructions, See Also: Configuring EMS Desktop Client User Accounts.

Additionally, if your organization uses EMS Human Resources Toolkit to manage Everyday User accounts, See Also: Using EMS HR Toolkit.

Lastly, a set of Account Management parameters control account management behavior. To see these parameters, refer to EMS Web App System Parameters.

1. On the EMS Desktop Client menu bar, click Configuration > Everyday User Applications > Everyday Users. The Everyday Users window opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.

2. Check that the user you wish to configure does not already exist. Enter the user name or email address in the Find field.

> Tip: This search string is not case-sensitive, but your entries must be in the correct order. For example, if searching by Email Address, a search string of bob returns bobworth@emssoftware.com but not dbobbett@emssoftware.com.

You can narrow your search results by:

- Group Type
- City
- Status
- Process Template

3. Then click Display; search results show in the lower pane of the window. If your user does not already exist in EMS, proceed to the next step.

> Note: If the EMS system parameter "Users linked to Groups via External Reference" is set to Yes, then you will also see a Group column and a City column.

4. Create a new user. Click the New button. A dialog box opens.

> Note: If the user has confirmed membership (by responding to an email containing an activation link), the Validated checkbox highlighted below will be selected.

the user had to answer questions when requesting an account, you

an view the user's responses on the User Defined Fields tab.

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

5. Enter information for the new user. User name and email address are required; password is only required if not using the optional Integrated Authentication module. All other information is optional and can be added later as needed.

FIELD	DESCRIPTION
Name	The name of the user. (Maximum of 30 characters, including spaces).
Password	The password that the user must enter to log in to EMS Web App. If using the optional Integrated Authentication module, Password can be left blank since the network password is used instead.

FIELD	DESCRIPTION
Email Address	Enter the full email address for the user as the user must enter this address to log in to EMS Web App.
Phone 1 /Phone 2	Optional fields.
Notes	Optional field. Read-only.
External Reference	Optional field. Links the user to an outside program such as EMS Human Resources Toolkit if needed.
Network ID	The user's network ID.
Email Opt Out	Optional field. Select this option if you do not want the user to receive automatic emails (such as reservation summary emails) from EMS Web App. The user can still

FIELD	DESCRIPTION
	receive manually sent emails.
Status	Required field. Select the status for the user: • Active—The user can log in to EMS Web App, EMS Mobile App, and EMS for Outlook. • Pending—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is informed that he/she must check back at a later time. • Inactive—The user cannot log in to EMS Web App, EMS Mobile App, and EMS for Outlook and is instructed to contact the EMS administrator.
Security Template	Required field. This determines the user's access to the system (i.e., the menu items the user can see and the

FIELD	DESCRIPTION
	event information that the user can view).
Time Zone	Optional field. The time zone in which the user is located. Beginning in version 44.1, it is strongly recommended that users are assigned to a time zone for an optimal experience on all Everyday User Applications.
Validated	When checked, users who created their own accounts have confirmed membership (by responding to a email containing an activation link). When unchecked, the user will not be able to use EMS Web App.

5. Assign process templates to the new user. Open the Process Templates tab. The process templates you assign here will appear as menu items to the user in EMS Web App, EMS Mobile App, and EMS for Outlook.
6. Specify Groups on whose behalf the user can create and manage reservations. Open the Groups tab. To filter the list of active groups displayed, use the Find and Type fields and then click Display. Select one or

more Groups (use CTRL-click for multiple groups), and then click Move (>) to move the selected groups to the Selected list.

7. Specify Delegates the user can impersonate. Open the Delegates tab; to see all available users, simply click Display. To narrow the search results, use the Search by dropdown list to search by User Name or Email Address. Select one or more delegates (using CTRL-click for multiple delegates), and then click Move (>) to move the selected users to the Selected list.

> Tip: Click Spelling to spell-check any information that you manually entered for the user.

8. Click OK. The dialog box closes and returns you to the users window with the newly configured user automatically selected.

Licensing for Everyday Users

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

1. Select the Configuration > Everyday User Applications > Everyday Users.
2. To delete users, select them and click the Delete button.
3. To deactivate users, select them, click the Edit button and set the Status field to Inactive.

Notes: If you use HR Toolkit, users that are no longer part of the feed or part of your organization will automatically be deactivated. A License Notification message will display when opening the Desktop Client if the user license has been exceeded.

Emailing an Everyday User

Whether your organization uses Microsoft Outlook or SMTP, you can email an everyday user.

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

1. Search for the user whom you are emailing. See Also: Searching for a user.
2. On the user's window, make sure that the user is selected in the lower pane, and then click More > Email.

> Tip: Depending on how your system is configured, either a pre-addressed Outlook email form or a pre-addressed SMTP email form opens. The To field is populated with the email address that is defined for the user, but you can edit this value if needed.

3. Complete and send the email as you normally would.

Configure Groups and Contacts from an Everyday User

After you have configured a new user, you can create groups and contacts from the user.

1. On the EMS menu bar, click Configuration > Everyday User Applications > Everyday Users. The Everyday Users window opens. The number of configured users for EMS Web App shows in the upper left corner. The number of users for which your organization is licensed shows in the top center.

2. Locate the user you wish to work with. Specify any combination of search criteria, and then click Display to see all users that meet the criteria.

> Tip: If you leave the Find field blank, a list of all currently active users appears. This field is not case-sensitive, but entries must be in the correct order. For example, a search string of Bar returns Barry Jones, but not Amanda Barry.

3. Continue to one of the following (below):

» Configuring a group from a user
» Configuring a contact from a user

CONFIGURE A GROUP FROM A USER

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

2. Configure the new Group as needed. See Configuring Groups.

CONFIGURE A CONTACT FROM A USER

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

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

4. Enter the information for the new contact.

FIELD	DESCRIPTION
Contact	By default, the Contact field is populated with the name of the user that you selected, but you can edit this value if needed.

FIELD	DESCRIPTION
	Note: The name can be a maximum of 50 characters, including spaces.
Title	The job title of the Contact.
Group	Populated with the name of the Group that you selected. You cannot change this value.
Address	Populated with the address of the Group that you selected. If the Contact address is not the same as the Group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone	The phone number and fax number for the group.

FIELD	DESCRIPTION
Fax	Note: The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program or another EMS record if needed.

FIELD	DESCRIPTION
Notes	Any other information that is pertinent for the contact. This information only displays within the EMS Desktop Client.
Set as Default	Select this option if the contact is to be the default Contact for the selected Group. Note: If a default Contact has been defined for a Group, then when you specify the Group information for a reservation, the Contact field is automatically populated with the name of the default Contact. Note: You can always specify a Contact as the default contact for a selected Group at a later date. To do so, select the Contact in the right pane of the Group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.

FIELD	DESCRIPTION
Inactive	Leave this option blank to add the Contact as an active Contact. Select this option to de-activate the Contact.

> Tip: You can click Spelling to spell-check before saving.

5. Click OK. The Contact dialog box closes and the Contact is created from the user and added to the Group. The Group-specific window opens with the Contact selected.

Assign Templates to Everyday Users

This section guides you in assigning Everyday User process templates to a single user. To assign these templates to multiple Everyday users in a single step, see Assigning Web Templates to Multiple Everyday Users

1. On the EMS menu bar, click Configuration > Everyday Applications > Everyday Users. The Everyday Users window opens.

2. In the Find field (in the upper portion of the screen), search for the user to whom you wish to assign Everyday User process templates by entering at least the first three characters of their user name or email.

Tip: You can further narrow your search results by:

- Group Type
- City
- Status
- Process Template

3. Click Display.
4. Select the user and click the Edit button on the right.
5. In the Everyday User editing window, click the Process Templates tab.

Process Templates Tab

6. To assign process templates to an Everyday User, move them to the right side using the arrow button. Your selections here will present to the user in

EMS Web App as available booking options under "My Templates."

7. Click OK. The Everyday Users dialog box closes and returns you to the Everyday Users window.

Configure Everyday User Process Templates

Concepts:

Everyday User—Someone who can request or reserve space and services in any EMS Software application other than EMS Desktop Client. You assign these users to templates.

Everyday User Template—Defines and controls what a user can do. EMS uses two types of everyday user templates:

Security template—This is essentially a security profile: it controls which menu items are available to the users assigned to the template, which booking information fields display to them, and other information.

Process template—This is essentially a booking template: it controls what users can do for different types of reservations (conference room, workspace, study room, and so on). This type of template also controls users'

date/time restrictions, room security (reserve, request only, no access), and service availability (A/V, catering, and so on).

If you have previously used older versions of EMS, you may know booking templates as "Web Process Templates." These are now called "Everyday User Process Templates." These templates define user access and booking behavior in EMS Web App, EMS Mobile App, and EMS for Outlook. Similarly, you may know permissions templates, which control what an Everyday User is able to do, as "Web Security Templates." These are now called "Everyday User Security Templates."

1. On the EMS menu bar, click Configuration > Everyday Applications > Everyday User Process Templates. The Everyday User Process Templates window opens on the Everyday User Template tab.

This window lists the process templates that have been defined for your EMS Web App implementation. The pre-defined user called "(unauthenticated user)" is included in all EMS implementations; you use this template to manage settings for anonymous or “guest” users. For a user

to be able to view and use this template, you must assign the user to the template. See Configuring Users.

> Tip: To view all everyday user process templates in your EMS database, regardless of status, under Show, click Inactive.

2. Click New. The Everyday User Process Template dialog box displays. Enter the information for the new everyday user process template as needed.

3. Enter the information for the new web process template as needed. See:

» Web Template Tab

» Booking Rules Tab

» Defaults Tab

- Video Conference Tab
- Rooms Tab
- Category Tab
- Event Type Tab
- LDAP Groups Tab
- User-Defined Fields (UDF) Tab
- Parameters Tab
- Web Text Tab
- Menu Text Translations Tab
- Terms and Conditions Tab

> Warning: The cache must be cleared in the EMS Web App whenever parameter changes are made in the EMS Desktop Client.

> Tip: The Request Status field is used to configure booking templates for the "Request/Approval" booking model, in which everyday users request space and administrative users approve those requests (using the Dashboard menu icon). For example, if you set this field to

> Request, then the booking will not be finalized until an administrator has approved it.

If you are configuring a template for booking desks and workspaces or "hoteling," see Create Templates for Desks and Workspaces.

Web Template Tab

The table below provides information on configuring the Web Template tab.

FIELD	Description
Description	Read-only information.
Mode	Determines how a user can make a reservation in EMS Web App. » Request - Everyday Users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not provide options for the Everyday User to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS Desktop Client user. The room is not taken out of inventory until this step has occurred.

FIELD	Description
	» Self Serve - Registered Everyday Users can view real-time room availability (in list or grid views) and create actual reservations in the EMS database. Rooms can be booked in a confirmed or request status based on your configuration and business process. Note: You must select this option if the Everyday Users who are attached to this Everyday User Process Template must be able to request rooms that have a video conferencing feature. » Service Only Request - Allows Everyday Users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS. Note: Various settings within the Everyday User Process template are enabled/disabled based on the selected mode.

FIELD	Description
Menu Text	The menu text or link that an EMS Web App user sees when requesting a room using this Everyday User Process template.
Available to New Everyday Users	Select this option if this Everyday User Process template is to be automatically assigned to newly registered Everyday Users.
Enable for Mobile Device	Select this option if this Everyday Process template is to be available (in an appropriate format) on a mobile device browser.
Outlook	Enables the Everyday Process template for use with the EMS for Outlook Add-in.
Parent Menu	The parent menu item on the EMS Web App main menu under which the name of this template appears.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reserveable' on the Rooms tab.
Request Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'requestable' on

FIELD	Description
	the Rooms tab.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by Everyday Users attached to this template that result in a conflict (the room is already booked).
Cancel Status	Available only for Self Serve mode. The default status that is applied to bookings that are canceled by Everyday Users who are attached to this template.
Rule Violation Status	Enabled only if Outlook is selected. Used in conjunction with the EMS for Outlook module. If you carry out an action in the EMS for Outlook module that violates a category date/time restriction, then the booking is changed to this status.
Default Setup Type	The setup type that is selected by default for a room search when a Everyday User who is attached to this template is reserving a room in the EMS Web App. The Everyday User can always select a different value.
Allow Invit-	Enabled only if your organization has purchased the optional Plan a

FIELD	Description
ations	Meeting (PAM) module. Select this option if users who are attached to this template must be able to see the free/busy schedules of the attendees. The Everyday User can choose a date and time that is convenient for all attendees and then send invitations through the EMS Web App, which attendees receive and can manage through Outlook.
Allow Everyday User Personalization	Select this option if Everyday Users must be able to use the Options feature to customize their settings on EMS Web App pages.
Menu Sequence	Enter a number that indicates the order in which this menu option is relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are

FIELD	Description
	displayed alphabetically.
Available at Checkout	Select this option if the Everyday Users who are attached to this template must be able to select category resource items on the EMS Web App “checkout page” (the last page in the Room Request process) in EMS Web App.

Booking Rules Tab

1. Open the Booking Rules tab.

Booking Rules Tab

2. In the Booking Requirements pane, do the following:

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

3. Use the time of day and number of days or the number of hours to dictate how far in advance of an event a booking can be canceled.

- To use a specific cutoff time, select Use Cancellation Cutoff Time, and in the Cutoff Time and Number of Days fields, specify a time of day and a number of days, respectively. For example, if you enter 3 p.m. and one day, then cancellation must take place before 3 p.m. on the day before the event.
- To use the number of hours instead of a specific time as a cutoff, clear Use Cancellation Cutoff Time and in the Cancellation Cutoff Hours field, specify a number of hours. For example, if you enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day.

4. Optionally, select one or both of the following:

- Cancel Booking in Progress–An Everyday User can cancel a booking that is currently in progress. If you select this option, then the Cancel Booking in Progress Status option is enabled. The status that you select here is applied to bookings that an Everyday User cancels after the booking is already in progress.
- End Booking in Progress–An Everyday User can end a booking that is in progress early, which makes the room available to other Everyday Users.

5. In the fields in the Booking Days panel, indicate how far into the future bookings can be made and how much lead time is required to make a booking.

- If you select Range of Days from the first dropdown menu, then you must also specify a value for Only Allow New Bookings within Range of This Many Days. If you select Specific Date, then you must specify a value for Only Allow New Bookings Prior to This Date to dictate the future range.
- The second dropdown menu sets the lead time requirement. If you choose Range of Days, you must indicate a cutoff time or cutoff hours as you did for cancellations. If you choose Specific Date, you must select a date in the Only Allow New Bookings After This Date field.

6. Optionally, to restrict bookings for reservations made in EMS Web App, enter a value for one or both of the following:

» Max. No. Bookings Per Day–Restricts the maximum number of bookings that are allowed per day. The default value of zero indicates that no restrictions are imposed.

» Max. No. Bookings per Date Range–Restricts the maximum number of bookings that are allowed per date range. The default value of zero indicates that no restrictions are imposed.

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

Defaults Tab

1. Open the Defaults tab.

Defaults Tab

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

> Tip: If the appropriate event type is not available, you can configure it. See Configure Event Types. If the appropriate building is not available, you can configure it. See Configuring Buildings.

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

Video Conference Tab

Note: This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the Everyday User Template tab. For information on how to configure the information on this tab correctly so that users who are attached to this Everyday User Process template can request rooms that have a video conferencing features.

Video Conference Tab

Web Process Template
Web Template
Booking Rules
Defaults
Video Conference
Rooms
Categories
Event Types
LDAP Groups
User Defined Fields
Parameters
Web Text
Feature:
Host Event Type:
(none)
OK
Cancel

Rooms Tab

1. Open the Rooms tab.

Rooms Tab

2. Specify your Building and Room Type search criteria.

> Tip: On the Building dropdown list, you have the option of selecting all buildings, just a specific building, an area, or a view. If any of the appropriate items are not available, you can configure them. See Configuring Buildings, Configure Areas, Configure Public Views, or Configure Room Types.

3. On the Available list, select the room or CTRL-click to select the multiple rooms that users who are attached to this Everyday User process template must be able to book, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.

» Move rooms that can be reserved without approval (that is, booked into the Reserve Status on the Web Template tab) into the Reserve pane.

» Move rooms that require approval (that is, booked into the Request Status on the Everyday User Template tab) into the Request pane.

Category Tab

1. Open the Categories tab.

Category Tab

2. On the Available list, select the category or CTRL-click to select the multiple categories that users who are attached to this Everyday User process template must be able to add to a booking, and then click the Move button (>) to move the selected categories to the Selected list.

> Tip: If the appropriate category is not available, you can configure it. See Configure Categories.

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

Event Type Tab

1. Open the Event Types tab.

Event Type Tab

2. On the Available list, select the event type or CTRL-click to select the multiple event types that users who are attached to this Everyday User Process

template must be able to select, and then click the Move button (>) to move the selected types to the appropriate Selected list.

» Move the event types that apply only to this Everyday User Process template into the Selected pane.

» The Available to All Everyday User Process Templates pane displays all the event types that have the Available to all Everyday User Process Templates option selected. See Configure Event Types.

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

LDAP Groups Tab

You use this tab to assign Everyday User Process templates to EMS Web App users based on LDAP Groups that are defined in your directory service, for example, Active Directory.

> Note: Everyday User Process templates that are assigned via LDAP do not need to be explicitly assigned to Everyday user records. When Everyday Users log in to EMS Web App, they “inherit” the Everyday User Process templates based on the LDAP groups to which they belong.

1. Open the LDAP Groups tab.

LDAP Groups Tab

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

User-Defined Fields (UDF) Tab

1. Open the User Defined Fields tab.

User-Defined Fields Tab

2. On the Available list, select the question or CTRL-click to select the multiple questions that users who are attached to this Everyday User template must

answer when reserving space, and then click the Move button (>) to move the selected questions to the appropriate Selected list.

- Move questions that require an answer into the Required pane.
- Move questions that are optional into the Optional pane.

> Tip: If the appropriate UDF is not available, you can configure it. See Configuring User Defined Fields (UDFs).

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

Parameters Tab

1. Open the Parameters tab.

Parameters Tab

Area	Description	Source	Value
Email	Default Subject for Email	Global	Request Summary
Email	Email Address of Sender	Global	sales@dea.com
Email	Format for Request Summary	Global	Detail
Email	Name of Email Sender	Global	Scheduling Office
Email	Send Request Summary upon Submit	Global	No
Reservations - Checkout	Allow Billing Reference Lookup	Global	Yes
Reservations - Checkout	Allow PO Number Lookup	Global	Yes
Reservations - Checkout	Allow Temporary Contacts	Global	Yes
Reservations - Checkout	Billing Reference Validation	Global	No Validation
Reservations - Checkout	PO Number Validation	Global	No Validation
Reservations - Checkout	Require Contact Email	Global	No
Reservations - Checkout	Require Contact Phone	Global	Yes
Reservations - Checkout	Reservation Comment Type on Checkout	Global	(none)
Reservations - Checkout	Show 2nd Contact	Global	Yes
Reservations - Checkout	Show Billing Reference on Reservation	Global	No
Reservations - Checkout	Show PO Number on Reservation	Global	Yes
Reservations - Room Request	Allow User to Change Setup Count in Selected Locations Area	Global	No
Reservations - Room Request	By Default, Enable Add to Calendar Checkbox (for PAM)	Global	Yes
Reservations - Room Request	Default Room Availability View	Global	Grid
Reservations - Room Request	Default Value for Attendance	Global	0
Reservations - Room Request	Display Areas as Filter	Global	No
Reservations - Room Request	Exclude Closures From Date Calculations	Global	No

2. By default, an Everyday User Process template inherits its parameter settings from the global list of EMS Web App parameters. You can review the

values for these parameters, and edit the values as needed for the template.

- To edit the value for a parameter, select the parameter, and then click Edit.
- To reset the value for a parameter to its default global value, select the parameter, and then click Use Global.

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

Web Text Tab

1. Open the Web Text tab.

Web Text Tab

2. By default, web text items inherit their settings from the global Web Text list. (See Configure Web Text.) You can use the list of web text items on the

Web Text tab to override the settings for this particular template if needed.

- To edit the value for a web text item, select the item, and then click Edit.
- To reset the value for an item to its default global value, select the item, and then click Use Global.

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

Menu Text Translations Tab

> Tip: You need to provide information on this tab only if a foreign language translation has been defined for Everyday User templates.

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

Terms and Conditions Tab

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

1. Open the Terms and Conditions tab.

Terms and Conditions Tab

2. Format a Terms and Conditions message that is displayed in the EMS Web App when an Everyday User selects a room.

» Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.

» Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the Terms and Conditions.

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

Configure Everyday User Security Templates

A security template specifies which menu items are available to the users who are assigned to the template, which event information fields can be viewed, and other information.

This topic will provide information on the following steps:

- Entering Security Template Settings
- Assigning Roles to Users
- Setting Tooltip Display
- Finalizing the Template

1. On the EMS menu bar, click Configuration > Everyday User Applications > Everyday User Security Templates. The Everyday User Security Templates window opens. This window lists the one user role (unauthenticated user) used in the EMS Web App and EMS Mobile App, as well as any other security templates that have been defined.

Everyday User Security Templates
Everyday User Security Templates (4)
(unauthenticated user)
Web Admin
Web Manager
Web Standard
New
Edit
Delete
Print
Copy
Assign
Close

Note: The "(unauthenticated user)" role controls what happens when users do not have a log in access an EMS Everyday User application such as EMS Web App and EMS Mobile App.

Tip: The remainder of this procedure describes how to configure a security template “from scratch.” You can also configure a security template by copying an existing rule. Select the security template that you wish to Copy then skip to Step 3. To assign an existing security template to multiple users, See Also: Assigning a Security Template to Multiple Users.

2. Click New. The Security Template dialog box opens on the Security Template tab.

ENTERING SECURITY TEMPLATE SETTINGS

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

OPTION	DESCRIPTION
Description	The description or name for the security template.

OPTION	DESCRIPTION
	Note: The description can be a maximum of 50 characters, including spaces.
Allow User to Add Groups	Selected by default. Users who are attached to this security template can select from a list of existing Groups in your EMS database to add to the users' accounts when submitting a request or making a reservation.
Allow User to Add Contacts	Select this option if you want users who are attached to this security template to be able to select from a list of existing Contacts in your EMS database when submitting a request or making a reservation.
Allow User to Set Default	Available only if Allow User to Add Contacts is selected. Select this option if you want users who are attached to this template to be able to specify a default Contact for a

OPTION	DESCRIPTION
Contact	selected Group when submitting a request or making a reservation.

ASSIGNING ROLES TO USERS

4. Roles are the tasks that an assigned user can do. Open the Roles tab, and on the Available list, select the role (CTRL-click to select multiple roles) for the user(s) are to be assigned to this template, and then Move (>) to the Selected list.

ROLE	DESCRIPTION
Allow Check In	Allows a user to check in to a booking from EMS Web App, the EMS Kiosk, and EMS Mobile App.
Browse Events	Provides access to the Events calendar in EMS Web App.

ROLE	DESCRIPTION
Browse	Allows a user to browse for available rooms in a Schedule view.
Create\Edit an Account	For the (unauthenticated user) template, allows a new user to create his/her own EMS Web App user account. This new everyday user account is set to active or pending based on your EMS Web App parameter settings. For the authenticated users, this role determines if an existing everyday user can access the Edit My Account area within EMS Web App.
Custom Events	Provides access to any custom events calendars created.
Delegation	Allows EMS Web App users to delegate control of their reservations (new and existing) to other EMS

ROLE	DESCRIPTION
	Web App everyday users.
Browse People	Allows a EMS Web App user to view a specific Group's reservations for today.
Location Details	Allows a user to view details (room type, size, phone, features, setup types, images and so on) about a room.
Login\Logout	Allows an anonymous user or “guest” to log in to EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a EMS Web App user to view and book rooms on a floor plan.
Web Admin-	Provides access to various administrative functions

ROLE	DESCRIPTION
istrator	within EMS Web App such as clearing the cache, enabling help text edit mode, and enabling detailed errors.

SETTING TOOLTIP DISPLAY

5. The Booking Details Display Fields tab houses the information that appears when a EMS Web App user browses events in the Browse Events area or browses for space in the Browse for Space Area. Open this tab, and on the Available list, select the information you want displayed (CTRL-click to select multiple items), then Move (>) to the Selected list.

FINALIZING THE TEMPLATE

6. Click OK. The security Template dialog box closes. The changes are saved to the template and you return to the security Templates window.

> Tip: You can delete a security template by selecting it from the Everyday User Security Template window and clicking Delete. If the template is assigned to a user, you will be prompted to assign another template to that user before deleting it.

You can also print a security template information in two ways, using the Print button: you can print a list of your templates, or a list of user roles showing how they are mapped to security templates.

Everyday User Security Template Field Definitions

SECURITY TAB

OPTION	DESCRIPTION
Description	The name for the web security template. Note: Maximum of 50 characters, including spaces.
Allow User to Add Groups	Enables users to add existing Groups for which they book space to their accounts. Selected by default. Users can add existing Groups for which they make reservations to their accounts.
Allow User to Add Contacts	Enables users to indicate if a Contact should appear by default when the Group is selected for a reservation. Select this option if you want users to add existing

OPTION	DESCRIPTION
	Contacts to existing Groups on their account.
Allow User to Set Default Contact	Available only if Allow User to Add Contacts is selected. Select this option if you want users to assign default contact for a Group when making reservations.

ROLES TAB

ROLE	DESCRIPTION
Allow Check In	Allows a user to check in to an event in rooms requiring check-in.
Browse Events	Allows the user to view a schedule of events at the organization as well as more information about these events.

ROLE	DESCRIPTION
Browse Locations	Allows the user to view a schedule view of rooms at the organization.
Create\Edit an Account	Allows new unauthenticated users ("guests") to create user accounts (set to Active or Pending based on your parameter settings). For authenticated users, allows users to change their account information.
Custom Events	Allows users to view a customized schedule of events created by an Administrator using the Generate Custom Link utility.
Delegation	Allows users to assign other users as delegates for impersonation.
Browse People	Allows users to look up Groups at their organization to see where these Groups are meeting today.

ROLE	DESCRIPTION
Location Details	Allows users to view details (room type, size, phone, features, setup types, images and so on) about a room or a building.
Login\Logout	Allows unauthenticated users ("guests") to log in to EMS Web App.
View Floor Map	Requires the optional Floor Plan module. Allows a Everyday User to view and book rooms on a visual floor plan. If licensed for the additional Floor Map module, users can view and request rooms from a floor map of a building.
Web Administrator	Enables the Admin Functions menu option for these users designated as administrators. The menu controls various administrative functions within EMS Web App, such as clearing the cache, enabling help

ROLE	DESCRIPTION
	text edit mode, displaying detailed error messages, and configuring optional integration modules.

Assign Security Templates to Multiple Everyday Users

When you configure an everyday user, you can assign one security template and multiple process template to that user. Instead of assigning templates one at a time to individual everyday users, you can assign a security template to multiple users in a single step.

1. On the EMS menu bar, click Configuration > Everyday User Applications > Everyday User Security Templates. The Everyday User Security Templates window opens. The window lists security templates that have been defined for your implementation. The "(unauthenticated user)" template is reserved for guest users.

2. Select a security template other than "(unauthenticated user)" to assign to one or multiple users, and then click the Assign button. The Assign Security Template window opens, first prompting you to filter everyday users by status.

3. Select the user status and then click Next. The Assign Security Template window updates to list users to whom you can assign the security template.

4. Narrow the selection of users you wish to assign to the template using either of the following methods:

» To assign the selected security template to all the users you picked in Step 3, click the Apply to All Everyday Users checkbox.

» To assign the security template to only a few of the users you picked in Step 3, search for them in the Find field (using the other fields in this area to

narrow your search), and click Display. The users who meet your search criteria are displayed in the Available list.

5. On the Available list, select the user (CTRL-click to select multiple users) to whom you are assigning the template, and then Move (>) to the Selected list.
6. Click Finish. A message confirms that the template was assigned successfully.
7. Click OK to close the message and return to the Everyday User Security Templates window.

Configure EMS Web App Menus

When the EMS Web App is first installed, the main menu has a layout that determines the following:

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

You can add customized menu items to the existing list of system menus. These custom items can be links to EMS Web App pages or to websites outside EMS Web App.

1. On the EMS menu bar, click Configuration > Everyday User Applications > Web App Menus. The Web App Menus window opens. This window lists all the current parent menu items and child options in alpha-

betical order. Buttons to the right enable you to create new menus, change existing ones, delete, and print.

2. To configure a new menu, click New. The Web App Menu dialog box opens. The Web App Menu tab is the active tab.

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

FIELD	DESCRIPTION
Menu Text	The text for the item as it is to appear on the EMS

FIELD	DESCRIPTION
	Web App menu.
Sequence	A number that indicates the order in which this menu option is to appear relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Link	The URL or web address for the menu (for example, www.myorganization.com).
Parent Menu	The primary menu under which this new menu item is

FIELD	DESCRIPTION
	found.
New Window	Select this option if this new menu item should open in a new browser window or tab (with EMS Web App remaining open behind the new window or tab.
Authenticated Users Only	Select this option if access to this new menu item is restricted to only those users who have logged in to EMS Web App.

4. If translations have been defined for web templates (see Configuring Language Translations), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the menu item.
5. Click OK. The Web App Menu dialog box closes and returns you to the Web App Menus window with the newly configured menu option displayed in the window.

Note: If you have EMS Web App open, you might have to log out and then log back in to see the new menu item.

Configure Help Text

Since the EMS Desktop Client is the "backbone" for all editions of EMS, such as EMS Web App and EMS Kiosk, it enables you to customize the text that appears to users of those applications in your organization. This help text displays on various pages in EMS Web App, EMS Kiosk, EMS for Outlook, EMS Campus Planning Interface, and the EMS Floorplan Utility. As the EMS administrator, you can configure this help text in EMS, or if you are assigned to an appropriate everyday user security template (which has administrator access), you can configure it directly in EMS Web App.

> Tip: Depending on your organization, configuration in the EMS Desktop Client may need to be performed by a different type of System Administrator than configuration and text customization in the EMS Web App.

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

» Configure Help Text in the EMS Desktop Client
» Configuring Help Text in the EMS Web App
  » Enable the Custom Help Text Feature
  » Navigate to Pages in EMS Web App and Customize Help Text

CONFIGURE HELP TEXT IN THE EMS DESKTOP CLIENT

Follow the instructions below to enable custom help text for the EMS Web App and/or the EMS Kiosk App.

1. On the EMS menu bar, click Configuration > Everyday User Applications > Help Text. The Help Text window opens. This window lists the name or description for all types of Help Text that is currently in use in your EMS Web App and EMS Kiosk installations and the EMS Web App or EMS Kiosk page on which it appears. To filter for only a specific type of help text, select a type on the Type dropdown list.

Tip: You can view all help text including the text not in use: select Obsolete. Obsolete Help Text is displayed in red and italics in the Help Text window.

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

3. Configure the needed help text.

» Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the help text.

» Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the help text.

4. If translations have been defined for everyday user templates (see Configuring Language Translations), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the Help Text item.
5. Click OK. The Help Text dialog box closes. You return to the Help Text window with the newly configured Help Text item automatically selected in the window.

CONFIGURING HELP TEXT IN THE EMS WEB APP

Once Help Text customization is enabled in the EMS Desktop Client, System Administrators in the EMS Web App can follow the instructions below to customize the applications help text. First, you enable the feature, then you navigate to each page in EMS Web App that you wish to customize and enter help text.

ENABLE THE CUSTOM HELP TEXT FEATURE

1. Log in to EMS Web App.

2. In the dropdown menu next to your name, click Admin Functions.

3. The EMS Web App Admin Function page opens.

4. Click Enable Help Text Edit. A confirmation message appears indicating that Help Text Mode is now enabled.

NAVIGATE TO PAGES IN EMS WEB APP AND CUSTOMIZE HELP TEXT

1. Navigate to the EMS Web App page where you wish to customize Help text. The Edit option is available in the upper right corner of the page.

2. Click the option. An edit window launches where you can customize the Help text (click Edit to enter your custom help text).

3. If your help text should appear in another language, select a language option in the dropdown.

> Tip: For options in the Language dropdown are controlled by another Administrator setting, see Language Translations.

4. After entering and configuring the Help text, click Save Changes to apply the text to the selected page.

Configure Web Text

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

This topic will include information on:

» Configure Web Text in EMS Desktop Client:
» Configure Help Text in the EMS Web App

CONFIGURE WEB TEXT IN EMS DESKTOP CLIENT:

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

installations and the EMS Web App or EMS Kiosk page on which it appears.

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

Web Text Window

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

» Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the web text.

» Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the web text.

4. If translations have been defined for web templates (See Configuring Web Cultures), then open the Translations tab, and for each translation, click in the Text field, and enter the appropriate translation for the web text item.
5. Click OK. The Web Text dialog box closes. You return to the Web Text window with the newly configured web text item automatically selected in the window.

Configure Language Translations

> Note: New! Previous versions of EMS referred to this feature as "Web Cultures."

If you need to add language translation capability for your Everyday User templates or EMS Kiosk pages (menu text, menu items, and help text items), then you must configure language translations.
Each translation you configure represents a language for which translations must be provided in your EMS Everyday User Applications.

This topic will provide you with the following information:

- Build Your Language Translation Spreadsheet
- Configure Your Language Translations in EMS Desktop Client

BUILD YOUR LANGUAGE TRANSLATION SPREADSHEET

1. EMS Software provides a Microsoft® Excel spreadsheet specific to EMS Web App that contains all of the application labels, page titles, system messages and error messages with their English translations.

> Note: Values for data items (e.g. Event Types like “Meeting”, “Training”, etc. or Room Types like “Workspace”, “Conference Room”, etc.) configured within EMS or dynamic information that is inputted by an EMS user or Virtual EMS web user (e.g. Event Name like “HR Meeting”, Comments, Special Instructions, etc.) are not translated.

2. The customer is responsible for providing the translated values for the information in the product spreadsheet. Once the customer returns the fully translated product spreadsheet to EMS Software, EMS Software development teams compile the spreadsheet into a product-specific language folder containing a set of files. (We maintain a language folder for each language).

3. The customer saves the language files in the "App_GlobalResources" folder within the EMS Web App physical directory on their web server. (The default path is C:\inetpub\wwwroot\emswebapp\App_GlobalResources\).

> Important: For the translation to affect an Everyday Applications user, two conditions should be met:

- The language setting should be set in Windows
- The end user's browser Language Preference is set to that specific language and set as the default.

Example of a Successful Installation

Name	Date modified	Type
Errors.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
Errors.resx	11/28/2016 10:45 ...	.NET Managed Re
Messages.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
Messages.resx	11/28/2016 10:45 ...	.NET Managed Re
PageTitles.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
PageTitles.resx	11/28/2016 10:45 ...	.NET Managed Re
resources.Errors.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.Messages.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.PageTitles.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
resources.ScreenText.fr-CA.resources	1/25/2017 12:45 PM	RESOURCES File
ScreenText.fr-CA.resx	1/25/2017 12:45 PM	.NET Managed Re
ScreenText.resx	11/28/2016 12:52 ...	.NET Managed Re

French-Canadian Example

CONFIGURE YOUR LANGUAGE TRANSLATIONS IN EMS DESKTOP CLIENT

1. On the EMS Desktop Client menu bar, click Configuration > Everyday User Applications > Language Translations. The Language Translations window

opens, listing all the translations that are currently configured in your EMS database.

2. Click New. The Language Translation dialog box opens. By default, the language is set to English (United States).

3. In the Description field, enter a name or description for the new web culture (up to 50 characters, including spaces).
4. On the Language dropdown list, select the language into which the menu text, menu items, and help text items will be translated.
5. Click OK. The Language Translation dialog box closes, returning you to the Language Translations window with the newly configured

translations automatically selected. After you configure a language translation, it is displayed on the Translations tab in various configuration areas in EMS.

Configure Confirmation Behavior for Everyday User Applications

When working with Everyday User Process Templates, you can set automated confirmations that generate when Everyday Users initiate reservations or bookings with specific templates. For example, you may want Everyday Users to always receive an email to confirm that a request for a room has been received and will be processed.

1. To customize the behavior of this type of confirmation, from the Everyday User Process Templates window, select the template for which you wish to customize a confirmation.
2. Click Confirmation.

3. The Confirmation Settings window appears for this template. Click through the tabs specifying your Confirmation Settings.

4. Use the Options tab to set an email header and email footer for pre-configured messages (which you set under Configuration > Other > Messages).

5. Use the Web App Options tab to specify if and where a URL to the Web App should be included in the confirmation. You can also include a Message to include with the URL in the confirmation. (See Also: Configuring Confirmation Emails).

OPTION	DESCRIPTION
Display Web App Link	Indicate whether a URL to the Web App will display in the confirmation as a Header, Footer, or at all.
Web App Link Message	Indicate which Message, if any, to include with the URL to the Web App in the confirmation.

Note: To see how the Desktop Client user encounters these confirmations, see: Confirmations.

Create Templates for Desks and Workspaces

To booking templates for "hoteling" (desks and workspaces), you will:

- Configuration > Facilities
- Configure Everyday User Process Templates
- Assign Templates to Everyday Users

1. To begin configuring facilities for your organization, configure the following elements of space as needed:

- Configure Setup Types
- Configuring Rooms
- Configure Room Types
- Configure Areas
- Configure Public Views
- Configuring Features

> Tip: Consider using a naming convention or Configure Areasthat groups workspaces and desks together in lists so they are easier to find during the configuration and booking processes.

2. Once you have set up space, you can establish special booking templates for hoteling. Follow the workflow for building an Everyday User template. An example of this setup screen is shown here:

Enable Self Serve Mode so workspace bookings do not require approval (1)

Enable for new users to minimize setup later (2)

These Statuses are only available for Self Serve bookings. Example settings are show here for a workspace template. (3)

Book a Workspace

Process Template | Booking Rules | Defaults | Rooms | Outlook Conflict - Email Options | Categories | Event Types

Description: Book a Workspace

Mode: Self Serve

Menu Text: Book a desk or space to work for hoteling

Available To New Users: ☑

Reserve Status: Confirmed

Request Status: Confirmed

Conflict Status: Conflict

Cancel Status: Cancelled

Rule Violation Status:

Default Setup Type: Custom (record in setup notes)

Menu Sequence: 0

Video Conference: ☐

Everyday User Application Settings

Enable for Web App: ☑

Enable for Mobile: ☑

Enable for Outlook: ☑

Enable Integration to Microsoft Exchange: ☑

See Also: Everyday User Process Template Field Definitions.

3. Enable the template for your users in the Everyday User Application Settings section:

- Select Enable for Web App to enable the template on EMS Web App.
- Select Enable for Mobile to enable the template for both the EMS Mobile App and the mobile version of EMS Web App.
- Select Enable for Outlook to enable the template for the optional EMS for Outlook add-in, which can override booking rules such that users can book a room that is in conflict. For this situation, you can also configure a system-generated email to be sent to the user if any rooms are not available for dates booked. An additional tab becomes available if you create a template with the option enabled, Outlook Conflict Email.
- Select Enable Integration to Microsoft Exchange to enable the template for Microsoft® Exchange when your organization does not use EMS for Outlook.

4. Browse through additional tabs as needed on the template configuration page to add further customizations, such as Booking Rules, Defaults, Rooms, and Event Types. Then click OK to save your new template. Authorized users will see this option when they begin the booking process.

Everyday User Process Template Field Definitions

This topic provides information on the following:

- Process Template Tab
- Additional Tabs for Booking Template Configuration
  - Booking Rules Tab
    - Booking Rules Tab: Booking Requirements Area
    - Booking Rules Tab: Booking Days Area
- Defaults Tab
- Video Conference Tab
- Rooms Tab
- Categories Tab
- Event Types Tab
- LDAP Groups Tab
- User Defined Fields Tab
- Parameters Tab

» Help Text Tab
» Menu Text Translations Tab
» Terms and Conditions Tab

PROCESS TEMPLATE TAB

FIELD	DESCRIPTION
Description	Read-only information.
Mode	Determines how a user can make a reservation in EMS Web App. **Request** - users can complete a simple online form requesting a room. Unlike the Self Serve mode, this mode does not allow the user to view real-time room availability. In addition, requests must be reviewed, approved, and manually processed into actual reservations by an EMS Desktop Client user. The room does not show as Reserved until this step has occurred. Note: The "Request" mode is only for guest users. If you are upgrading to EMS V44 from an older version, any roles that were defined in

FIELD	DESCRIPTION
	Request mode will be set to inactive. **Self Serve** - Registered users can see real-time room availability (in list or grid views). Note: If users require video conferencing, you must choose this option. **Service Only Request** - Allows users to request a service (for example, catering, A/V equipment, and so on) for a location that is not managed in EMS.
Menu Text	The menu text or link that a EMS Web App user sees when requesting a room using this everyday user process template.

FIELD	DESCRIPTION
Available to New Users	Select this option if this everyday user process template is to be automatically assigned to newly registered users.
Reserve Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'reservable' on the Rooms tab.
Request Status	Available only for Self Serve mode. The default status that is applied to reservations that are booked in rooms identified as 'requestable' on the Rooms tab.
Conflict Status	Available only for Self Serve mode. The default status that is applied to bookings made by users attached to this template that result in a conflict (the room is already booked).

FIELD	DESCRIPTION
Cancel Status	Available only for Self Serve mode. The default status that is applied to bookings that are canceled by users who are attached to this template.
Rule Violation Status	Enabled only if Outlook is selected. Used in conjunction with the EMS for Outlook module. If you carry out an action in the EMS for Outlook module that violates a booking restriction, then the booking is changed to this status.
Default Setup Type	The setup type that is selected by default for a room search when a user who is attached to this template is reserving a room in EMS Web App. The user can always select a different value.
Allow user Personalization	Select this option if users must be able to use the Options feature to customize their settings on EMS

FIELD	DESCRIPTION
	Web App pages.
Menu Sequence	Enter a number that indicates the order in which this menu option is relative to other menu items that fall under the same parent menu. Items are ordered from lowest to highest sequence number, with the item with the lowest sequence number appearing first. Note: If you leave the sequence set to the default value of zero for all menu items, then by default, the items are displayed alphabetically.
Video Conference	Select this option if the users who are attached to this template must be able to request rooms that have a video conferencing feature.

FIELD	DESCRIPTION
	Note: This option is available only for EMS Enterprise. It is not available for EMS Professional. To use the Video Conference option correctly with a everyday user process template, the Self Serve Mode must be selected for the template.
Enable for Web App	Select this option if this process template should be available on EMS Web App.
Enable for Mobile	Select this option if this everyday user process template is to be available (in an appropriate format) on a mobile device browser.
Enable for Outlook	Enables the everyday user process template for use with the EMS for Outlook module.

FIELD	DESCRIPTION
Enable Integration to Microsoft Exchange	Enables the integration of templates with your organization's Exchange server (typically, when your organization does not use EMS for Outlook. Enabled only if your organization has purchased the optional Integration to Exchange module. Select this option if users who are attached to this template must be able to see the free/busy schedules of the attendees. The user can choose a date and time that is convenient for all attendees and then send invitations through EMS Web App, which attendees receive and can manage through Outlook.

ADDITIONAL TABS FOR BOOKING TEMPLATE CONFIGURATION

This section provides a conceptual overview of the additional tabs on the Booking Template Configuration page.

BOOKING RULES TAB

You can use the Booking Rules tab to control very specific timing on how users can book, cancel, or end events.

The Booking Rules tab contains two areas:

- Booking Requirements Area
- Booking Days Area

Booking Rules Tab

Book a Meeting Room

Process Template | Booking Rules | Defaults | Rooms | Categories | Event Types | LDAP Groups | User Defined Fields | Parameters | Help Text

Booking Requirements

Max No. Bookings Allowed per Reservation: 300

Max No. Minutes Allowed: 0 (0 = Unlimited)

Use Cancellation Cutoff Time: ☐ Cutoff Time: Number of Days: 1

Cancellation Cutoff Hours: 0

Cancel Booking In Progress: ☐

Cancel Booking In Progress Status: (none)

End Booking In Progress: ☐

Bookings Days

Range of Days

Only Allow New Bookings Within Range of This Many Days: 365

Max No. Bookings Per Day: 0 (0 = Unlimited)

Max No. Bookings Per Date Range: 0 (0 = Unlimited)

Range of Days

Only Allow New Bookings On/After This Date:

Use New Booking Cutoff Time: ☐ Cutoff Time: Number of Days: 1

New Booking Cutoff Hours: 0

OK | Cancel

BOOKING RULES TAB: BOOKING REQUIREMENTS AREA

FIELD	DESCRIPTION
Max. No. Bookings Allowed Per Reservation	Maximum number of bookings that a new reservation can contain.
Max. No. Minutes Allowed	Maximum number of minutes for which a new reservation can be created (not enforced when a user edits a booking).
Use Cancellation Cutoff Time	Whether the booking has a cutoff when cancellations can no longer be made. **Cutoff Time** and **Number of Days** control how far in advance the cutoff is set. For example, if you enter 3 p.m. and one day, then cancellation must take place before 3 p.m. on the day before the

FIELD	DESCRIPTION
	event.
Cancellation Cutoff Hours	The number of hours before an event when cancellations can be made. For example, if you enter 24, then bookings cannot be canceled less than 24 hours before they are to take place, regardless of the time of day. If using this setting, clear the Use Cancellation Cutoff Time field.
Cancel Booking in Progress	Allows users to cancel events in progress. If selected, the **Cancel Booking in Progress Status** option is enabled. Use this field to specify a status to display on this type of cancellation (configured separately). See Configure Statuses.
Cancel Booking in	Sets the status for bookings that are canceled when in progress.

FIELD	DESCRIPTION
Progress Status	
End Booking in Progress	Allows users to end in-progress bookings early, which makes the space available to other users.

BOOKING RULES TAB: BOOKING DAYS AREA

You can use the Booking Days area to indicate how far into the future bookings can be made and how much lead time is required to make a booking.

Fields change depending on your initial **selections in Range of Days** and **Specific Date**. The second dropdown menu sets the lead time requirement and you must select a date in the **Only Allow New Bookings After This Date** field.

FIELD	DESCRIPTION
Specific Date	If you select **Specific Date**, then you must specify a value for **Only Allow New Bookings Prior to This Date** to dictate the future range. **Only allow new bookings within Range of this Many Days** - Set a date in this field if you want bookings to only be allowed after this date. **Use New Booking Cutoff Time** - Enter the cutoff time and number of days at which point you wish to require the Everyday User to submit bookings by that time and number of days. **New Booking Cutoff Hours** - Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.

FIELD	DESCRIPTION
Range of Days	Selecting this option from the first dropdown means the user will only be allowed to make bookings within a range of days. You must also specify a value for **Only Allow New Bookings within Range of This Many Days**, and you must also indicate a cutoff time or cutoff hours as you did for cancellations
	Only allow new bookings within Range of this Many Days - Set a number in this field to allow bookings within the number of the days specified (e.g.: 365 would allow an everyday user to create bookings within 365 days).
	Max No. Bookings Per Day - Number of bookings allowed within 24-hour period.
	Max No. Bookings Per Date Range - Number of bookings allowed within Range of Days.

FIELD	DESCRIPTION
	New Booking Cutoff Hours - Enter a value in this field if you want new bookings to only be accepted after the number of hours indicated.

DEFAULTS TAB

You can use this tab to set the default values for Event Type, Event Name, Building, Event Time Start/End, and Time Zone to automatically populate the Room Requests page when users make reservations; users can edit them as needed.

Event Type and Building values are pre-configured.

See Also: Configure Event Types, Configure Buildings, and Set Default Start and End Times.

VIDEO CONFERENCE TAB

You can use this tab to control how users can make video conferencing reservations. This tab is available only in EMS Enterprise and only if the Video Conference option was selected on the everyday template tab. For information on how to configure the information on this tab correctly so that assigned users make video conferencing reservations, see Video Conferencing.

ROOMS TAB

This tab enables you to associate the everyday template with specific space. To begin, specify Building (all buildings, a specific building, an area, or a view) and Room Type search criteria. These are pre-configured.

See Also:

- Configuring Buildings
- Configuring Areas

- Configuring Public Views
- Configuring Rooms and Configuring Room Types

You can move one or more rooms (CTRL-click) from the Available list to the Request or Reserve panes for this template. This controls the space that users assigned to this everyday template can book.

- Reserve pane: rooms that can be reserved without approval (booked in the Reserve Status on the everyday template tab).
- Request pane: rooms that require approval (booked in the Request Status on the everyday template tab).

CATEGORIES TAB

This tab enables you to set the pre-configured categories of services that users assigned to the template can add to their bookings by moving them from the Available list to the Selected list. These are pre-configured. See Configuring Categories.

Tip: If your Administrator has configured an "Attendee" type category, and assigned it to the booking template, users can invite or remove attendees on the Services page.

EVENT TYPES TAB

This tab enables you to set which event types users of this template can choose from during the booking process by moving them from the Available list to the Selected list, or to the Available To All everyday process Templates list.

LDAP GROUPS TAB

You use this tab to assign Everyday User process templates to users based on LDAP Groups that are defined in your directory service, for example, Active Directory. Everyday user process templates that are assigned via LDAP do not need to be explicitly assigned to user records. When users log in, they “inherit” the everyday user process templates based on the LDAP groups to which they belong. To assign the one

or more LDAP group, select and move them from the Available list to the Selected list. See Also: LDAP Authentication.

USER DEFINED FIELDS TAB

You can use this tab to control the behavior of your implementation's customized fields for this template by moving one or more from the Available pane to the Required or Optional panes. These fields are preconfigured. See Also: Configuring User Defined Fields (UDFs).

PARAMETERS TAB

This tab enables you to control how this everyday user process template is affected by parameter settings.

- To edit the value for a parameter, select the parameter, and then click **Edit**.
- To reset the value for a parameter to its default global value, select the parameter, and then click **Use Global**.

Note: The billing parameter, Billing Reference Validation, includes a special option that affects whether users are prompted to enter billing and PO information and whether they are validated.

Users will see the Billing Reference field during the booking process parameters are set at either the reservation, room, or category level. Whether the Billing Reference field displays is based on four settings: global, template, room-level setting, category-level setting. The booking template setting overrides the global setting. The room and category level settings can both override the template setting. After the Admin decides whether

to display the field, user entries will be validated based on the value in the "Billing Reference Validation" parameter set (above) on the template.

Billing Reference field options:

- Show (Prompt)
- Require
- Validate (Show and Require)
- Don't Show

Additionally, the Billing Reference Validation parameter will always determine whether it is optional, required, or required and validated.

See Also:

- Configuring Rooms
- Configuring Categories
- Configuring Field Behavior for Billing Reference and PO Numbers

HELP TEXT TAB

This tab enables you to control the help text that displays to users when they are using this template. By default, help text items inherit their settings from the global Help Text list. (See Configuring Help Text.) You can use the list of help text items on the Help Text tab to override the settings for this particular template if needed.

- To edit the value for a help text item, select the item, and then click **Edit**.
- To reset the value for an item to its default global value, select the item, and then click Use **Global**.

MENU TEXT TRANSLATIONS TAB

This tab enables you to control how your EMS Web App translations appear to users of this template.You only need to provide information on this tab if a foreign language translation has been defined for everyday templates. See Configuring Language Translations. For each translation shown here, you can click in the **Text** field and enter the appropriate translation for the menu text (the menu text or link that an EMS Web App

user sees when requesting a room using this everyday user process template).

TERMS AND CONDITIONS TAB

You can use this tab to set your template to require that its users agree to special Terms and Conditions before submitting reservations. In the text area, you can create a Terms and Conditions message that presents when a user selects a room.

- Design (selected by default) means you use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on).
- HTML means you use HTML code to format the message (spacing, number of lines, capitalization, and so on) to format your Terms and Conditions.

How Do I Allow Invitations on a Booking Template?

1. Configure booking templates.
2. Everyday User Process Template Field Definitionscheckbox.

Configuration > Kiosk

The EMS Kiosk is a powerful yet easy-to-use digital room sign and interactive tool for reviewing room availability, booking space, searching for a meeting location and more. Mount the unit outside a room and/or make an EMS Kiosk available in a lobby or entryway.

This section guides you in configuring elements for EMS "Everyday User" applications, under Configuration > Kiosk.

Configure EMS Kiosk App Profiles

When you configure the EMS Kiosk App on a specific touch-screen device, a Kiosk profile controls the functionality that will be available on the device. You configure an EMS Kiosk profile through the EMS Desktop Client.

You can set parameters and default language translations and floor plans at the Global level (these set defaults for all Profiles) or for just one Kiosk Profile (on the tabs below). This topic guides you in configuring one Kiosk Profile.

To configure an EMS Kiosk Profile, you will:

- Navigate to the Kiosk Profiles Area.
- Kiosk Profile Tab.
- Configure how Rooms Tab, Menu Items Tab, Translations Tab, Images Tab,

and Help Text Tab display on Kiosks that have this profile.

» Parameters Tab (as needed) for this profile.

NAVIGATE TO THE KIOSK PROFILES AREA

1. From the EMS Desktop Client menu bar, click **Configuration** > **Kiosk** > **Kiosk Profiles**. The Kiosk Profiles window opens, listing all active Kiosk Profiles.

   Kiosk Profile Window

2. Click **New**. The Kiosk Profile dialog box opens. The **Kiosk Profile** tab is the active tab.

Kiosk Profile

3. Enter the information for the new profile on the **Kiosk Profile** tab.

KIOSK PROFILE TAB

Fields on the **Kiosk Profile** tab are described below.

OPTION	DESCRIPTION
Description	The name or description for the Kiosk profile (maximum of 50 characters, including spaces).
Building Floor Area	Select the default building, and floor, for the current day's events. The area is used to define the scope of the event display on the Today's Events page. EMS Kiosk App users will be able to see events across all the buildings that are included in the selected area. Note: Building is a required value.
Default Translation	A translation is the language in which the menu items, menu text, and Help Text are displayed on a Kiosk page. If you leave this field set to "(default)", then this Kiosk Profile will inherit the language setting in EMS Kiosk global parameters (and if these are not specified, the default language is US English). In order to set a default

OPTION	DESCRIPTION
	language for this Kiosk Profile, you will need to first add one or more languages on the Translations Tab; then you can select a language on this dropdown to be the language in which the Kiosk automatically displays. If you add multiple languages on the **Translations** tab for users to choose from, your selection in this field sets the default to display unless they choose another language. Note: If the language you want is not available in this dropdown field, then the translation must be defined globally for EMS Desktop Client (see Configure Language Translations). Global parameters can be accessed under **System Administration** > **Settings** > **System Parameters**. Additionally, in order to make alternate languages available on your kiosks, you must Tip: If translations have been defined for your implementation and you wish to make them available on kiosks, enable the Language Selection option. for EMS Kiosk App.

OPTION	DESCRIPTION
Default Floor Plan	Select the default floor plan that is to be displayed for the current day's events in the selected **Building** (above). Note: This is an add-on feature that is only available if floor plans have been configured using the optional EMS Floor Plans utility.
Inactive	Leave this option blank to keep the profile active. Select this option to inactivate the profile.

Continue with any other configuration tabs (below) for the profile as needed:

- Rooms Tab
- Menu Items Tab
- Translations Tab
- Images Tab

- Parameters Tab
- Help Text Tab

Tip: On any tabs in this configuration, you can click **OK** to save your changes and close the Kiosk Profile dialog box. Your newly configured profile will then be listed in the list of Kiosk Profiles.

ROOMS TAB

Rooms selected in the **Rooms** tab will appear under Today's Events, and users can reserve them from the Make Reservations page.

Rooms Tab

1. On the Building dropdown list, select the applicable building.
2. On the Room Type dropdown list, leave the default value of (all), or select the appropriate room type. The Available list displays all the rooms that meet your search criteria.
3. On the Available list, select the room, or CTRL-click to select the multiple rooms that a user can book from the Make Reservation page, and then click the **Move** (**>**) button to move the selected rooms to the Selected list.

MENU ITEMS TAB

You use the **Menu Items** tab to select the menu items that are to be available to the users of EMS Kiosk App. Menus are displayed as buttons at the top of EMS Kiosk App pages.

1. On the Available list, select the menu item, or CTRL-click to select the multiple menu items that are to be available to an EMS Kiosk user.
2. Click the **Move** (**>**) button to move the selected items to the Selected list.
3. Click **OK**.

Menu Items Tab

TRANSLATIONS TAB

A translation is the language in which the menu items, menu text, and Help Text are displayed on a Kiosk page. If you select one or more languages here, then this Kiosk Profile will inherit the language setting in EMS Kiosk global parameters (and if these are not specified, the default language is US English). If you add multiple languages here for users to

choose from, you can set a language as the default to display on the kiosk unless they choose another language on the Kiosk Profile Tab.

Tip: If the language you want is not available in this dropdown field, then the translation must be defined globally for EMS Desktop Client (see Configure Language Translations). Global parameters can be accessed under **System Administration** > **Settings** > **System Parameters**. Additionally, in order to make alternate languages available on your kiosks, you must Tip: If translations have been defined for your implementation and you wish to make them available on kiosks, enable the Language Selection option. for EMS Kiosk App.

1. To add a translation to your Kiosk Profile, in the Available list, select the language (or CTRL-click to select the multiple languages to be available on the Kiosk).
2. Click the **Move** (**>**) button to move the selected items to the Selected list.
3. Click **OK**.

Translations Tab

IMAGES TAB

Use the **Images** tab to select the images (map of area, image of building, and so on) that show in the Information area of EMS Kiosk.

Images Tab

1. Click **New** to open the Find Image dialog box, and then browse to and select the image to be displayed in the Images area of EMS Kiosk App. The Find Image dialog box closes. You remain on the **Images** tab with an entry for the image displayed on the tab. The image must be in one of the following formats–.gif, .jpeg, .jpg, .bmp, .wmf, or .png.

2. Optionally, do one or both of the following:
   - Edit the description for the image.
   - In the Web Long Description field, enter a description of the image. The value that you enter here defines the “long desc” attribute for web content accessibility.

3. Continue with any other configuration for the profile as needed; otherwise, click **OK** to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

PARAMETERS TAB

Concept: You can set *global* parameters to affect all Kiosk Profiles, or you can set parameters for a single Kiosk Profile.

Tip: Click the **Use Global** button to inherit settings from Global parameters.

The parameters on this tab are grouped based on the functional areas that they affect. You can click **Edit** to change the parameter settings as needed on this tab.

Important: There are certain parameters that no longer impact the current version of the EMS Kiosk App (release in Fall of 2017). They will still be visible to Administrators because these parameters are being utilized by previous versions of the EMS Kiosk (Legacy). See the table below for more information regarding these parameters.

Parameters Tab

Area	Description	Source	Value
Floor Plans	Floor Plan Web Service URL	Global	http://localhost/Floor
Make Reservation	Conflict Status for New Reservation	Global	(none)
Make Reservation	Default End Time for New Reservation	Global	5:00 pm
Make Reservation	Default Event Name for New Reservation	Global	Meeting - %USER%
Make Reservation	Default Search = Floor Map on Make Reservation	Global	No
Make Reservation	Default Start Time for New Reservation	Global	8:00 am
Make Reservation	Display Start/End Time Drop Downs	Global	Yes
Make Reservation	Enable Web Process Template Security	Global	No
Make Reservation	Event Type for New Reservation	Global	(none)
Make Reservation	Number of Future Concurrent Days Allowed for New Reservation	Global	0
Make Reservation	Reservation Source for New Reservation	Global	(not specified)
Make Reservation	Start Date Allowed for New Reservation (days)	Global	0
Make Reservation	Status for New Reservation	Global	(none)
Make Reservation	Time Drop Down Increment	Global	30
Miscellaneous	Browser Title	Global	EMS Kiosk
Miscellaneous	Default Page	Global	Today's Events

PARAMETERS NO LONGER USED BY CURRENT VERSION OF THE EMS KIOSK APP

PARAMETER AREA	DESCRIPTION
Miscellaneous / Browser Title	The redesigned EMS Kiosk App no longer displays a browser title.
Miscellaneous / Display Cancel Button for Group Searches	This parameter is not used in the new design.
Make a Reservation / Time Drop Down Increment	The new design simplifies choosing a start/end time for your reservations. Therefore, Administrators do not have to worry about the time increment.
Security / Require	Logoff behavior has been changed in the

PARAMETER AREA	DESCRIPTION
Timeout/Logoff to Terminate User Session	redesigned EMS Kiosk App; therefore, this parameter is no longer utilized. The Miscellaneous / Page Timeout (seconds) parameter alone governs timeout behavior in the redesigned EMS Kiosk App. If the value set in this parameter passes with no activity, users will see a message on the screen asking them to press continue or they will be logged off.
Security / Show 10 Key As Modal	In the redesigned EMS Kiosk App, the 10-key keyboard does not appear as a modal. Therefore, this parameter is ignored in the redesigned version.
Floor Plan / Floor Plan Web Service URL	The Floor Plan URL is now provided by the EMS Platform Services and does not have to be set separately in the EMS Kiosk App. This para-

PARAMETER AREA	DESCRIPTION
	meter will thus be ignored.
Log Off (Menu Items tab)	User logoff is handled differently in the redesigned EMS Kiosk App, which eliminates the need for a distinct 'Log Off' button. This menu item will thus be ignored.
Default Page (Menu Items tab)	The 'Default Page' is a way to configure the home screen. However, it is not a specific button that a user can press. Thus, this option will not apply to the redesigned EMS Kiosk App.

HELP TEXT TAB

Help Text is custom help text or policies and procedures that are specific to your organization that is displayed on various pages in EMS Web App and EMS Kiosk. Help Text is defined at the global level under

Configurations > **Everyday User Applications** > **Help Text**. (See Configure Help Text.) You use the **Help Text** tab to override the global setting for a help text and customize the help text for a specific Kiosk Profile.

Help Text Tab

1. Select the Help Text that you are customizing, and then click **Edit**. The Help Text dialog box opens. The **Help Text** tab is the active tab. The tab contains options for entering and configuring the Help Text.
   - Design is selected by default. Use the standard Windows plain text formatting options to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.
   - Select HTML and enter the necessary HTML code to format the message (spacing, number of lines, capitalization, and so on) so that it is displayed the way that you want in the headers and footers.

Selecting Design in the Help Text Tab

2. If Help Text translations have been defined for web templates or kiosk pages (see Configure Language Translations for Everyday User Applications), then open the **Translations** tab, and for each translation, click in the Text field, and enter the appropriate translation for the Help Text item.
3. Click **OK**. The Help Text dialog box closes. You return to the **Help Text** tab with the newly configured Help Text item automatically selected in the tab.

4. Continue with any other configuration for the profile as needed; otherwise, click **OK** to close the Kiosk Profile dialog box and return to the Kiosk Profiles window. The newly configured profile is displayed in the window.

Configure EMS Kiosk App Menus

EMS Kiosk menus are displayed as buttons at the top of EMS Kiosk pages. You can customize and rename EMS Kiosk menus through the EMS Desktop Client.

1. On the EMS Desktop Client menu bar, click **Configuration** > **Kiosk** > **Kiosk Menus**. The Kiosk Menus window opens. This window lists EMS Kiosk menus; the **Description** is the text that appears on the menu button at the top of EMS Kiosk pages.

   EMS Kiosk Menus Dialog Box

Tip: If translations have been defined for your implementation and you wish to make them available on kiosks, enable the **Language Selection** option.

2. Select the menu and click **Edit**. The Kiosk Menu dialog box opens, showing the menu name and its current description. You cannot edit the menu name.

3. In the Description field, edit the description for the kiosk menu (maximum of 50 characters, including spaces).

Description in the EMS Kiosk App Menu

Tip: If translations have been defined for your implementation and you enabled the **Language Selection** option (in Step 1 above), open the **Translations** tab. For each translation, enter the appropriate description that is to be translated.

4. Click **OK**. The Kiosk Menu dialog box closes, and you return to the Kiosk Menus window with the newly configured menu automatically selected.

Configure Groups (Toolbar Icon)

> Note: Groups Are Often Re-Labeled "Employees" or "Customers"

Groups is the generic label delivered with EMS Desktop Client, and is an icon on the application toolbar. Groups can be associated with Billing and PO numbers, booking templates, and so on and greatly affect what your end users have access to during the booking process.

Configure Groups

A group is a team of users for which reservations are made at your facilities. A group can be as granular as a single person, or it can represent an entire organization or department of people (for example, an Academic Affairs group). A group is one of the four core data items that you must configure so that your users can make reservations. A group can be an internal or external entity and it can be an organization or an individual. If you want to first confirm that a group has not already been configured, you can search for the group.

This topic will provide information on the following:

- Search for a Group and/or Contact
- Configure Groups

> Tip: Your organization might use a different term (such as client, customer, and so on) to identify the entities for which reservations are

made at your facilities. To change the term from “group” to your organization-specific term throughout your EMS system (menus, window and dialog box titles, confirmation headings, and so on), you must edit the "Group Title Plural" and "Group Title Singular" parameters. See Editing System Parameters.

Additionally, if your organization has licensed EMS Human Resources Toolkit, this affects how data is imported for your users, groups, and contacts; see the HR Toolkit Installation Guide.

SEARCH FOR A GROUP AND/OR CONTACT

1. On the toolbar, click the Groups icon. The Groups window opens. The Results tab is the active tab. By default, when the Results tab first opens, it lists the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

> Tip: Optionally, to change the number of records that are displayed in the Groups window, click Options, and then on the Group Options dialog box, select a different number of records to return.

2. Open the Filter tab and set your search criteria.

OPTION	DESCRIPTION
Display	• Group—Display all groups that meet your search criteria on the Results tab. • Contact—Display all contacts that meet your search criteria on the Results tab. Note: When a list of contacts is displayed, the contact's group is also displayed.
Search Fields	• Starts with—The string is not case-sensitive, but your search is limited to the exact order of the characters in the string, and the string must begin with the information for which you are searching. For example, Assoc returns Association of Broadcasters but not Biomedical Student Association. • Contains—Your search is limited to the exact order of the

OPTION	DESCRIPTION
	characters in the string, but the string is not case-sensitive, and the string can be found anywhere in your search results. For example, Assoc returns both Association of Broadcasters and Biomedical Student Association.
Group	Fields are available if you select Groups for Display. Enter values as needed in any or all fields.
Contact	Fields are available only if you select Contacts for Display. Leave all fields set to their default search values to search for all active contacts that are currently configured in your EMS database, or enter values as needed in any or all fields. Note: If you select Contact, then both the Group fields and the Contact fields are available for searching. If you enter data in both sets of fields when you are searching for a con-

OPTION	DESCRIPTION
	tact, then your search criteria must be met for both the contact and the contact's group for the contact to be displayed on the Results tab.

Note: To reset the Filter at any time to its default settings, click Reset Filter.

3. Click Get Data. The Results tab opens with a list of search results that meet all your search criteria.
4. To further filter the display on the Results tab, in the Search field, enter a search string. The list of groups is dynamically updated as you enter your search string. 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 your search results. For example, a search string of Assoc returns both Association of Broadcasters and Biomedical Student Association.

CONFIGURE GROUPS

The following procedure describes the basic information that an EMS administrator typically configures for a group. Groups configured this way are generally a satisfactory starting point for the reservationists at your organization, and they always have the option of configuring additional information for a group if needed. For example, they can configure comments or reminders for a group. Your reservationists can also configure and/or edit a groups “on the fly” during the reservation process.

> Tip: Remember that before you configure a group, you might want to search for the group to verify that it has not already been configured.

1. On the toolbar, click the Groups icon. When the Results tab first opens, it lists up the first 1000 groups that are currently configured in your EMS database and that have a status of Active.

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

3. Enter the summary information for the new group.

> Tip: The only required information is the group name. All other information on all tabs is optional and can be added at a later date when needed.

FIELD	DESCRIPTION
Name	Required field. The name of the group. Note: The name can be a maximum of 50 characters, including spaces.
Address	The street or mailing address for the group.
City	
ST	
Country	
Zip	
International	Select this option to drop the State and Zip fields for an international group.

FIELD	DESCRIPTION
Group Type	If the appropriate group type is not available, you can configure it. See “Configuring Group Types”.
Phone Fax	The phone number and fax number for the group. Note: The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the group. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.

FIELD	DESCRIPTION
URL	The URL for the group's website. Note: Everyday Users can link to this group's web site on EMS Web App.
Default Contact	Populated with the name of the default contact for the group after you have defined default contacts for the group.
Require Contacts	Select this option if the group is to always require a contact when a reservation is being made for the group.
VIP	Select this option if the group is to be designated as a VIP group.
Available to Web Users	Select this option if users are to be able to look up the group in EMS Web App.

FIELD	DESCRIPTION
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

> Tip: The only required information is the group name. All other information on all tabs is optional and can be added at a later date when needed.

4. Optionally, do one or both of the following;.

» Open the Billing Information tab and add the default billing information for the group. The values you specify here will be used as the default values when a new reservation is made for the group. An EMS user can change these values if needed.

Concept: Entering Billing Info Here Assigns It To The Group

This means that whenever a member of this group books space, this billing info will be applied to the booking. Therefore, the best practice is to first define you Pricing Plans, Payment Types, and other billing info before defining it here for the group.

OPTION	DESCRIPTION
Pricing Plan	If the appropriate pricing plan is not available, you can configure it. See Configuring Pricing Plans.
Payment Type	If the appropriate payment type is not available, you can configure it. See Configuring Payment Types.
Salesperson	The salesperson for the event. Note: An EMS user is designated as a Salesperson at the time that the user's account is configured. If you do not see the appropriate user in the list, you can edit an existing user account, or create a new user account as needed. See Configuring User Accounts.
Event Coordinator	The event coordinator for the group. Note: An EMS user is designated as an Event Coordin-

OPTION	DESCRIPTION
	ator at the time that the user's account is configured. If you do not see the appropriate user in the list, you can edit an existing user account, or create a new user account as needed. See Configuring User Accounts.
Sales Category	If the appropriate sales category is not available, you can configure it. See Configuring Sales Categories.
Status	The status is a way to indicate the standing or ranking of the group. The default values are the following: » OK—A reservation can be made for the group. (In your organization, this status could indicate that the group is current in payments due.) » Warning—If a group status is set to Warning, then a Warning message opens when you make a reservation for the group. It does not, however, prevent a reservation

OPTION	DESCRIPTION
	from being made for the group. » Bad–If a group status is set to Bad, then reservations cannot be made for the group. Note: You can always change the default values for these group statuses. See Editing System Parameters.
Billing Reference Number	You can manually enter data into the field, or you can click the Search icon to open a master list of billing reference numbers and select a reference. Note: To define a list of eligible billing references that are specific to the group, see Configuring Additional Information for a Group.
PO Number	You can manually enter data into the field, or you can click the Search icon to open a master list of PO Numbers and select a PO number.

OPTION	DESCRIPTION
	Note: To define a list of eligible PO numbers that are specific to the group, see Configuring Additional Information for a Group.
External Reference	Links the group to an outside program, if needed.
Account	If the appropriate account is not available, you can configure it. See Configuring Accounts. Note: This field is displayed only if the EMS system parameter “Show Account Field on Group” is set to “Yes.” See EMS System Parameters.

Tip: The values that you specify here are the default values that are applied when a new reservation is made for the group. An EMS user can change these values if needed.

» Open the Other tab and add any other identifying information for the group as needed.

OPTION	DESCRIPTION
Network ID	The Windows login for the group.
Personnel Number	Organization number for the group.
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

5. Click OK. The Group dialog box closes and a group-specific window opens with the newly configured group automatically selected. You can use the options on this window to carry out additional configuration for the group. See Configuring Additional Information for a Group.

AAA Colorado
AAA Colorado
Contacts
Reminders
Comments
Attachments
User Defined Fields
Reservations
Calculations
Billing References
PO Numbers
Web Users
Summary
Billing Information
Other
Audit
Group: AAA Colorado
Address: 5656 Washington Street
City ST Zip: Denver, CO 8026
Country:
International: No
Group Type: (none)
Phone: 303-434-1313
Fax: 303-434-2323
Email Address: will.smith@aaa.co.com
URL: www.aaa.co.com
Default Contact: (none)
Require Contacts: No
VIP: No
Active: Yes
Edit
Delete
Tools
Email
Close

Configuring Additional Information for a Group

After you have configured a new group in your EMS database with the basic group information (group identifying information, billing information and/or other information), you have the option of configuring additional information for the group.

This topic will provide information that will allow you to:

- Create an Everyday User from a Group
- Assign a Group to an Everyday User
- Assign Calculations to a Group
- Configure a List of Billing Reference Numbers
- Configure a List of PO Numbers

CREATE AN EVERYDAY USER FROM A GROUP

An "Everyday User" is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. When you add a new group in your EMS database, you decide the “level” of the group that you are adding. For a group that is added at the individual (personnel/employee) level, you might also need to create an everyday user from the group. This user can then create and view reservations on behalf of a group or groups in EMS Web App. You can create only one everyday user from a group. When you create an everyday user, you can also specify one or more delegates for the everyday user. A delegate is an everyday user who can create and view reservations on behalf of another everyday user. See Also: Configuring Everyday Users.

1. Open the Groups window and search for the group for which you are creating the everyday user.

2. On the Groups window, select the group, and then click Tools > Create Everyday User. A group-specific dialog box opens. the everyday user tab is the active tab.

> Tip: The User Defined Fields tab shows the prompts an everyday user must answer when requesting an account through EMS Web App and it is not relevant to the procedure described below.

3. Enter the information for the new everyday user. You can make additional changes later.

FIELD	Description
Name	Automatically populated after you select the group from the Groups window.
Password	The password that an everyday user must enter to log in to EMS Web App.
Email address	If this information has been entered in the Groups window for the group, then this field is automatically populated after you select the group from

FIELD	Description
	the Groups window. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to EMS Web App.)
Phone/Fax	Optional fields. If this information has been entered for the group, then these fields are automatically populated after you select the group from the Groups window. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the everyday user to an outside program if needed.
Network ID	Optional field. the everyday user's network ID.
Email Opt Out	Select this option if the everyday user is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.
Status	Required field. Select the status for the everyday user:

FIELD	Description
	» Active–the everyday user can log in to EMS Web App. » Inactive–The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. » Pending–the everyday user cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security Template Required field	This determines the everyday user's access to the system–the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in EMS Web App. Note: For detailed information about web security templates, see Configuring Web Templates.
Time Zone	Required field. Select the time zone for the user.

4. Open the Everyday User Process Templates tab and on the Available list, select one or more process templates (use CTRL-click to select multiples) to which you are assigning the user, and Move (>) them to the Selected list.

> Tip: A "process template" defines the functions available to each type of everyday user in EMS Web App when they submit a request for a reservation. For detailed information about process templates, see Configuring Web Templates.

5. Open the Groups tab, where you specify the groups on whose behalf the everyday user can view and make reservations in EMS Web App. You can use the Find and Group Type fields, and then click Display to search for specific groups. In the Available list, select one or more groups and move (>) them to the Selected list. If you do not search and simply click Display, the list shows all active groups in your system.
6. Open the Delegates tab, where you specify the delegates for the everyday user. You can search for specific delegates and move (>) them to the Selected list.

> Tip: The Spelling option enables you to spell-check any information that you manually entered for the everyday user.

7. Click OK. The dialog box for creating an everyday user closes and a message opens indicating that the everyday user was created successfully.
8. Click OK to close the message and return to the Groups window.

ASSIGN A GROUP TO AN EVERYDAY USER

When you add a new group in your EMS database, you should also assign the group to an everyday user. This everyday user can then create and view reservations on behalf of the group in EMS Web App. You can assign a group to one or more everyday users.

1. Open the Groups window and search for the group to which you are assigning the everyday user.
2. On the Groups window, select the group, and then click Tools > Assign to Everyday Users. The Assign Group dialog box opens.

3. Do one of the following to select the everyday users whom you are assigning to the group:

» Leave the Find field blank, and then click Display to open a list of all currently active everyday users. Select the everyday user, or CTRL-click to select multiple everyday users, and then Move (>) to the Selected list.

» In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter a search string, and then click Display. Select the everyday user (CTRL-click to select multiple users), and then Move (>) to the Selected list.

4. Click Finish. A message opens indicating that the group was assigned successfully.

5. Click OK to close the message and return to the Groups window.

ASSIGN CALCULATIONS TO A GROUP

Calculations are additional charges that can be applied to billable items (a category, a group, a group type, a resource, or a room) such as gratuity or sales tax. When you configure a group, you can assign the calculations that are to always apply to the group.

1. Open the Groups window and search for the group to which you are assigning the calculations. See Search for a Group and/or Contact.
2. On the Groups window, select the group, and then click Open. A group-specific window opens. The group is automatically selected in the window.

3. In the left pane of the group-specific window, select Calculations. The right pane of the group-specific window displays any calculations that have already been assigned to the group.
4. Click Edit. The Calculations dialog box opens.

5. On the Available list, select the calculation (CTRL-click to select multiple calculations) that you want to always apply to this group, and then Move (>) to the Selected list.

> Tip: If the appropriate calculation is not available, you can configure it. See Configuring Calculations.

Remember, you can also assign calculations to a group type. (See Configuring Group Types.) If you have already assigned calculations for this group's type, then these calculations are automatically applied to the group. The calculations show in the Selected list after you click OK and save the group.

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Calculations dialog box and return to the group-specific window.

CONFIGURE A LIST OF BILLING REFERENCE NUMBERS

You can configure a master list of billing reference numbers that are specific to the group.

1. Open the Groups window and search for the group for which you are configuring the master billing reference numbers list.
2. On the Groups window, select the group, and then click Open. A group-specific window opens showing the group as automatically selected.

3. In the left pane of the group-specific window, select Billing References. A list of all currently active billing reference numbers for the group shows in the right pane of the group-specific window.

> Tip: You can display all billing reference numbers regardless of status by clicking Show Inactive. Any inactive billing reference numbers show in italics in the right pane.

4. Click New. The Billing Reference dialog box opens.

5. Enter the information for the new billing reference number.

OPTION	Description
Billing Reference Number	The billing reference number that is associated with the group. Note: The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

> Tip: You can click Spelling to spell-check the information for the PO number before you save it.

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the Billing Reference Number dialog box and

return to the group-specific window.

CONFIGURE A LIST OF PO NUMBERS

You can configure a master list of PO numbers that are specific to the group. That way, if you need to edit the group information, instead of having to manually enter a new or different PO number, you can simply select it from this master list.

1. Open the Groups window and search for the group for which you are configuring the master PO numbers list.
2. On the Groups window, select the group, and then click Open. A group-specific window open. The group is automatically selected in the window.
3. In the left pane of the group-specific window, select PO Numbers. A list of all currently active PO numbers for the group shows in the right pane.

> Tip: You can display all PO numbers regardless of status: click Show Inactive. Inactive PO numbers show in italics.

4. Click New. The PO Number dialog box opens.

5. Enter the information for the new PO number.

OPTION	Description
PO Number	The PO number that is associated with the group. Note: The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO num-

OPTION	Description
	ber.
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

> Tip: You can click Spelling to spell-check the information for the PO number before you save it.

6. Continue with any other optional configuration for the group as needed; otherwise, click OK to close the dialog box and return to the group-specific window.

Edit Group Information

You can edit any and all information for a group. The way that you edit the information depends on the information itself. You can edit the Summary information, the Billing information, and the Other information through the Edit function on the group-specific dialog box. You must edit the group's contacts, calculations, billing reference numbers, PO numbers, and Everyday Users on the group-specific window.

When you select a configuration item (contacts, reminders, and so on) for editing in the group-specific window, the right pane for the window is an EMS browser window. See The EMS Browser Window.

This topic will provide instructions on editing the following group information:

- Edit Summary, Billing, and/or Other Group Information
- Edit the Contacts for a Group
- Edit the Calculations for a Group
- Edit the Billing Reference Numbers for a Group

» Edit the PO Numbers for a Group

» Edit Everyday Users for a Group

EDIT GROUP INFORMATION

1. Open the Groups window and search for the group for which you are editing the information. See To search for a group and/or contact.
2. Select the group, and then click Open to open the group in the group-specific window. The group is selected by default. The Summary tab is the active tab.

Group-specific Window

EDIT SUMMARY, BILLING, AND/OR OTHER GROUP INFORMATION

1. To edit the summary information, billing information, and/or other information for the group, click Edit. The group-specific dialog box opens.
2. Open the appropriate tab, and then edit the information as needed. See Configure Groups.

Summary Information

FIELD	DESCRIPTION
Name	Required field. The name of the group. Note: The name can be a maximum of 50 characters, including spaces.
Address City ST Zip Country	The street or mailing address for the group.
International	Select this option to drop the State and Zip fields for an international group.
Phone Fax	The phone number and fax number for the group. Note: The Phone and Fax fields have a dropdown list

FIELD	DESCRIPTION
	available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the group. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
URL	The URL for the group's website. Note: Everyday Users can link to this group's web site on EMS Web App.

FIELD	DESCRIPTION
Default Contact	Populated with the name of the default contact for the group after you have defined default contacts for the group.
Require Contacts	Select this option if the group is to always require a contact when a reservation is being made for the group.
VIP	Select this option if the group is to be designated as a VIP group.
Inactive	Leave this option blank to add the group as an active group. Select this option to inactivate the group.

Billing Information

OPTION	DESCRIPTION
Pricing Plan	If the appropriate pricing plan is not available, you can configure it. See “Configuring Pricing Plans”.
Account	If the appropriate account is not available, you can configure it. See “Configuring Accounts”.
Payment Type	If the appropriate payment type is not available, you can configure it. See “Configuring Payment Types”.
Salesperson	The salesperson for the event. Note: An EMS user is designated as a Salesperson at the time that the user’s account is configured. If you do not see the appropriate user in the list, you can modify an existing user account, or create a new user account as needed. See Configure Users.

OPTION	DESCRIPTION
Event Coordinator	The event coordinator for the group. Note: An EMS user is designated as an Event Coordinator at the time that the user's account is configured. If you do not see the appropriate user in the list, you can modify an existing user account, or create a new user account as needed. See Configure Users.
Sales Category	If the appropriate sales category is not available, you can configure it. See Configure Sales Categories.
Status	The status is a way to indicate the standing or ranking of the group. The default values are the following: » OK—A reservation can be made for the group. (In your organization, this status could indicate that the group is current in payments due.)

OPTION	DESCRIPTION
	» Warning–If a group status is set to Warning, then a Warning message opens when you make a reservation for the group. It does not, however, prevent a reservation from being made for the group. » Bad–If a group status is set to Bad, then reservations cannot be made for the group. Note: You can always change the default values for these group statuses. See Edit System Parameters.
Billing Reference Number	You can manually enter data into the field, or you can click the Search icon to open a master list of billing reference numbers and select a reference. Note: To define a list of eligible billing references that are specific to the group, see Configuring Additional Information for a Group.

OPTION	DESCRIPTION
PO Number	You can manually enter data into the field, or you can click the Search icon to open a master list of PO Numbers and select a PO number. Note: To define a list of eligible PO numbers that are specific to the group, see Configuring Additional Information for a Group.
External Reference	Links the group to an outside program, if needed.

Other Information

OPTION	DESCRIPTION
Network ID	The Windows login for the group.

OPTION	DESCRIPTION
Personnel Number	Organization number for the group.
Badge Number	Badge number for the group.
Other ID	Any secondary ID for the group.

3. After you edit the information, click OK. The group-specific dialog box closes. You return to the group-specific window with the group still selected.

EDIT THE CONTACTS FOR A GROUP

1. In the left pane of the group-specific window, select Contacts.
2. In the right pane of the window, select the contact that you are editing, and then do one of the following:

» To set the selected contact as the default contact for the group, click Set Default, and then click Yes at the prompt.

» To edit the information for the contact, click Edit. The Contact dialog box opens. The dialog box displays the information for the selected contact.

3. Edit the information for the contact as needed. See .

FIELD	DESCRIPTION
Contact	The name of the contact. Note: The name can be a maximum of 50 characters, including spaces.
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an

FIELD	DESCRIPTION
	international group.
Phone Fax	The phone number and fax number for the group. Note: The Phone and Fax fields have a dropdown list available on which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.

FIELD	DESCRIPTION
External Reference	Links the contact to an outside program if needed.
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. Note: If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. Note: You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the

FIELD	DESCRIPTION
	prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

4. Click OK. The Contact dialog box closes. You return to the group-specific window with Contacts still selected.

EDIT THE CALCULATIONS FOR A GROUP

1. In the left pane of the group-specific window, select Calculations, and then click Edit. The Calculations dialog box opens.
2. Do one or both of the following:

» On the Available list, select the calculation, or CTRL-click to select the multiple calculations that are to always apply to this group, and then click the Move button (>) to move the selected calculations to the Selected list. If the appropriate calculation is not available, you can configure it. See Configure Calculations.

» On the Selected list, select the calculation, or CTRL-click to select the multiple calculations that are not to apply to this group, and then click the Remove button (<) to move the selected calculations to the Available list.

> Tip: Remember, you can also assign calculations for a group type. If you have already assigned calculations for this group's type, then these calculations are automatically applied to the group. To edit group type calculations, you must either edit the calculations at the group type level (see "To configure group types"), or you must edit the group type for the group. See "To edit summary, billing, and/or other group information".

3. After you edit the information, click OK. The Calculations dialog box closes. You return to the group-specific window with Calculations still selected.

EDIT THE BILLING REFERENCE NUMBERS FOR A GROUP

1. In the left pane of the group-specific window, select Billing References.
2. In the right pane of the window, select the billing reference number that you are editing, and then click Edit. The Billing Reference dialog box opens. The dialog box displays the information for the selected billing reference number.
3. Edit the information for the billing reference number as needed.

OPTION	DESCRIPTION
Billing Reference	The billing reference number that is associated with the group. Note: The PO number can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the billing reference number.

OPTION	DESCRIPTION
Notes	Any other comments or statements that are applicable for the billing reference number.
Inactive	Leave this option blank to add the reference as an active reference (the billing reference number is to be available when a reservation is made for the group). Select this option to inactivate the billing reference number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. After you edit the information, click OK. The Billing Reference Number dialog box closes. You return to the group-specific window with Billing References still selected.

EDIT THE PO NUMBERS FOR A GROUP

1. In the left pane of the group-specific window, select PO Numbers.
2. In the right pane of the window, select the PO number that you are editing, and then click Edit. The PO Number dialog box opens. The dialog box displays the information for the selected PO number.
3. Edit the information for the PO number as needed.

OPTION	DESCRIPTION
PO Number	The PO number that is associated with the group. Note: The reference can be alphanumeric and it has a maximum of 100 characters, including spaces.
Description	A description of the PO number.
Notes	Any other comments or statements that are applicable for the PO number.

OPTION	DESCRIPTION
Inactive	Leave this option blank to add the PO number as an active number (the PO number is to be available when a reservation is made for the group). Select this option to inactivate the PO number.

4. Optionally, click Spelling to spell check the information for the billing reference number before you save it.
5. After you edit the information, click OK. The PO Number dialog box closes. You return to the group-specific window with PO Numbers still selected.

EDIT EVERYDAY USERS FOR A GROUP

When you edit the Everyday Users for a group, you can select additional Everyday Users for the group, or you can remove Everyday Users for the group. If you need to edit the Everyday User itself or the delegates for a Everyday User, you must do so in the Everyday User configuration area. (See “Configuring Everyday Users”.)

1. In the left pane of the group-specific window, select Everyday Users. The Everyday Users dialog box opens.
2. Do one or both of the following:

» To add a new Everyday Users for the group:

» Leave the Find field blank, and then click Display to open a list of all currently active Everyday Users. Select the Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.

» In the Search By dropdown list, select the option by which to search (Email Address or User Name) and then in the Find field, enter the string by which to filter your search, and then click Display. Select the Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected users to the Selected list.

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

» To remove an Everyday User from a group, in the Selected field, select the user, or
CTRL-click to select the multiple Everyday Users that you are removing from the group, and then click the Remove button (<) to move the selected Everyday Users to the Available list.

3. After you edit the information, click OK. The Everyday User dialog box closes. You return to the group-specific window with Everyday Users still selected.

Import Groups

You can import groups into your EMS database from a tab-delimited text file. (See Also:Group Import File Specifications.)

1. On the toolbar, click the Groups icon. The Groups window opens.

2. Click More, and then click Import Groups. The Open File dialog box opens.
3. Browse to and select the text file that lists the groups that are importing. A dialog box opens, indicating the number of groups that you are about to import, and asking you if you want to continue.
4. Click Yes. A message opens indicating that the import was successful.
5. Click OK to close the message and return to the Groups window.

Configure Contacts

A contact is a person who serves as the coordinator or focal point for a group. You have two options for configuring a contact for a group. You can configure a" free form" contact, which requires you to manually enter the contact information, or you can configure a contact from another group, which means that you do not have to manually enter the contact information. Instead, the group information is automatically used for the contact.

> Tip: You can also configure and edit a contact "on the fly" during the reservation process. See the EMS User's Manual for details.

This topic will include the following information:

- Configure Contacts
- Manually Configure Contacts
- Configure a Contact from a Group
- Create an Everyday User from a Contact

CONFIGURE CONTACTS

1. Open the Groups window and search for the group for which you are configuring the contact. See “To search for a group and/or contact”.
2. Select the group, and then click Open. A group-specific window open. The group is automatically selected in the window.

Group-specific Window

3. In the left pane of the group-specific window, select Contacts. A list of all currently active contacts for the group is displayed in the right pane of the group-specific window.

> Tip: Optionally, to display all group contacts regardless of status, click Show Inactive. Any inactive contacts are displayed in red italics in the right pane.

4. Continue to either manually configure a contact or configure a contact from a group.

MANUALLY CONFIGURE CONTACTS

1. Click New. The Contact dialog box opens.

Contact Dialog Box

2. Enter the information for the new contact.

FIELD	DESCRIPTION
Contact	The name of the contact. Note: The name can be a maximum of 50 characters, including spaces.

FIELD	DESCRIPTION
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected. You cannot change this value.
Address	Populated with the address of the group that you selected. If the contact address is not the same as the group address, then clear Use Group Address and enter the appropriate values in the Address fields.
International	Select this option to drop the State and Zip fields for an international group.
Phone Fax	The phone number and fax number for the contact. By default, they are set to the phone number and fax number for the group, but you can always edit these values.

FIELD	DESCRIPTION
	Note: The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program if needed.

FIELD	DESCRIPTION
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. Note: If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. Note: You can always specify a contact as the default contact for a selected group at a later date. To do so, select the contact in the right pane of the group-specific window, click Set Default, and then click Yes at the prompt to set the selected user as the default contact.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

3. Optionally, do one or both of the following:

» Click Spelling to spell check the information for the contact before you save it.

» Create an Everyday User from the contact.

4. Click OK. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

CONFIGURE A CONTACT FROM A GROUP

1. Click Tools > Create Contact from Another Group. A second Groups window opens.
2. Search for the group that is to be the source of the contact, and then click Select. (See “To search for a group and/or contact”.) The Contact dialog box opens. The name of the group that you just selected is displayed in the Group field and you cannot edit this value. The remainder of the fields display the information for the selected group or user (Contact Name, Address, Phone, and so on.)

Contact Dialog Box

3. If needed, edit the information for the new contact.

FIELD	DESCRIPTION
Contact	The name of the contact. Note: The name can be a maximum of 50 characters, including spaces.

FIELD	DESCRIPTION
Title	The title (Mr., Ms., Dr., and so on) of the contact.
Group	Populated with the name of the group that you selected first (the group for which you are configuring the contact). You cannot change this value.
Address	Populated with the address of the contact. If the contact address is the same as the group address, then select Use Group Address to populated the address fields with the group address; otherwise, you can edit these values.
International	Not applicable if Use Group Address is selected. Select this option to drop the State and Zip fields from the address for an international contact.
Phone	The phone number and fax number for the group.

FIELD	DESCRIPTION
Fax	Note: The Phone and Fax fields have a dropdown list available from which you can select a different value (Fax, Mobile, Other, or Phone) for the field label, or you can enter a user-defined value. To enter a user-defined value, double-click the current field label to select it, and then enter the user-defined value over the selected label.
Email Address	The email address for the contact. Note: If your computer is connected to a network, click the Search icon to open a Global Address Lookup dialog box and search for the email address.
External Reference	Links the contact to an outside program if needed.

FIELD	DESCRIPTION
Notes	Any other information that is pertinent for the contact.
Set as Default	Select this option if the contact is to be the default contact for the selected group. Note: If a default contact has been defined for a group, then when you specify the group information for a reservation, the Contact field is automatically populated with the name of the default contact. Note: You can always specify a contact as the default contact for a selected group at a later date. See “To edit the contacts for a group”.
Inactive	Leave this option blank to add the contact as an active contact. Select this option to inactivate the contact.

4. Optionally, do one or both of the following:

- Click Spelling to spell check the information for the contact before you save it.
- Create an Everyday User from the contact.

5. Click OK. The Contact dialog box closes. The contact is added to the group. The group-specific window remains open.

CREATE AN EVERYDAY USER FROM A CONTACT

An Everyday User is a registered user who can submit requests for reservations or schedule reservations in EMS Web App. When you add a contact to a group in your EMS database, you might also need to create an Everyday User from the contact. This Everyday User can then create and view reservations on behalf of the contact in EMS Web App. You can create only one Everyday User from a contact. When you create an Everyday User, you can also specify one or more delegates for the Everyday User. A delegate is an Everyday User who can create and view reservations on behalf of another Everyday User.

1. If needed, open the group that contains the contact in the group's specific window. See "To configure contacts".
2. In the left pane of the group-specific window, make sure that Contacts is selected.
3. In the right pane of the window, select the contact from which you are creating the Everyday User.
4. Click Tools > Create Everyday User from Contact. A contact-specific dialog box opens. The Everyday User tab is the active tab.

The User Defined Fields tab displays the questions that an Everyday User was required to answer when the user requested to create an account through EMS Web App and it is not relevant to the procedure that is described below.

Contact-specific Dialog Box, Everyday User tab

Sean Symper

Everyday User | Process Templates | Customers | Delegates | User Defined Fields | Audit

Name: Sean Symper

Password:

Email Address:

Phone 1 / Phone 2: 555-555-5555

Notes:

External Reference:

Network ID:

Email Opt Out: ☐

Status: Active

Security Template: Copy of Web Admin

Time Zone:

Validated: ☐

Spelling | OK | Cancel

5. Enter the information for the new Everyday User.

Tip: Ideally, you should enter all the necessary information for your Everyday User before you save the Everyday User; however, at any time if you need to access your Everyday User, on the EMS menu bar, click Configuration > Everyday User Applications > Everyday Users.

FIELD	DESCRIPTION
Name	Automatically populated after you select the contact.
Password	The password that an Everyday User must enter to log in to EMS Web App.
Email address	If this information has been entered for the contact, then this field is automatically populated after you select the contact. If the field is blank, you must enter the full email address for the user. (The user must enter this address to log in to EMS Web App.)

FIELD	DESCRIPTION
Phone/Fax	Optional fields. If this information has been entered for the contact, then these fields are automatically populated after you select the contact. If the fields are blank, you can enter values if needed.
Notes	Optional field.
External Reference	Optional field. Links the Everyday User to an outside program if needed.
Network ID	Optional field. The Everyday User's network ID.
Email Opt Out	Select this option if the Everyday User is not to receive automatic emails (such as reservation summary emails) from EMS Web App. The user will still receive manually sent emails.

FIELD	DESCRIPTION
Status	Required field. Select the status for the Everyday User: » Active–The Everyday User can log in to EMS Web App. » Inactive–The user cannot log in to EMS Web App and is instructed to contact the EMS administrator. » Pending–The Everyday User cannot log in to EMS Web App and is informed that he/she must check back at a later time.
Security Template	Required field. This determines the Everyday User's access to the system–the menu items that the user can see and the information that the user can view in a tooltip when 'rolling-over' an event in EMS Web App. Note: For detailed information about Everyday User security templates, see “Configuring Everyday User Process Templates”.

FIELD	DESCRIPTION
Time Zone	Required field. Select the time zone for the user.

6. Open the Process Templates tab and on the Available list, select the Everyday User Process template or CTRL-click to select the multiple templates to which to which you are assigning the user, and then click the Move button (>) to move the selected templates to the Selected list.

> Tip: An Everyday User Process template defines the functions that are available to each type of Everyday User in EMS Web App when the user is submitting a request for a reservation. For detailed information about Everyday User Process templates, see “Configuring Everyday User Process Templates”.

7. Open the Groups tab and do one of the following to specify the groups on whose behalf the Everyday User can view and make reservations in EMS Web App.

- The contact's group is selected by default. You can leave this group in the Selected list, or you can select the group and click the Remove button (<).
- Specify any combination of search criteria for the Find field and Group Type, and then click Display to produce a list of all groups that meet the criteria. In the Available list, select a group, or CTRL-click to select multiple groups, and then click the Move button (>) to move the selected groups to the Selected list.

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

8. Open the Delegates tab, and on the Search by dropdown list, do one of the following to specify the delegates for the Everyday User:

- Leave the Find field blank, and then click Display to open a list of all currently available Everyday Users. Select an Everyday User, or

CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.

» On the Search By dropdown list, select the option by which to search (Email Address or User Name), and in the Find field, enter the string by which to filter your search, and then click Display. Select an Everyday User, or CTRL-click to select multiple Everyday Users, and then click the Move button (>) to move the selected Everyday Users to the Selected list.

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

9. Optionally, click Spelling to spell check any information that you manually entered for the user.
10. Click OK. The dialog box for creating an Everyday User closes and a message opens indicating that the Everyday User was created successfully.
11. Click OK to close the message and return to the group-specific window.

System Administration > Settings

In addition to configuring core data items that are specific to your organization, you must configure settings that determine a variety of operational factors for your EMS installation, such as system-wide parameters, registration information, email settings, and Reservation Wizard required fields.

See Also: Configure Help Text.

Edit System Parameters

System parameters are global settings that affect all your EMS users, your EMS Web App users, or your EMS Kiosk users. The parameters are grouped first by system (All Applications, EMS Desktop Client, EMS Web App, or EMS Kiosk) and then by the functional areas that they affect (Billing, Email, and so on). When any system is first installed, the parameters are set to their default value. Although you can edit the value for a system parameter whenever necessary, you typically set the value for a system parameter when you are configuring your EMS Desktop Client, EMS Web App, or EMS Kiosk implementations.

See Also: System Parameters.

1. On the EMS menu bar, click System Administration > Settings > Parameters. The Parameters window opens, listing all the current settings for parameters that affect all EMS users (All Applications tab), EMS Desktop Client users, all EMS Web App (and EMS Mobile App) users (Everyday User

Applications tab), and all EMS Kiosk users (Kiosk tab). The All Applications tab is the active tab.

2. Open the tab that contains the parameter that you are editing. To change field labels as they appear to your end-users, filter by "Labels" in the Area field.

> Tip: You can filter the list by area, by the parameter description, or both. To filter by the parameter description, enter a search string in the Filter field (characters must be in exact order but are not case-sensitive). For example, a search string of Security will result in both Security Status for a User and Default Security Template for a User.

3. Select the parameter that you are editing, and click Edit. The Parameter dialog box opens, showing information you can edit for the parameter.

> Tip: Each type of parameter may have special options that impact Everyday Users; this affects EMS Web App and EMS Mobile App.

4. Edit the parameter as needed, and click OK. The Parameter dialog box closes. You return to the Parameters window with the edited parameter automatically selected.
5. Confirm in the Value column that you have correctly edited the value for the parameter.
6. Click Close.

- If you edited EMS Desktop Client parameters, you might have to log out and then log back in to EMS Desktop Client for your changes to take effect.
- If you edited Everyday User Applications parameters, a message opens indicating that you must clear the EMS Web App cache for the changes to take affect. Click OK to close the message, and then clear the EMS Web App cache by logging in to EMS Web App, clicking Admin > Admin Functions, and then clicking Clear Cache.
- If you edited EMS Kiosk parameters, a message opens indicating that EMS Kiosk parameters have changed, and that you must clear the EMS Kiosk cache for the changes to take affect. Click OK to close the message, and then clear the EMS Kiosk cache by opening the EMS Kiosk config.aspx page.

Import Registration Information

The first time that your EMS application is accessed at your organization, a Registration dialog box opens. You must import the license file (License.lic) that was received with the software to register your software. You can change the database that your EMS system is using.

If you need to make any corrections to your registration information, contact sales@dea.com or 800-440-3994, ext. 863 to have a license file with the corrected registration information sent to you. You can then import this license file to update the registration information.

1. On the EMS menu bar, click System Administration > Settings > Registration. The Registration dialog box opens. This dialog box displays the registration information contained in the license file: your organization's name and address, the EMS edition (Workplace, Enterprise, and so on), the license expiration date, the limits for your software edition, and any additional packages for which your organization is licensed (for example, EMS Web App).

2. If the registration information is correct, continue to Step 3; otherwise, if the information is incorrect, contact sales@dea.com to have a corrected license file sent to you.

Registration Dialog Box

Registration
Import
Company Name: Workplace
Address:
Edition: EMS Workplace
Expiration Date: 12/31/2016
User Limit: Unlimited
Building Limit: Unlimited
Time Zone Limit: Unlimited
Category By Type Limit: Unlimited
Everyday User Process Template Limit: Unlimited
Everyday User Limit: 9999999
Kiosk App Profile Limit: Unlimited
Room Sign App Limit: Unlimited
Packages:
Package
Advanced CRM
Advanced Visitor Management
API (Read Only)
API (Updating)
Attendance Tracker
Cisco TMS Interface
Credit Card Processing
Change Database
OK
Cancel

3. To import your registration information, click Import, and in the Open File dialog box, browse to and select the license file (License.lic) that you are importing, and then click Open. The License file is imported.
4. If you need to change the database that your EMS application is using, go to Step 5; otherwise, click OK. The Registration dialog box closes. Your EMS application is now registered and is ready for use.
5. To change databases, click Change Database. The Provide Server Parameters dialog box opens.

Provide Server Parameters dialog box

6. Edit the server name and/or database name, and then click OK. EMS closes and the EMS Login window opens. You can now log in to EMS using the newly specified database.

Configure the Confirmation Email Subject Line

In EMS, users can produce printed confirmations for events. They can also email confirmations directly to the contact person. To make the emailing of confirmations efficient, EMS automatically fills in the subject line on the email with text that you configure in the Confirmation Email Subject Line dialog box. Examples of confirmation email subject lines include the following:

- Reservation 5421 for Acme, Inc., beginning 3/15/2012
- Confirmation for your event in Smith Hall on 3/22/2012

1. On the EMS menu bar, click System Administration > Settings > Confirmation Email Subject Line. The Confirmation Email Subject Line dialog box opens. This dialog box displays the confirmation subject line currently in use.

2. Enter the text and variables that are to make up the default subject line for every confirmation that is emailed.

Concept: Variables pull in selected data from the event for which the confirmation is being emailed. You can include variables in the subject line as described in the Legend. For example, %2% is the code for the group name, so "Reservation for %2%" would result in "Reservation for Academic Affairs" being displayed in the subject line. Available variables include the following: Reservation ID, Group Name, Event Name, Date of First Booking, Building Code, Room Code, and Location.

(This is the Drop-down text)

---

3. Click OK.

Reservation Wizard Required Fields

To ensure that your users supply the information that is critical for your organization when making a reservation, you can configure required fields in the Reservation Wizard. Required fields are marked with a red dot in the Reservation Wizard.

CONFIGURE REQUIRED FIELDS IN THE RESERVATION WIZARD

1. On the EMS menu bar, click System Administration > Settings > Reservation Wizard Required Fields. The Reservation Wizard Required Fields dialog box opens. This dialog box lists all the fields that are available on the Reservation Wizard.

Reservation Wizard Required Fields dialog box

2. On the Available list, select the field or CTRL-click to select the multiple fields that are to be marked as “Required” in the Wizard, and then click the Move button (>) to move the selected fields to the Selected list.
3. Click OK.

Configure Email Settings

The system administration email settings determine how your EMS implementation interacts with your organization's email standard—will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer protocol (SMTP), which is the default value? After installation of your EMS system, you must configure these settings.

1. On the EMS menu bar, click System Administration > Settings > Email Settings. The Email Settings dialog box opens.

2. Use one of the following methods to configure email:

- Leave Use SMTP selected, and then enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.
- Select Use Microsoft Outlook Only.
- Select SMTP for Mass Email Only Otherwise Use Microsoft Outlook, and then enter the appropriate values for Mode, Server, and Port in the SMTP Email panel. Select this third option if you want to use Outlook or Lotus Notes for all of your individual emails but use the mass email function found in the Browser and the Calendar. If you select this option and you use Lotus Notes, then individual emails open in the mass email window, but they are still sent via Lotus Notes.
- Select Use Lotus Notes. (Available only if Lotus Notes is installed on your computer.)

3. Click OK.

Global email settings in EMS are set by going to System Administration > Settings > Email Settings. These settings have no impact on your email notification service or Virtual EMS. *Only available to System Administrators.*

SMTP

- Tracks emails that have been sent in EMS (via the Reservation Navigator or *Reservations > Other > Email History*) which all EMS users can then view
- Can customize an SMTP signature line (*Settings > Preferences > SMTP Email Signature*)
- Reservation confirmation emails can originate from either "Department" or "User"
- Must have SMTP information available (server address, security settings, user account information) to specify in EMS during initial setup
- May need firewall settings configured to allow sending of email. Each client machine must be able to relay to SMTP server

Outlook

- Will not track emails sent through EMS. Email messages are stored in the Outlook sent messages folder for each user, subject to mailbox size limitations
- Sent emails originate from user's Outlook account (unless otherwise specified in Outlook, subject to mailbox permissions)
- EMS will launch Outlook like a web-based "Mail to" link. EMS will ONLY launch Outlook in this method and will NOT launch any other mail program

Gmail

- Each user must add their Gmail account information to *Settings > Preferences*
- Tracks emails sent through EMS within EMS (see *SMTP* above) and Gmail *Sent* folder
- Not available to users with 2-Step Account Verification on their Gmail account

Frequently Asked Questions

	SMTP	Outlook	Gmail
Can all outgoing email confirmations automatically be CC'ed to a distribution list?	No	No	No
Can an email be sent high priority?	No	Yes*	No
Compatible with EMS Web Client?	Yes	No	Yes
Saves attachments in EMS? *(Outlook & Gmail save attachments in mail client)*	Yes**	No	Yes**
Can all EMS users see emails that have been sent?	Yes	No	Yes
Compatible with EMS desktop client application in Citrix server environment?	Yes	No	Yes

**Must be set manually*
***Parameter setting – can greatly increase database size. Not recommended in SQL Express 2008 R2, not available in EMS Lite*

Set the Global Email Preference to SMTP and My Personal Email Preference to Outlook

SET THE GLOBAL EMAIL PREFERENCE TO SMTP

1. Log in to EMS Desktop Client as an Administrator.
2. Select System Administration > Settings > Email Settings.
3. Select Use SMTP.
4. Enter your SMTP information.

SET YOUR PERSONAL EMAIL PREFERENCE TO OUTLOOK

1. Select Settings > Preferences.
2. De-select Use Global Email Settings.
3. Select Use Microsoft Outlook.

System Administration > Security

In addition to configuring core data items that are specific to your organization, you must configure settings that determine a variety of operational factors for your EMS installation, including user security settings. These settings determine the functions to which your users have access in your EMS installation.

The Security menu under System Administration enables you to control security (what users have access to) by:

- User templates (and processes)
- Users
- User security

Security Menu

PLAN YOUR SECURITY CONFIGURATION

You can fine-tune security by configuring actions users should be allowed to take, information they can see, and rooms and buildings they can book. We recommend you configure security for EMS in the following phases:

- Configure Booking Templates (for instructions, See Also: Configuring Everyday User Templates)
- Configure User Templates (and associate them with User Processes)
- Configure Users (using User Templates as needed)

Concept: You Can Grant User Access to Categories, Processes, Buildings, Rooms, Statuses, and Queries by Group With User Templates

A user template defines the categories, processes, buildings, rooms,

statuses, and queries to which a group of EMS users has access. Instead of defining users individually and then configuring security for each user, you can configure a template and then assign all the users who are to have the same security settings to a given template in a single step. You can configure a user template entirely from “scratch,” or you can copy an existing user template, and then make the necessary edits to configure another template.

Overview of User Processes

When you configure a user template or a user account, you must assign one or more processes to the template or account. Each process grants a specific permission to the user. The following sections detail the event processes or academic event processes that you can assign to a user template or account, or an academic user template or account, respectively, and the permissions that are granted to the user by each process.

> Tip: Before assigning processes to a user template account, read through all the processes and note the implied relationships between certain items. For example, if you plan to give a user the right to edit a booking, you must also give the user the right to open a booking.

EVENT PROCESSES

Event processes are categorized according to the following:

- Billing Processes
- Configuration Processes
- Inquiry Processes
- Report Processes
- Reservation Processes
- Special Processes
- Hoteling Processes (Available only in EMS Workplace)

BILLING PROCESSES

PROCESS	PERMISSION GRANTED
Ageing Report	Run the Ageing report.
Browse Transactions	Use the Browse Transaction function.
General Ledger Distribution	Run the General Ledger Distribution report.
Invoice Detail Report	Run the Invoice Detail report.

PROCESS	PERMISSION GRANTED
Invoicing	Run the Billing Worksheet report and generate invoices.
Payments, Deposits & Adjustments	Enter payments, deposits, and adjustments.
Reprint an Invoice	Reprint an existing invoice.
Statements	Print financial statements for groups.
Transaction Report	Print the Transaction report.
Void an Invoice	Void an existing invoice.
Voided Transaction Report	Print the Voided Transaction report.

CONFIGURATION PROCESSES

PROCESS	PERMISSION GRANTED
Configure Everyday User Template LDAP Groups	Shows the LDAP Groups tab in the Everyday User Process Template settings window. Warning: This tab reveals the names of your Active Directory or other LDAP-type Groups.
Define and Edit [Configuration Item]	Add, change, or delete indicated configuration item. For example, Define & Edit Accounts provides add, change, or delete rights to the Accounts that are configured in your system.
Resource category items [Category	Resource categories that you have defined are also included as Configuration processes. Add, change, or delete resources from the selected categories.

PROCESS	PERMISSION GRANTED
Name]	
Web Data Translation	Allows a user to provide translations for items on the web.

INQUIRY PROCESSES

PROCESS	PERMISSION GRANTED
Browse Reservations	Use the Browser to search for existing reservations, bookings, service orders, and resources.
Calendar Inquiry	View the Calendar Inquiry, which shows the number of bookings on each day of a month in a wall calendar-type format.

PROCESS	PERMISSION GRANTED
Open Reservation Book	View the Reservation Book, which displays bookings for a day, week, or month as colored bars on a room/-timeline grid.
Resource Calendar Inquiry	View the Resource Calendar, which shows, on a monthly calendar, the number of times an item is reserved.
Visitors	Open the Visitors browser, which lists attendees by date and identifies visitors as such.

REPORT PROCESSES

REPORT NAME	PERMISSION GRANTED
< > Report	Run, review, and print the indicated report.
Define and Edit	Create and edit the queries that have been created

REPORT NAME	PERMISSION GRANTED
Queries	in the Query Builder.

RESERVATION PROCESSES

PROCESS	PERMISSION GRANTED
Academic Import (Academic Import Module)	Run the Academic Import Utility, which you use to manually import an academic course schedule into EMS.
Attendance Entry	Use the Attendance Entry function to note the actual attendance for bookings that took place on a particular date.
Delete Attach-	Give a user the ability to delete attachments for a

PROCESS	PERMISSION GRANTED
ments	room record, a reservation, a booking, or a group.
Email History	Review email history.
Manage Services	Give a user access to Manage Services option on the EMS toolbar and under the Reservations menu.
Open Navigator	Open a reservation in the Navigator window.
Open Reservation Wizard	Create a single-date or series reservation using the Reservation Wizard. This process also provides read-only access to groups.
Reminders	Use the Dashboard to add and manage reminders.

SPECIAL PROCESSES

PROCESS	PERMISSION GRANTED
Allow Department Selection	Select any of the defined departments when billing.
Copy Reservation	Copy a reservation, including all its bookings and details, from one date or date range, to another reservation.
Define Public Memorized Reports	Define the settings for public memorized reports.
EMS API Web Service Access	Used for optional EMS API.

PROCESS	PERMISSION GRANTED
Explode Combo Room	Use the Explode Combination Bookings utility, which takes the booking of combination room and breaks it down into bookings for the components of the combination room.
Edit Booking Details	Add or edit booking detail information.
Edit Critical Booking Information	Edit booking information that could cause one booking to be in conflict with another. The critical booking data items are date, reserved time, room, and status.
Edit Non-Critical Booking Information	Edit booking information that will not cause one booking to be in conflict with another (for example, the event name or the setup type and count).

PROCESS	PERMISSION GRANTED
Edit Pricing	Change the pricing on a booking detail item that has been reserved.
Edit Reservation Information	Edit reservation information.
View and Book Access On All Rooms	Grants rights to an EMS user for all rooms without having to explicitly provide access on the Rooms tab. Note: This overrides any selections that have been made in the Room Access area.

EVERYDAY USER PROCESSES (ADMINISTRATOR AND GUEST REQUEST)

PROCESS	PERMISSION GRANTED
Define and Edit Language Translations	Define and edit language translations in EMS Web App.
Define and Edit Web Menus	Define and edit web menus, including the creation and modification of links from EMS Web Appto other web pages.
Define and Edit Everyday User Process Templates	Define users' access to process templates that are used in EMS Web App.
Define and Edit Everyday User	Define users' access to security templates that are used in EMS Web App.

PROCESS	PERMISSION GRANTED
Security Tem-plates	
Define and Edit Help Text	Define and edit help text, page labels, and so on.
Define and Edit Everyday Users	Define and edit the users who have access to EMS Web App.
Web Reservations	Run the Web Reservations Browser, which displays reservations entered into your EMS database through EMS Web App.

HOTELING PROCESSES

PROCESS	PERMISSION GRANTED
Booking Notice Statistics	Run, review and print the Booking Notice Statistics report.
Check In Status	Run the Check In Status utility, which allows users to determine whether a group has checked in (or out) at your facility.
Check In Statistics	Run, review and print the Check In Statistics report.
Define and Edit Reservation Wizard Templates	Add, change, or delete reservation wizard templates.
Early Check Out Report	Run, review and print the Early Check Out Report.

PROCESS	PERMISSION GRANTED
Arrivals and Departures Report	Run the Arrivals and Departure report, which lists the respective arrival and departure times for each booking.
Groups With Multiple Bookings	Run, review and print the Groups With Multiple Bookings report.
No Show Report	Run, review and print the No Show Report.
No Show Wizard	Run the No Show Wizard.
Room Occupancy Summary	Run, review and print the Room Occupancy Summary report.
Transition Report	Run, review and print the Transition report.
Visitor Report	Run, review and print the Visitor report.

ACADEMIC EVENT PROCESSES

Academic event processes are categorized according to the following:

- Administrative Processes
- EMS Campus Planning Interface Processes
- CPI Configuration Processes
- CPI Course Processes
- CPI Inquiry Processes
- CPI Report Processes

ADMINISTRATIVE PROCESSES

PROCESS	PERMISSION GRANTED
Administrative processes	
Allow Domain Selection	Allows the user to select from all domains that are configured in the Academic planning area.

PROCESS	PERMISSION GRANTED
Copy Term Preferences	Allows a user to copy course preferences from one term to another.
Define and Edit Domains	Create and/or edit domains within the Academic Planning-Configuration area of EMS Academic Planning.
Define and Edit Final Exam Schedule Templates	Allows the user to create or make changes to the Final Exam Schedule template.
Define and Edit Final Exam Sessions	Allows the user to create and publish final exam sessions.
Define and Edit Optimization	Allows the user to create and apply an optimization scenario.

PROCESS	PERMISSION GRANTED
Scenarios	
Edit Terms	Allows the user to edit the mode of a term.
Manually Update SIS	Allows the user to manually push location updates back to the SIS, assuming that this has not been automated in the system parameters.
Publish/Unpublish Terms	Allows the user to publish a term and create room reservations in EMS or unpublish a term and delete room reservations in EMS.

EMS CAMPUS PLANNING INTERFACE PROCESSES

PROCESS	PERMISSION GRANTED
Web Administrator	Grants access to the administrative functions after the user is logged in to the EMS Campus Planning Interface client.

CPI CONFIGURATION PROCESSES

PROCESS	PERMISSION GRANTED
Define and Edit Academic Units	Allows the user to add or edit academic units.
Define and Edit Course Types	Allows the User to assign course types to event types.

PROCESS	PERMISSION GRANTED
Define and Edit Instructors	Allows the user to set the importance level of synchronized instructors.
Match Course Type/Room Types	The user can match a course type to a room type (or vice-versa) for course optimization.
Synchronize Academic Unit	User can synchronize the specified item from the SIS.
Synchronize Buildings	User can synchronize the specified item from the SIS.
Synchronize Course Types	User can synchronize the specified item from the SIS.
Synchronize	User can synchronize the specified item from the

PROCESS	PERMISSION GRANTED
Courses	SIS.
Synchronize Instructors	User can synchronize the specified item from the SIS.
Synchronize Room Types	User can synchronize the specified item from the SIS.
Synchronize Rooms	User can synchronize the specified item from the SIS.
Synchronize Subjects	User can synchronize the specified item from the SIS.
Synchronize Terms	User can synchronize the specified item from the SIS.

CPI COURSE PROCESSES

PROCESS	PERMISSION GRANTED
Add Courses	Allows the user to add new courses during Define & Edit mode or Dual mode.
Add Sections	Allows the user to create a new section of an existing course (copy courses) during Define & Edit mode or Dual mode.
Edit Course Credit Hours	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Days of the Week	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Enrollment	User can edit the specified course detail during Define & Edit mode or Dual mode.

PROCESS	PERMISSION GRANTED
Edit Course Instructor	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Notes	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Number	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Seat Fill	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Section	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Start/End	User can edit the specified course detail during Define & Edit mode or Dual mode.

PROCESS	PERMISSION GRANTED
Dates	
Edit Course Start/End Times	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Subject	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Title	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit Course Type	User can edit the specified course detail during Define & Edit mode or Dual mode.
Edit/Cancel Courses	The user edit or cancel existing courses during Define & Edit mode or Dual mode.

PROCESS	PERMISSION GRANTED
Override Time Block Patterns	The user can edit the Time Block for a term during Define & Edit mode or Dual mode.
Preassign Scenarios	The user can create and run Pre-assignment optimization scenarios during Set Preferences mode or Dual mode.
Search for Rooms	The user can search for rooms during Define & Edit mode or Dual mode.
Set Preferences	The user can set preferences for the course (for optimization) during Set Preferences mode or Dual mode.
Set Specific Room Preferences	The user can choose a specific room in Set Preferences mode or Dual mode.

PROCESS	PERMISSION GRANTED
Share Space Across Domains	The user can share space between two courses on different domains during Define & Edit mode or Dual mode.
Share/Unshare Space	The user can share space (or unshare space) between two courses on the same domain during Define & Edit mode or Dual mode.

CPI INQUIRY PROCESSES

PROCESS	PERMISSION GRANTED
Academic Book	The user can access the Academic Book.
Academic Browser	The user can access the Academic Browser.

PROCESS	PERMISSION GRANTED
Open Course Navigator	The user can open a course in the Navigator window.

CPI REPORT PROCESSES

REPORT NAME	PERMISSION GRANTED
< > Report	User can run and print the indicated report.

Configure Users

Users are the people who log in to EMS Desktop Client whether they are making reservations or just using the system in a read-only capacity. When your EMS Desktop Client application is first installed, it is installed with a default user admin account with “admin” for both the User ID and password. As EMS recommends, for security reasons, after you log in to EMS Desktop Client the first time using “admin” as both the username and password, at a minimum, you should change the account password. Ideally, you should configure an entirely new administrator account with a new username and password. You must also configure all the necessary accounts for your users, which includes assigning processes to the user account. You can create user accounts entirely from “scratch,” or you can copy an existing user account, and then make the necessary edits to the account for another user. You can also export a list of all your user accounts to an Excel spreadsheet.

> Note: Instead of configuring user accounts individually, you can configure a template and then assign it all users you want to have the same security settings. See Configure User Templates and Configure Academic User Templates.

This topic will provide information on the following:

- Configure an EMS Desktop Client User
- Set EMS Desktop Client User Event Security
- Set EMS Desktop Client User Categories
- Set EMS Desktop Client User Processes
- Configure EMS Desktop Client User Building Rights
- Specify EMS Desktop Client User Room Access
- Set User Status Options
- Set User Queries Option
- Set User Academic Security (EMS Campus Only)
- Set User Processes (EMS Campus Only)
- Export a List of User Accounts

CONFIGURE AN EMS DESKTOP CLIENT USER

1. On the EMS menu bar, click System Administration > Security > Users. The Users window opens. This window lists the names and types for all users who currently have an account for your EMS installation and that have a status of Active.

Users Window

Tip: You can see all user accounts, regardless of status: under Show, click Inactive.

Note: The remainder of this procedure describes how to configure a user account “from scratch.” You can also configure a user account by copying an existing account. Select the user account that you want to copy, click Copy, and then continue to Step 3.

2. Click New. The User dialog box opens.

User Dialog Box

3. Enter basic information for the new user in this dialog box and use the menu options to the left to define the user's access for each of the following: categories, processes, building configuration, room access, statuses and queries, and for EMS Campus, academic properties and processes (see the additional procedures in this topic).

User Fields

FIELD	DESCRIPTION
Name	First and last name for the user.
Administrator	Select this option if the user is to be an EMS Administrator. Note: If you select this option, then only Event Properties remains displayed on the User dialog box as an EMS administrative user has access to all EMS functions (categories, processes, buildings, rooms, statuses, and queries).
Initials	The user's initials, which are printed at the bottom of all reports as well as the date and time that the user ran the report.
Login Section	

FIELD	DESCRIPTION
User ID	The ID that the user must use to log in to EMS. Note: The User ID must be 20 characters or less, including spaces.
Password	The password that the user must use to log in to EMS. Note: The user can change this password. See the EMS User's Manual.
Network ID	If you enter a value in this field, the user is automatically logged in to EMS based on the user's Windows credentials without being asked to enter a user ID and password. Note: Enter the network domain along with the network ID, such as DOMAIN\john.doe.

FIELD	DESCRIPTION
External Reference	Links the user account to an outside program, if needed.
Contact Information	
Phone	The phone number for the user. This value is not printed on any correspondence (reports, emails, and so on) from the user.
Fax	The fax number for the user. This value is not printed on any correspondence (reports, emails, and so on) from the user.
Email Address	The email for the user. This value is not printed on any reports that the user generates; however, this is a required value if the user wants to email reports or confirmations from EMS using the SMTP email option.

FIELD	DESCRIPTION
Job Information	
Title	The user's title, such as Mr., Ms., and so on.
Notes	Any additional information that is relevant to the user. Note: This information is not printed on any report.
Inactive	Leave this option blank to add the user as an active user. Select this option to inactive the user's account. An inactive user cannot log in to EMS.

4. Click OK. The User dialog box closes. You return to the Users window with the newly configured user automatically selected.

SET EMS DESKTOP CLIENT USER EVENT SECURITY

1. If needed, open the User dialog box. (See Configure a User Account.)
2. Select Event Properties. The User dialog box is refreshed with options for the event security settings for the user.

User dialog box, Event Properties

3. Specify the event security settings for the user.

Event Properties Field

FIELD	DESCRIPTION
Event Properties Section	
Template	If you select a template, then only the Event Properties options remain available. The categories, processes, buildings, rooms, statuses, and queries are automatically assigned to the user based on the selected template. See “Configuring User Templates”.
Defaults Section	
	All the values that you select here (Building, Status, Event Type, Event Name, Event Time, Reservation Source, and Time Zone) are displayed by default when the user opens the Reservation Wizard to make a reservation; however, the user can edit any and all values as needed.

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with

the newly configured user automatically selected in the window.

SET EMS DESKTOP CLIENT USER CATEGORIES

You specify the categories that a user can add to a booking or edit for a booking on the Categories tab.

1. From the User Dialog Box, select Categories. The User dialog box is refreshed with a list of all the active categories that you can select for the user.

User dialog box, Categories

3. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

> Tip: To add these categories to a booking, a user needs access to the Edit Booking Details process.

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with

the newly configured user automatically selected in the window.

SET EMS DESKTOP CLIENT USER PROCESSES

1. From the User dialog box, select Processes. The User dialog box is refreshed with a list of all the processes that you can select for the user.

User dialog box, Processes

2. On the Available list, select the process or CTRL-click to select the multiple processes to which a user is to have access, and then click the Move button (>) to move the selected processes to the Selected list.

> Tip: For an explanation of each process, see “Event processes”.

3. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

CONFIGURE EMS DESKTOP CLIENT USER BUILDING RIGHTS

You specify the building configuration rights for a user on the Buildings tab.

1. From the User dialog box, select Configure Buildings. The User dialog box is refreshed with a list of all the buildings that you can select for the user.

User dialog box, Buildings

3. On the Available list, select the building or CTRL-click to select the multiple buildings to which a user is to have access, and then click the Move button (>) to move the selected buildings to the Selected list.

> Tip: Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings.

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

SPECIFY EMS DESKTOP CLIENT USER ROOM ACCESS

You specify the rooms to which a user has access on the Room Access tab.

1. From the User dialog box, select Room Access. The User dialog box is refreshed a options for searching for the rooms to add to the user account.

User dialog box, Room Access

2. Search for the rooms to which the user is to have access by doing one or both of the following and the Available list will update with a list of rooms that meet your search criteria:

» On the Building dropdown list, select (all) buildings, a specific building, an area, or a view.

» On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

3. On the Available list, select the room or CTRL-click to select the multiple rooms to which a user is to have access, and then click the Move button (>)

to move the selected rooms to the appropriate Selected list.

> Tip: EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book–A user who has access to the Special - Edit Critical Booking Information process and who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

> Tip: The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

- View Only–A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details

process, the user can view events in the room and add resources to events in the room.

4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

SET USER STATUS OPTIONS

You select the statuses to which a user is to have access on the Statuses tab. A user needs access to a status in order to create a reservation with the status or edit a booking with the status.

1. From the User dialog box, select Statuses. The User dialog box is refreshed with a list of all the active event statuses that you can select for the user.

User dialog box, Statuses

2. On the Available list, select the status or CTRL-click to select the multiple statuses to which a user is to have access, and then click the Move button (>) to move the selected statuses to the Selected list.
3. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

SET USER QUERIES OPTION

You specify the queries that a user can run on the Queries tab.

Tip: You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. From the User dialog box, select Queries. The User dialog box is refreshed with a list of all the defined queries that you can select for the user account.

User dialog box, Queries

3. On the Available list, select the query or CTRL-click to select the multiple queries to which a user is to have access, and then click the Move button (>) to move the selected queries to the Selected list.
4. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

SET USER ACADEMIC SECURITY (EMS CAMPUS ONLY)

1. From the User dialog box, select Academic Properties. The User dialog box is refreshed with options for the academic security settings for the user.

User dialog box, Academic Properties (EMS Academic Planning only)

2. Specify the academic security settings for the user.

Academic Security Fields

FIELD	DESCRIPTION
Type	• Domain—The domain (typically renamed to campus or school) to which the user belongs. • Academic Unit—The academic unit (typically renamed to

FIELD	DESCRIPTION
	academic department or division) to which the user belongs.
Domain	The domain to which the user belongs.
Academic Unit	Available only if the user is assigned the type of “Academic Unit.” The academic unit to which the user belongs.
Template	The academic template to which the user is assigned. The template determines the academic processes to which the user has access. See Configuring Academic User Templates.

3. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

SET USER PROCESSES (EMS CAMPUS ONLY)

1. From the User dialog box, select Processes (under Academic Properties). The User dialog box is refreshed with a list of all the academic processes that you can select for the user.

User dialog box, Academic Processes (EMS Academic Planning only)

2. On the Available list, select the academic process or CTRL-click to select the multiple academic event processes to which a user is to have access,

and then click the Move button (>) to move the selected processes to the Selected list.

> Tip: For an explanation of each process, see “Academic event processes”.

3. Continue with any other configuration for the user as needed; otherwise, click OK to close the User dialog box and return to the Users window with the newly configured user automatically selected in the window.

EXPORT A LIST OF USER ACCOUNTS

1. On the EMS menu bar, click System Administration > Security > Users. The Users window opens. This window lists the names and types for all users who currently have an account for your EMS installation.
2. Click Export. The Save As dialog box opens. The default file name is User List, file type is *.xls.
3. You can change the file name, and save the file in a location of your choosing.

Configure User Templates

Users are the people who log on to EMS, whether they are making reservations or just using the system in a read-only capacity.
See Also: Learn more here about types of EMS users.

A user template defines the categories, processes, buildings, rooms, statuses, and queries to which a group of EMS users has access. Instead of defining users individually and then configuring security for each user, you can configure a template and then assign all the users who are to have the same security settings to a given template in a single step. You can configure a user template user entirely from “scratch,” or you can copy an existing user template, and then make the necessary edits to configure another template.

If the users you are configuring are also EMS Academic Planning users, then you must also define academic user templates for these users.
See Configuring Academic User Templates.

This topic provides information on the following

» Configure a User Template
» Specifying Categories
» Configure Processes
» Configure Buildings
» Specify Room Access
» Specify Statuses
» Specify Queries

CONFIGURE A USER TEMPLATE

1. On the EMS menu bar, click System Administration > Security > User Templates. The User Templates window opens. This window lists all the user templates currently configured in your EMS database and that have a status of Active.

> Tips: Optionally, to show all templates, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure a user template “from scratch.” You can also configure a user template by copying an existing template. Select the user template that you want to copy, click Copy, and then continue to Step 3

2. Click New. The User Template dialog box opens.

3. In the Description field, enter a name or description for the new user template.

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

4. Defining the user access for each of the following–categories, processes, building configuration, room access, statuses and queries.

5. Click OK. The User Template dialog box closes. You return to the User Templates window with the newly configured template automatically selected.

SPECIFYING CATEGORIES

You specify the categories that a user who is assigned to this template can add to a booking or edit for a booking on the Categories tab.

1. If needed, open the User Template dialog box.
2. Select Categories. The User Template dialog box is refreshed with a list of all the active categories you can select for the user template.

3. On the Available list, select the category or CTRL-click to select the multiple categories to which a user is to have access, and then click the Move button (>) to move the selected categories to the Selected list.

> Tip: To add these categories to a booking, a user needs access to the Edit Booking Details process.

4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

CONFIGURE PROCESSES

1. From the User Template dialog box, select Processes. The User Template dialog box is refreshed with a list of all the processes that you can select for the user template.

2. On the Available list, select the process or CTRL-click to select the multiple processes to which a user is to have access, and then click the Move button (>) to move the selected processes to the Selected list.

> Tip: See Also: For an explanation of each process, see [Overview of User Processes]

3. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the

User Templates window with the newly configured user template automatically selected in the window.

CONFIGURE BUILDINGS

You select the building configuration rights for a user who is assigned to this template on the Buildings tab.

1. From the User Template dialog box, select Buildings. The User Template dialog box is refreshed with a list of all the buildings you can select for the user template.

2. On the Available list, select the building or CTRL-click to select the multiple buildings to which a user is to have access, and then click the Move button (>) to move the selected buildings to the Selected list.

> Tip: Define and Edit Buildings and Define and Edit Rooms security processes are required for a user to have configuration access to selected buildings and/or rooms.

3. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

SPECIFY ROOM ACCESS

You specify the room access for a user who is assigned to this template on the Room Access tab.

1. From the User Template dialog box, select Room Access. The User Template dialog box is refreshed a options for searching for the rooms to add to

the user template.

2. Search for the rooms to which to add to the user template by doing one or both of the following and the Available list will update with a list of rooms that meet your search criteria:

» On the Building dropdown list, select (all) buildings, or select a specific building.

» On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

3. On the Available list, select the room or CTRL-click to select the multiple rooms to which a user is to have access, and then click the Move button (>) to move the selected rooms to the appropriate Selected list.

> Tip: EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

» View and Book–A user who has access to the Special - Edit Critical Booking Information process and who is assigned to this template can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

> Tip: The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

» View Only–A user who is assigned to this template cannot reserve the room, move an event into or out of the room, or change the time or status of an

event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

4. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

SPECIFY STATUSES

You specify the statuses to which a user who is assigned to this template is to have access on the Statuses tab. A user needs access to a status in order to create a reservation with the status or edit a booking with the status.

1. From the User Template dialog box, select Statuses. The User Template dialog box is refreshed with a list of all the active event statuses you can select for the user template.

2. On the Available list, select the status or CTRL-click to select the multiple statuses to which a user is to have access, and then click the Move button (>) to move the selected statuses to the Selected list.
3. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

SPECIFY QUERIES

You specify the queries that a user who is assigned to this template can run on the Queries tab.

> Tip: You can specify the queries to run by user only in EMS Enterprise. All queries are available to all users in EMS Professional.

1. From the User Template dialog box, select Queries. The User Template dialog box is refreshed with a list of all the defined queries you can select for the user template.

2. On the Available list, select the query or CTRL-click to select the multiple queries to which a user is to have access, and then click the Move button (>) to move the selected queries to the Selected list.
3. Continue with any other configuration for the template as needed; otherwise, click OK to close the User Template dialog box and return to the User Templates window with the newly configured user template automatically selected in the window.

Configure Academic User Templates

If the EMS users who are to have the same security settings are also EMS Academic Planning users, then you must configure academic user templates for these users. An academic user template defines the academic event processes to which a group of EMS Academic Planning users has access. Instead of defining campus users individually and then configuring security for each user, you can configure a template and then assign all the users who are to have the same security settings to a given template in a single step. You can configure an academic user template user entirely from “scratch,” or you can copy an existing academic user template, and then make the necessary edits to configure another template.

1. On the EMS menu bar, click System Administration > Security > Academic User Templates. The Academic User Templates window opens. This win-

dow lists all the academic user templates that are currently configured in your EMS database and that have a status of Active.

Academic User Templates window

Tips: Optionally, to show all templates, regardless of status, under Show, click Inactive.

The remainder of this procedure describes how to configure an academic user template “from scratch.” You can also configure an

academic user template by copying an existing template. Select the academic user template that you want to copy, click Copy, and then go to Step 3.

2. Click New. The Academic User Template dialog box opens.

Academic User Template dialog box

3. In the Description field, enter a name or description for the new academic user template.

> Tip: The name or description can be a maximum of 30 characters, including spaces.

4. Select Processes, and define the user access for the appropriate academic processes.

Tip: For an explanation of each process, see Overview of User Processes.

5. Click OK. The Academic User Template dialog box closes. You return to the Academic Users Template window with the newly configured template automatically selected.

Configure User Security for Multiple User Accounts

If you configure users individually (that is, you are not using user templates) and you need to mass assign security to multiple users (for example, you have added a new room and many of your users need access to the room), then you can use the User Security function. You can use the User Security function to mass assign security for categories, processes, rooms, and statues for multiple users that have been individually configured.

This topic will provide information on:

- Configure User Security for Multiple User Accounts
- Configure Mass User Security for a Category
- Configure Mass User Security for a Process
- Configure Mass User Security for a Room
- Configure Mass User Security for a Status

> Tip: If you need to mass assign security for queries to multiple users, you can do so from within the Query Builder itself. See the EMS User's Manual for detailed information.

CONFIGURE USER SECURITY FOR MULTIPLE USER ACCOUNTS

1. On the EMS menu bar, click System Administration > Security > User Security. The User Security dialog box opens.

User Security Dialog Box

2. On the Type dropdown list, select the item for which you are configuring user security—Category, Process, Room, or Status.

CONFIGURE MASS USER SECURITY FOR A CATEGORY

1. On the Category dropdown list, select the specific category for which you are configuring user security. The User Security dialog box is refreshed with a list of all individual users who do not have access to the selected category (the left Users list), and a list of all individual users who do have access to

the selected category (the right Users list). All administrator users are displayed as well. (By default, an administrator user has access to all categories in an EMS database, and therefore, this list is not enabled.)

User Security dialog box, Categories

2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected category, and then click the Move (>) button to move the selected users to the right Users list.
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

CONFIGURE MASS USER SECURITY FOR A PROCESS

1. On the Process dropdown list, select the specific process for which you are configuring user security. The User Security dialog box is refreshed with a list of all individual users who do not have access to the selected process (the left Users list), and a list of all individual users who do have access to the selected process (the right Users list). All administrator users are displayed as well. (By default, an administrator user has access to all processes in an EMS database, and therefore, this list is not enabled.)

User Security dialog box, Processes

2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected process, and then click the Move (>) button to move the selected users to the right Users list.
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

CONFIGURE MASS USER SECURITY FOR A ROOM

1. On the Building dropdown list, select a building, and then on the Room drop-down list select the specific room in the building for which you are configuring user security. The User Security dialog box is refreshed with a list of all individual users who do not have access to the selected room (the left Users list), a list of all individual users who have View and Book access to the selected room and a list of all individual users who have View Only access to the room. All administrator users are displayed as well. (By default, an administrator user has access to all processes in an EMS database, and therefore, this list is not enabled.)

User Security dialog box, Rooms

2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected room, and then click the Move (>) button to move the selected users to the appropriate Users list.

> Tip: EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book–A user who has access to the Special - Edit Critical Booking Information process and who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

> Tip: The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list.

- View Only–A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details process, the user can view events in the room and add resources to events in the room.

3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

CONFIGURE MASS USER SECURITY FOR A STATUS

1. On the Status dropdown list, select the specific status for which you are configuring user security. The User Security dialog box is refreshed with a list of all individual users who do not have access to the selected status (the left Users list), and a list of all individual users who do have access to the selected status (the right Users list). All administrator users are displayed as well. (By default, an administrative user has access to all statuses in an EMS database, and therefore, this list is not enabled.)

User Security dialog box, Statuses

2. On the left Users list, select the user, or CTRL-click to select the multiple users who are to have access to the selected status, and then click the Move (>) button to move the selected users to the right Users list.
3. Continue with any other security configuration as needed; otherwise, click Close to close the User Security dialog box.

System Administration > Tools

You have several tools at your disposal in EMS to assist you in your administrative duties. These include a tool to update various group attributes such as pricing plans or account name, managing memorized reports, viewing logged-in users and if necessary, log these users off your EMS system, emailing logged-in users, deleting old data in your EMS database, and so on.

Change Group Wizard

You use the Change Group Wizard to update various group attributes. You can reassign an account, an event coordinator, a group type, a payment type, a pricing plan, a sales category, or a salesperson.

TO USE THE CHANGE GROUP WIZARD

The following procedure is written from the perspective of changing an account, but by analogy, you can follow this procedure to change any of the allowed properties for your group records.

1. On the EMS menu bar, click System Administration > Tools > Change Group Wizard. The Change Group Wizard opens.

Change Group Wizard

2. Select Account (the property to change), and then click Next. You are prompted to select an account to change.

Change Group Wizard

3. Select the account that you want to change, for example Equipment Charges.

The Change Group Wizard is updated with information that indicates the number of groups that use the account that you are changing.

Change Group Wizard

4. Click Next.

The Change Group Wizard prompts you to select an account to replace all instances of Equipment Charges.

Change Group Wizard

5. Select the appropriate account, for example, Denver A/V, and then click Finish.
6. A Property Changed message opens, indicating that the property was changed, and the number of groups that were affected.
7. Click OK to close the message and the Change Group Wizard.

Change Reservation Wizard

You use the Change Reservation Wizard to change various properties for all reservations or all future reservations with bookings after a specific date in a single step. You can change the calendar style, the event coordinator, the event type, the sales category, the salesperson, the reservation source, or the web user.

> Tip: The following procedure is written from the perspective of changing the event type, but by analogy, you can follow this procedure to change any of the allowed properties for your reservations.

1. On the EMS menu bar, click System Administration > Tools > Change Reservation Wizard. The Change Reservation Wizard opens.

Change Reservation Wizard

2. Select Event Type for the property to change, and then do one of the following:

» Select All Reservations.

» Select Future Reservations with Bookings After, and then select a booking date.

> Tip: The date must be greater than or equal to the current day's date.

3. Click Next. The Change Reservation Wizard prompts you to select an event type to change.

Change Reservation Wizard

4. Select an event type, for example, Fundraiser. The Change Reservation Wizard is updated with information that indicates the number of reservations that use the selected event type.

Change Reservation Wizard

5. Click Next. The Change Reservation Wizard prompts you to select an event type to replace all instances of “Fundraiser.”

Change Reservation Wizard

6. Select a different event type, for example, Fundraising Dinner, and then click Finish. A Property Changed message opens, indicating that the property was changed, and the number of reservations that were affected.

7. Click OK to close the message and the Change Reservation Wizard.

Room Administration Wizard

You use the Room Administration Wizard to identify new rooms that have been configured in your EMS database and add these rooms to or delete these rooms from public views, notification rules, group notification rules, users, user templates, Everyday User process templates, and if applicable, kiosk profiles. (If you are using the Room Administration Wizard in EMS Academic Planning, then you can add specific rooms to or delete specific rooms from domains and/or academic units.)

This topic will include the following information:

- Using the Room Administration Wizard
- Use the Room Administration Wizard to Add Rooms
- Using the Room Administration Wizard to Delete Rooms

USING THE ROOM ADMINISTRATION WIZARD

1. On the EMS menu bar, click System Administration > Tools > Room Administration Wizard. The Room Administration Wizard opens.

Room Administration Wizard

2. Do one of the following:

» If you are using the wizard to add rooms to a view, rule, or so on, then leave Add On or After Date selected, if needed, select a date, and then continue to “To use the Room Administration Wizard to add rooms”.

> Tip: The default value for the date is the current day’s date.

» If you are using the wizard to delete rooms from a view, rule, or so on, select Remove, and then continue to “To use the Room Administration Wizard to delete rooms”.

USE THE ROOM ADMINISTRATION WIZARD TO ADD ROOMS

1. On the Building dropdown list, select all buildings, a specific building, or an area. All rooms that have been added to the selected building or area on or after the indicated date are displayed.

2. Optionally, do one or both of the following to filter the rooms that are displayed. As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

» On the Classification dropdown list, leave the default value of (all), or select a specific room classification.

» On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

> Tip: The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of "Mee" returns Meeting room, but not Science Meeting room.

4. Select the room or CTRL-click to select the multiple rooms that you are adding, and then click Next. The Room Administration Wizard is updated with a list of the public views that are currently configured in your EMS database.

Room Administration Wizard, Public Views

5. Do one of the following:

» To keep all public views as is (none of the selected rooms are to be added to any existing public views), leave Keep Existing Settings selected, and then click Next.

» To add the selected rooms to one or more of the existing public views, click Add to Existing Settings, and on the Available list, select the view or CTRL-click to select the multiple views, click the Move (>) button to move the selected views to the Selected list, and then click Next.

6. Repeat the process detailed in Step 5 to move through the configuration process for each of the remaining configuration items–Notification Rules, Group Notification Rules, Users, User Templates, Everyday User Process Templates, and if applicable, Kiosk Profiles.

» For Users, User Templates, and Everyday User Process Templates, a third option, Overwrite Existing Settings is available. If you select this option, then the current (existing) room access for the configuration item is replaced by the room access that you define here. For example, if you select Overwrite Existing Settings for Users, then any room access that has been previously defined for a selected user is replaced by the room access that you define here.

7. Do one or more or all of the following as needed:

» For Notification Rules, Group Notification Rules, and Kiosk Profiles, go to Step 8.

» For Users and User Templates, select the appropriate access, and then go to Step 8.

> Tip: EMS Enterprise has both the View and Book and the View Only access for user security. EMS Professional has just the View and Book access for user security.

- View and Book–A user who has access to the Special - Edit Critical Booking Information process and who is assigned to this option can reserve the room, move an event into or out of the room, change the time or status of an event that is scheduled in the room, and add resources to events in the room.

> Tip: The Special - View and Book Access On All Rooms process can be used as an alternative to manually assigning all rooms to the View and Book list. See “Configuring User Security for Multiple User Accounts”.

- View Only–A user who is assigned to this option cannot reserve the room, move an event into or out of the room, or change the time or status of an event that is scheduled in the room; however, as long as the user has access to the appropriate category and to the Special - Edit Booking Details

process, the user can view events in the room and add resources to events in the room.

- For Everyday User Process Templates, select the appropriate access, and then go to Step 8.
- Move rooms that can be reserved without approval (that is, booked into the Reserve Status on the Everyday User Process Template tab) into the Reserve pane.
- Move rooms that require approval (that is, booked into the Request Status on the Everyday User Process Template tab) into the Request pane.

8. Click Finish. A Process message opens indicating that you are about to process the selected rooms and possibly overwrite data, and asking you if it is OK to continue.

9. Click Yes. A message appears indicating that the rooms were processed successfully, and asking you if you want to select more rooms.

10. Do one of the following:

- Click Yes to close the message and return to the Room Administration Wizard.
- Click No to close the message and the Room Administration Wizard.

USING THE ROOM ADMINISTRATION WIZARD TO DELETE ROOMS

1. On the Building dropdown list, select all building, a specific building, or an area. All rooms that have been configured for the selected building, area, or view are displayed.

2. Optionally, do one or both of the following to filter the rooms that are displayed. As you select your search criteria, the list of rooms that meet the search criteria is dynamically updated.

» On the Classification dropdown list, leave the default value of (all), or select a specific room classification.

» On the Room Type dropdown list, leave the default value of (all), or select a specific room type.

3. Optionally, to further filter the displayed search results based on the Room Name, in the Filter field, enter a search string.

> Tip: The search string is not case-sensitive, but your search is limited to the exact order of the characters in the string and it must begin with the information for which you are searching. For example, a search string of Mee returns Meeting room, but not Science Meeting room.

4. Select the room or CTRL-click to select the multiple rooms that you are removing, and then click Next. The Room Administration Wizard is updated with a list of the public views that are currently configured in your EMS database and that contain the selected room or rooms.

Room Administration Wizard, Public Views

5. Do one of the following:

» To keep all public views as is (none of the selected rooms are to be removed from any of these public views), leave Keep Existing Settings selected, and then click Next.

» To remove the selected rooms from one or more of the public views, on the Available list, select the view, or CTRL-click to select the multiple views from which you are removing the rooms, click the Move (>) button to move the selected views to the Selected list, and then click Next.

6. Repeat the process detailed in Step 5 to move through the configuration process for each of the remaining configuration items–Notification Rules, Group Notification Rules, Users, User Templates, Everyday User Process Templates, and if applicable, Kiosk Profiles.
7. Click Finish. A Process message opens indicating that you are about to process the selected rooms and possibly overwrite data, and asking you if it is OK to continue.
8. Click Yes. A message appears indicating that the rooms were processed successfully, and asking you if you want to select more rooms.
9. Do one of the following:

» Click Yes to close the message and return to the Room Administration Wizard.
» Click No to close the message and the Room Administration Wizard.

Manage Saved Reports

A saved report is a report for which the filter settings have been saved, or saved, so that you do not have to adjust the filter settings every time you run the report. A saved report always has an owner, and it can be a public report (available to all users in your EMS database), or it can be a private report (available only to the owner of the report.) You use the Manage saved Reports tool to edit or delete a saved report.

To learn more about creating Save Reports, see Working with Saved Reports. To learn more about creating Automated Reports from Saved Reports with EMS, see Creating Automated Reports.

1. On the EMS menu bar, click System Administration > Tools > Manage Saved Reports. The saved Report Setups window opens. By default, this window lists the saved reports of all types that are configured in your EMS database.

2. Optionally, select on the Report Type dropdown list, select a report type to filter the list of reports that are displayed.
3. Select a saved report, and then continue to one of the following:

EDIT A SAVED REPORT

1. Click Edit. A Save Report Setup dialog box opens, populated with the information for the selected report.

2. Edit one or more of the following for the report–the report description, the availability of the report (if the report is not to be available to the all users, then clear the Public option; otherwise, select the Public option), and/or the report owner.
3. Click OK. The save Report Setup dialog box closes and you return to the save Report Setups window with the newly edited report automatically selected.

DELETE A SAVED REPORT

1. Click Delete. A message opens asking you if you are sure that you want to delete the selected saved report.
2. Click Yes. The message closes. The report is deleted.

Override Existing Bookings Utility

In some situations, such as a building closure, a scheduled maintenance repair, a priority event, and so on, you might need to “bump” one or more bookings from their scheduled location. You use the Override Existing Bookings Utility to bump all the bookings that meet specific criteria and place them in a Conflict status. A new all day booking that uses the settings (Event Name, Event Type, and Group) that you specify is created in place of these bumped bookings.

1. On the EMS menu bar, click System Administration > Tools > Override Existing Bookings Utility. The Override Existing Bookings Utility window opens.

Override Existing Bookings Utility window

2. Do the following to search for the rooms that contain the bookings that you are bumping. A list of all the rooms configured for the selected building, area, or view and that are of the indicated Room Type will display on the Available list.

- On the Building dropdown list, select a specific building, area, or view.
- On the Room Type dropdown list, leave the Room Type set to the default value of (all), or select a specific room type.

3. Select the room, or CTRL-click to select the multiple rooms that contain the bookings that you are bumping, and then click the Move button (>) to move the selected rooms to the Selected list.
4. Repeat Step 2 and Step 3 until you have selected all the rooms that contain the bookings that you are bumping.
5. Enter a Start Date and an End Date to filter the list of bookings that you are bumping for the selected rooms.
6. Optionally, to see a list of the bookings that you are bumping, click View Bookings; otherwise, go to Step 7. The View Bookings window opens. A list of all rooms with the bookings that you are bumping is displayed in the window.

> Tip: Optionally, you can select a booking in this window, and then click Open to open the booking's reservation in the Navigator for a more detailed examination, and you can also click Export to export the list of

bookings to an Excel spreadsheet. After you have viewed the bookings and/or exported the booking, click Close to close the View Bookings window and return to the Override Existing Bookings Utility window.

View Bookings window

Date	Res Start	Res End	Event Start	Event End	Time Zone	Room	Event	Group	Statu
2/7/2012 Tue	8:00 AM	12:00 AM	8:00 AM	12:00 AM	MT	F-101	ENGL-104-01 Academic Writing and Research	Registrar - Main Campus	Acade
2/8/2012 Wed	8:00 AM	9:20 AM	8:00 AM	9:20 AM	MT	F-101	CHEM-437-02 Physical Chemistry for Engineers	Chemistry Department	Acade
2/8/2012 Wed	9:00 AM	9:50 AM	9:00 AM	9:50 AM	MT	C-101	HIST-101-01 World History I	Registrar - Main Campus	Acade
2/8/2012 Wed	10:00 AM	10:50 AM	10:00 AM	10:50 AM	MT	F-101	MATH-201-01 Calculus I	Math Department	Acade
2/8/2012 Wed	11:00 AM	11:50 AM	11:00 AM	11:50 AM	MT	C-101	HIST-570-01 Impact of Literature on the Renaissance	Registrar - Main Campus	Acade
2/8/2012 Wed	11:00 AM	11:50 AM	11:00 AM	11:50 AM	MT	F-101	HIST-300-01 Greek History	Registrar - Main Campus	Acade
2/8/2012 Wed	12:00 PM	12:50 PM	12:00 PM	12:50 PM	MT	F-101	MATH-202-01 Calculus II	Math Department	Acade
2/8/2012 Wed	1:00 PM	4:00 PM	1:00 PM	4:00 PM	MT	F-101	CHEM-437-02 Physical Chemistry for Engineers	Chemistry Department	Acade
2/8/2012 Wed	2:00 PM	2:50 PM	2:00 PM	2:50 PM	MT	C-101	HIST-101-02 World History I	Registrar - Main Campus	Acade
2/9/2012 Thu	8:00 AM	9:50 AM	8:00 AM	9:50 AM	MT	F-101	MATH-202-02 Calculus II	Math Department	Acade

7. Specify the event type, event name, the status, and the group for the new all day bookings that are to be created in place of the bumped bookings.

Tip: If the appropriate event type is not available, you can configure it. See “Configuring Event Types”. If the appropriate status is not available, you can configure it. See “Configuring Statuses”. You can select

a group from the Group dropdown list, or you can search for a group. If the appropriate group is not available, you can configure it.
See “Configuring Groups”.

8. Select the Override Existing Bookings Conflict Status (the status to which the bumped bookings are changed).

Tip: If the appropriate status is not available, you can configure it.
See “Configuring Statuses”. If you select a status with a Cancel type, a Cancel Status dialog box opens. You must enter a cancel reason and indicate who canceled the booking for Cancel type status. Optionally, you can also enter notes about the booking cancellation.

9. To update the reservation status to the status for the new all day bookings, leave Update Reservation Status; otherwise, clear this option to leave the reservation status unchanged.
10. Click Finish. A message appears indicating that the existing bookings (which are all the bookings the meet the search criteria) will be overridden

and set to the conflict status that you selected and asking you if it is OK to continue.

11. Click Yes. The message closes and the Navigator opens, displaying the new all day bookings with their new status.

Import Reservations Utility

This utility enables you to import existing reservations into your EMS database from a tab-delimited text file. (See Import File Specifications for the import file specifications.) Importing reservations is a two-step process.

1. Configure the reservation import. See also: Best Practices for Importing Reservations.
2. After you configure the import, you must import the reservations. You an can also delete an import session.

This topic will include information on the following:

- Best Practices for Using the Reservation Import Utility
- Configure the Reservation Import
- Import Reservations Into a Session
- Delete a Reservation Import
- See Also: Reservation Import File Specifications

BEST PRACTICES FOR USING THE RESERVATION IMPORT UTILITY

The practices below are recommended for preparing existing reservations for import into EMS.

To view the fields you are importing in order, from EMS System Administration > Tools > Import Reservation Utility, you can use Print > Import Format to view the fields in order. These fields are explained below.

- Date (This can be in MM/DD/YYYY format if you are in US. If your computer is using DD/MM/YYY format, your file should match that format.
- Start time (This must be HHMM, like 0800 - Excel will try removing the leading zero, so you can format the column as Text, or as More Number Formats > Custom and enter "HHMM" as the custom format).
- End time (This must be HHMM, like 1700).
- Building (This is EMS Building Code, not description).
- Room (This is EMS Room Code).
- Event Name (255 character max).

- Group (e.g., Host, Customer, Employee if you have relabeled it in your organization).
- **1st Contact**
- **Setup Count**
- Reservation Grouping (this number behaves similarly to an EMS reservation number: you should use the same number for each booking that should be grouped together. You can start with 1 and work upwards from there; all lines with a "1" will go under one reservation, so if you have a three day meeting, "1" would appear on the first three lines, then start with #2 for the next reservation).
- Billing Reference (this can be left blank if not required).

ADDITIONAL BEST PRACTICES

- Your import file must be tab-delimited. The easiest way to generate the file is by using Excel and then copying and pasting into Notepad, and saving that file.
- Make sure the Group, 1st Contact, and Billing Reference are the same for all bookings within any single reservation. (For example, Taylor cannot be the contact for Monday while Chris is the contact for Tuesday)

- Group Name will be matched based on the first one found in your database. If you have two groups called "Pat Lee", EMS will pick the first one and assign it to all matching reservations.
- Values for 1st Contact will create contacts in EMS as temporary contacts.
- Everyday User and Everyday User Process Templates will not be assigned to imported reservations.
- If you choose to map Everyday Users to your imported reservations, you should also make sure the Everyday User you assigned is set to "Active" security status. If an Everyday User logs on for the first time and they already have reservations created, they will be moved from "Activate on Logon" status to "Pending" status and you will need to manually activate their account. You can prevent this by making their account "Active" in advance.
- Be sure not to copy any header rows when you import. Your first row in Notepad should have tabs between, instead of spaces.
- Selecting the checkbox to "Skip Notifications" causes all imported bookings to bypass the checks for any EMS Notification Rules. The utility has been successfully used for importing tens of thousands of records at a time, but if you are processing notification rules, large batches could take a very long time to complete.

- The Import Utility only allows you to specify the Start Date. If your start time is greater than your end time, EMS will assume your end date is one day later. You cannot import a single booking longer than 24 hours.
- All times should be local to the time zone of the building you're booking. For example, 0800 for New York, and 0800 for London would create 8:00 am bookings in the respective buildings.
- Once you start loading your import file, if you see "Unassigned" rooms or groups/people, that means the data in your import file did not find an exact match. You can manually fix rooms and groups individually, but if you notice that there are way too many to cleanup individually, you may be better off deleting the import session, then fixing your import file, and then creating a new session. If you create manual mappings, they will be remembered for future import sessions.
- After launching an import, you may see a failure message. The import may have completed anyways, so after waiting a while, check to see before re-launching the import.
- If you are importing vidoeconference reservations, you will need to one more step for them to have associated reservation numbers: after the import, for these reservations use the "Move Bookings" option to move them to a primary reservation number. That reservation should then be marked as "Videoconference" in EMS, and a host site designated.

» Setup and Teardown time are not included in the import. If you need the room blocked including setup/teardown time, you can set your start time and end time to reflect the entire duration for which you wish to block the room, or you can modify the bookings post-import.

CONFIGURE THE RESERVATION IMPORT

Note: This section describes the steps for configuring a new reservation import. If you simply need to load an existing import, then after opening the Reservation Import Sessions window, skip to the following section, Import Reservations Into a Session.

1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility. The Reservation Import Sessions window opens. This window lists all the reservation sessions that have been imported into your EMS database.

2. Click New. The Reservation Import Session dialog box opens.

3. Enter the information for the new import session. See also: Best Practices for Importing Reservations

OPTION	DESCRIPTION
Conflict Status	Available only if you select a status with a type of Book Space. This status is applied only if the status that you selected results in the imported bookings being in conflict with existing bookings. Note: If the appropriate status is not available, you can configure it. See Configure Statuses.
Description	A name or description for the import session. Note: The name can be a maximum of 50 characters, including spaces.
Event Type	Select the event type for the imported reservations.

OPTION	DESCRIPTION
	Note: If the appropriate event type is not available, you can configure it. See Configuring Event Types.
Override Conflict Status	Available only Override Existing Bookings is selected. If imported bookings override existing bookings, then select the conflict status into which the overridden bookings are to be placed. Note: If the appropriate status is not available, you can configure it. See Configure Statuses.
Override Existing Bookings	Select this option if the imported bookings are to override existing bookings.
Reservation Source	Select a source if applicable.

OPTION	DESCRIPTION
	Note: If the appropriate reservation source is not available, you can configure it. See Configure Reservation Sources.
Setup Type	Select the setup type for the imported reservations. Note: If the appropriate setup type is not available, you can configure it. See Configure Setup Types.
Status	Select the status that is to be applied to the imported reservations. Note: Only statuses that do not have a Reconfirm Date are available. If the appropriate status is not available, you can configure it. See Configure Statuses.

4. Click OK. The Reservation Import Session dialog box closes. You return to the Reservation Import Sessions window. The newly configured import

session is displayed in the window.

IMPORT RESERVATIONS INTO A SESSION

1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility to open the Reservation Import Sessions window.
2. Select the reservation session into which you are importing the reservations, and then click Load. The Import Reservations wizard opens.

3. Click the Search icon to browse to and select the file you are importing, and then click Next. The Import Reservations wizard displays all the

reservations in the import file by the building/room combinations that have been assigned to them.

> Tip: If a Building/Room combination in the import file is identical to a Building Code/Room code in the EMS database, then the record is automatically assigned; otherwise, the record remains unchanged.

4. To filter the list, select a different view on the View dropdown list and/or a different building on the Building dropdown list.
5. To work with room assignments:

- To Assign a Room, select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Assign to open the Room Selector dialog box and select the room in your EMS database.
- To Exclude a Room from the Import, select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Do Not Import. This excludes all the reservations that are assigned to this Building/Room combination.
- To Unassign a Room, select a Building/Room Combination, or CTRL-click to select multiple combinations, and then click Unassign.

6. Click Next. The Import Reservations Wizard displays all groups that are assigned to reservations in the import file.

> Tip: If a group name in the import file is identical to a group name in the EMS database, then the record is automatically assigned; otherwise, the record remains unassigned.

7. To work with groups:

» To Assign a Group, select a group, or CTRL-click to select multiple groups, and then click Assign to open the Groups window, and select the group in your EMS database for which all reservations that are assigned to the selected group will be made.

- To Exclude a Group From the Import, select a group, or CTRL-click to select multiple groups, and then click Do Not Import to exclude all reservations that are assigned to this group.
- To Unassign a Group, select a group, or CTRL-click to select multiple groups, and then click Unassign to undo a Group assignment.

8. Click Finish. A message opens indicating that the reservations were imported successfully.
9. Click OK to close the message and the Import Reservations Wizard and return to the Reservation Import Sessions window.

DELETE A RESERVATION IMPORT

You can delete a reservation import session. If you delete an import session, all reservations in the session are deleted. Because you cannot recover these reservations other than to repeat the import process, make certain you want to delete the session.

1. On the EMS menu bar, click System Administration > Tools > Import Reservations Utility. The Reservation Import Sessions window opens. This win-

dow lists all the reservation sessions that have been imported into your EMS database.

2. Select the import session that you are deleting, and then click Delete. A message opens informing you that all reservations related to the session will be deleted and asking you if it is OK to continue.
3. Click Yes. The message closes. The import session is deleted.

View and Email Logged-In Users

A user who is currently logged in to your EMS system is referred to as an active user. You view logged-in users and if necessary, log these users off your EMS system. You can also send an email to all users who are currently logged in to EMS.

Tip: To receive email, a user must have an email address configured for his/her user account.

1. On the EMS menu bar, click System Administration > Tools > Active Users. The Active Users window opens. This window lists all the users who are currently logged in to your EMS system, the date and time they logged in to the system, and in multi-EMS database environments, the database that they are logged in to. An asterisk (*) marks the user account that you used to log in.

Active Users window

2. Optionally, do one or both of the following:

» To log a user off of the system, select the user, or CTRL-click to select multiple users, and then click Logout.

> Tip: Users who are logged off of the system can complete the process they are currently involved in (making a reservation, editing a booking, and so on), but when they attempt to start another process, a message

pens informing them that they have been logged out and must restart EMS.

» To send an email to a user, select the user and then click Email. A blank email, pre-addressed to the user, opens. The To field is populated with the email address that was defined for the user, but you can edit this value if needed. Create and send the email as you normally would.

SMTP Email window

Email
Spelling
Attachments
From:
admin@dea.com
To...
heatherfres@ddd.com
Cc...
Bcc...
Subject:
Test
Attachments:
No Files Attached
Message:
Times New Roman
16
Send
Cancel

Delete Old Data

As the EMS administrator, you can delete bookings, historical data, email history, holidays, building hours, notifications, and if applicable, EMS Kiosk transactions that occur on or before a specific date. You can also delete unused groups, contacts and web users (groups, contacts, and web users who have no associated records in your EMS database). If you delete all the bookings for a reservation, the reservation is also deleted from the EMS database. As a safeguard, it is a system requirement that the date that you specify for bookings, historical data, email history, holidays, building hours, or notifications be at least three months prior to the current day's date.

Before using the Delete Old Data utility, make a backup of your EMS database. Deletion of data using this utility is a permanent deletion and you can recover the data only by using a backup copy of your EMS database.

1. On the EMS menu bar, click System Administration > Tools > Delete Old Data. The Delete Old Data dialog box opens.

Delete Old Data dialog box

2. Select that data that is being deleted, and then, if applicable enter the on/or before deletion date.

> Tip: The date that you specify for bookings, historical data, email history, holidays, building hours, notifications, and /or kiosk transactions must be at least three months prior to the current day's date.

3. Click OK. A message appears indicating that deleting this data is a permanent action and asking you if it is OK to continue.

> Tip: Remember, if you delete all the bookings for a reservation, the reservation is also deleted from the EMS database; however, no message opens indicating that the reservation was also deleted.

4. Click Yes. A message opens when all the data is deleted.

5. Click OK.

Currency Configuration Wizard

Once you configure a currency in your EMS database, you can assign the currency to buildings, categories, and/or calculations. You can assign the currency to a single building, category, or calculation during configuration, or you can use the Currency Configuration Wizard to assign the currency to multiple buildings, categories, and/or calculations in a single step.

1. On the EMS menu bar, click System Administration > Tools > Currency Configuration Wizard. The Currency Configuration Wizard opens. All the active currencies that are currently configured in your EMS database are displayed on the Currency dropdown list.

2. On the Currency dropdown list, select the currency that you are assigning, and then click Next. The Currency Configuration Wizard, Buildings page opens. This page lists all the buildings that are currently configured in your EMS database.

3. On the Available list, select the building, or CTRL-click to select the multiple buildings to which you are assigning the currency, and then click the Move button (>) to move the selected buildings to the Selected list. When you assign a currency to a building, the currency is used to price all the rooms in the building. If the appropriate building is not available, you can configure it. See Configuring Buildings.
4. Click Next. The Currency Configuration Wizard, Categories page opens. This page lists all the active categories that are currently configured in your EMS database.

5. Select the category, or CTRL-click to select the multiple categories to which you are assigning the currency, and then click the Move button (>) to move the selected categories to the Selected list. When you assign a currency to a category, the currency is used to price all the resources in the category. If the appropriate category is not available, you can configure it. See Configuring Categories.
6. Click Next. The Currency Configuration Wizard, Calculations page opens. This page lists all the active calculations that are currently configured in your EMS database.

7. On the Available list, select the calculation, or CTRL-click to select the multiple calculations to which you are assigning the currency, and then click the Move button (>) to move the selected calculations to the Selected list. When you assign a currency to a calculation, the currency symbol is used to display the results of the calculation. If the appropriate calculation is not available, you can configure it. See Configuring Calculations.
8. Click Finish. A message opens, asking you if you are sure that you want to set the currency on the selected items to be <selected currency>? For

example, "Are you sure that you want to set the currency on the selected items to be US Dollars?"

9. Click Yes. The message closes and another message opens indicating that the currency configuration was successful.
10. Click OK to close the second message and the Currency Configuration Wizard.

Booking Move/Change Status Wizard

The Booking Move/Change Status Wizard allows you to change critical information (date and/or status) for multiple bookings across multiple reservations in a single step.

> Tip: Your users have access to the Change Booking Date/Time Wizard and the Change Booking Status Wizard in the Navigator. They can use these wizards to change critical booking information for multiple bookings in a single reservation.

This topic will provide the following information:

- Use the Booking Move/Change Status Wizard
- Move Multiple Bookings to a Different Date
- Change the status for multiple bookings

USE THE BOOKING MOVE/CHANGE STATUS WIZARD

1. On the EMS main menu, click System Administration > Tools > Booking Move/Change Status Wizard. The Booking Move/Change Status Wizard opens.

2. In the Start Date field, enter the starting date for the bookings for which you are changing the date and/or status, and in the End Date field, enter the ending date.

3. Leave the default values set to (all) for the other search criteria (Building, Status, and Event Type), or optionally, select different values as needed.

> Tip: For Building, you can select (all) buildings, a specific building, a specific area, or a specific view.

4. Click Get Data. The Select Bookings window opens. This window displays all the bookings that meet your search criteria.

Date	Start	End	Building	Room	Event	Status	Service Orders
2/8/2012 Wed	6:15 PM	12:15 AM	PAC	Lobby	test	Confirmed	Yes
2/9/2012 Thu	6:30 AM	8:00 AM	CCW	VC 201	VC	Confirmed	
2/9/2012 Thu	6:30 AM	8:00 AM	CCW	VC 202	VC	Confirmed	
2/9/2012 Thu	9:30 AM	11:00 AM	CCE	VC 310	VC	Confirmed	
2/10/2012 Fri	10:30 AM	12:00 PM	CCW	VC 201	VC Test	Confirmed	
2/10/2012 Fri	2:30 PM	4:00 PM	CCE	VC 310	VC Test	Confirmed	Yes
2/13/2012 Mon	10:30 AM	1:00 PM	CCW	VC 202	VC Test 2	Confirmed	
2/13/2012 Mon	12:15 PM	2:45 PM	CCW	VC 201	VC Test 2	Confirmed	
2/13/2012 Mon	3:30 PM	6:00 PM	CCE	VC 310	VC Test 2	Confirmed	Yes
2/29/2012 Wed	10:30 AM	12:00 PM	CCE	MR 302	Meeting	Confirmed	
3/5/2012 Mon	5:30 PM	9:30 PM	MU	MU Ballroom All	Paris-Robaix Stage Summaries	Confirmed	
3/6/2012 Tue	5:30 PM	9:30 PM	MU	MU Ballroom All	Paris-Robaix Stage Summaries	Confirmed	
3/7/2012 Wed	5:30 PM	9:30 PM	MU	MU Ballroom All	Paris-Robaix Stage Summaries	Confirmed	

5. Continue to one of the following:

- To move multiple bookings to a different date below.
- To change the status for multiple bookings.

MOVE MULTIPLE BOOKINGS TO A DIFFERENT DATE

1. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the date.
2. On the Select Bookings window, click Move. The Move Bookings dialog box opens.

3. Select a different value for the date, and then click OK. The Results window opens. This window displays a list of all the selected bookings, whether the date change was successful.

VALUE	DESCRIPTION
Reschedule Booking Earlier	The default value. Reschedule the bookings to an earlier date that is based on the number of days that you specify.
Reschedule Booking Later	Reschedule the bookings to a later date based on the number of days that you specify.
Reschedule Booking to Specific Date	Reschedule the bookings to a new date that you specify.

The Results Window

Tip: Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

4. Click Close to close the Change Booking Date Results window and return to the Select Bookings window.
5. Repeat Step 1 through Step 4 until you have moved all the bookings as needed.
6. Do one of the following:

- If you are done moving bookings to a different date, click Close to close the Select Bookings window.
- If you also want to change the status for any of the bookings, continue to the next section.

CHANGE THE STATUS FOR MULTIPLE BOOKINGS

1. Select the booking, or CTRL-click to select the multiple bookings for which you are changing the status.
2. On the Select Bookings window, click Change Status. The Change Status dialog box opens.

3. On the Status dropdown list, select the new status for the bookings.

> Tip: If you select any type of Canceled status, then three additional fields–Reason, Who Canceled and Notes–are displayed on the Change Booking Status window. You must enter data in all three of these fields before you can continue in the Wizard.

4. Enter a Reconfirm Date if it is required for the new status that you selected.
5. Optionally, select Update Reservation Status to have the reservation-level status changed as well.
6. Click Finish. The Results window opens. This window displays a list of all the selected bookings, whether the status change was successful or not.

Date	Start	End	Time Zone	Building	Room	Event	Status	Results
2/24/2012 Fri	10:00 AM	12:00 PM	CT	CHI	CW11 - Conference Room 2	Test VC	Confirmed	Change Successful
2/24/2012 Fri	12:30 PM	3:30 PM	ET	NY	Conference Room 2	Test VC	Confirmed	Change Successful
2/24/2012 Fri	5:30 PM	8:30 PM	GMT	LON	CQ02- Conference 1	Test VC	Confirmed	Change Successful
2/29/2012 Wed	9:00 AM	11:00 AM	CT	CHI	CW11 - Conference Room 2	TEST VC 2	Confirmed	Change Successful
2/29/2012 Wed	11:26 AM	7:00 PM	ET	NY	Visitor	Visitor - Anderson, Scott	Visitor	Change Successful
2/29/2012 Wed	12:30 PM	3:30 PM	ET	NY	Conference Room 2	TEST VC 2	Confirmed	Change Successful

Tip: Optionally, to view only the bookings for the selected reservation that were NOT successfully changed, select Show Unchanged Only. To view the details for a specific booking that was changed, select the booking, and then click Go To.

7. Click Close to close the Change Booking Status Results window and return to the Select Bookings window.
8. Repeat Step 1 through Step 7 until you have changed the status for all the bookings as needed.
9. Do one of the following:

» If you are done changing the status for the bookings, click Close to close the Select Bookings window.

» If you also want to move any of the bookings to a new date, see section above, “To change the status for multiple bookings”.

The Video Display Interface

The EMS Video Display Interface (VDI) is an optional, add-on component for EMS that exports meeting and event information to a video display system such as Janus, Target Vision, and so on. It does this by periodically saving booking information to a file which the video display system then retrieves and displays on video monitors. You use the windows-based Task Scheduler to set the frequency at which the EMS Video Display Interface program (EMS.exe) runs. This program stores the booking information and creates the export file. You set parameters in EMS that define the types of bookings that are to be included in the export file (based on buildings, statuses, and so on), where the exported file should reside, and other information. You must manually export the booking information once and create the export file before you can configure EMS to automatically export the information.

To integrate EMS with your video display, you will:

- Run the tool from EMS Desktop Client
- Configure settings for exporting booking information
- Export the data to your video display system
- Configure Windows Task Scheduler to automatically export data at a regular interval

1. On the EMS menu bar, click System Administration > Tools > Video Display Interface. The Video Display Interface dialog box opens. The Date Range tab is the active tab.

Video Display Interface

2. Specify the settings for exporting the booking information:

» The first time you configure the VDI, or if you edit your VDI settings, you must specify a date range for the system to save the settings. Going forward, the system automatically exports the information only for the bookings that are taking place on the current day's date based on the frequency that you specify.

» To export data for a different date or date range, on a one-time only basis, enter the date or range. If the export is to contain only bookings taking place in a particular time frame, check the Use Specific Times box and enter the starting and ending times. After this manual update, the system reverts to exporting data for the current day's date based on the frequency that you specify.

» In the Format field, select the pre-defined VDI export format. (If you select PowerPoint as the pre-defined VDI export format, then the Bookings for Slide fields is enabled. You must also indicate the number of bookings that are to appear on a slide.)

» In the Export File Path, click the Search icon to open Export File Path dialog box and browse to and select the file to which you are exporting the data, or you can manually enter the full path to the file with the file name and extension.

» On the Buildings tab, Statuses tab, Event Types tab, and Group Types tab, specify the building/room, status, event type, and group criteria by which to filter the booking information that you are exporting.

3. Click Export. A message appears indicating that the export file was created successfully.

4. Click OK.

> Tip: After you configure your export settings, you can click Memorize to save the export settings as a memorized report so that you do not have to specify the export settings every time you export your meeting and event information. If you save the export settings as a memorized report, you can make the report public (available to all users in your EMS database) or private (available only to you.)

After you have manually run the export once, you can set up the system to export events automatically. Following the steps outlined in your Windows operating system documentation, use the Task Scheduler to define

a scheduled task that executes EMS.exe on a regular basis (typically once each day). The file is located in the folder in which the client portion of the EMS system is installed. (The default is C:\Program Files\ EMS [PRODUCT NAME and VERSION NUMBER]). Before existing the Task Scheduler, select “Open advanced properties for this task when I click Finish” and append /vdi to the end of the EMS path in the “Run” textbox, for example:
“C:\Program Files\EMS [PRODUCT NAME and VERSION NUMBER]\EMS.exe”/vdi.

Migrate Data

Older versions of EMS use a Microsoft Access database. You use the Migrating Data tool to migrate data from these older databases into the current database version (SQL Server) for EMS.

1. On the EMS menu bar, click System Administration > Tools > Data Migration. The EMS Migration Utility opens.
2. Click Browse to browse to and select the Microsoft Access database that you are migrating.
3. In the EMS pane, enter the connection information for the new EMS database.
4. In the User Name and Password fields, enter the name and password that you use to log in to EMS.
5. Click Next. A message opens indicating that all existing EMS data will be overwritten by the migration process and asking you if you want to continue.
6. Click Yes. A dialog box opens, indicating the progress of the migration. When the migration process is complete, a migration complete message

opens.

7. Click OK to close the message, and then restart EMS.

System Parameters

This section details the EMS system parameters you can configure as the EMS Administrator.

You can access system parameters from the System Administration > Settings > Parameters menu option. From there, you select the parameters for the EMS product you wish to work with.

- EMS Desktop Client System Parameters
- EMS Web App Parameters
- EMS Kiosk Parameters
- EMS for Outlook System Parameters
- EMS Mobile App Parameters

EMS Desktop Client System Parameters

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
AIUDaysOfWeek	Academic Import Days Of The Week	Desktop Client > System Admi- nis-	Academic Import	Indicates how EMS determines the days of the week in import data.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tration > Settings > Parameters > Desktop Client tab		Note: If a positional option is selected, then the system does not recognize standard day of the week abbre-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				viations. For example, if Positional, Monday First is selected and the import data file contains MWF as the indicator for days of the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				spaces between the characters. A Monday/We-dnes-day/Friday class is cor-rectly indic-ated, in Positional, Monday First format

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_User_LoginFields	Field Used to Authenticate Everyday User	Desktop Client > System Administration > Set-	Authentication	Indicates the field—Email Address, Network ID, or External Reference—that is used to authenticate an everyday

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tings > Parameters > Everyday User Applications tab		user.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BillBySOCtl	Service Order End Time if None Specified	Desktop Client > System Administration > Settings >	Billing	Select Event Time or Reserved Time as the Service Order End Time, unless otherwise specified.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
DefaultRoundingMethod	Default Rounding Method for Hourly	Desktop Cli-	Billing	Allows you to specify the time

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Pricing	ent > System Administration > Settings > Parameters >		increment, from one minute to sixty minutes, by which to round the time for hourly pricing.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tions tab		
InvoiceDueDays	Determin-e Invoice Due Date by Adding 'xx' Days	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Billing	Sets the number of days spe-cified to determine the invoice due date, for example, 30 days.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
AcademicUnitTitlePlural	Academic Unit Title Plural	Desktop Client > System Administration > Settings	Campus	System-defined label for Academic Units. (Typically renamed to “Departments.”)

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
AcademicUnitTitleSingular	Academic Unit Title Singular	Desktop Cli-	Campus	System defined label for

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		Academic Unit. (Typically renamed to “Department.”)

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusAcademicBookCourseColor	Academic Book Course Color	Desktop Client > System Administration >	Campus	Color used for courses displayed in the Academic Book.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusAcademicBookCourseCross	Academic Book Cross-listed Course Color	Desktop Client > System Administration > Settings >	Campus	Color used for cross-listed courses displayed in the Academic Book.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
CampusAccumulateSharedSpaceE	Accumulate Enrollment On	Desktop Cli-	Campus	Accumulate enrollment on courses

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	Shared Space Courses (non-cross-listed only)	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		that share space instead of using the largest enrollment (which is the approach for cross-listed courses).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusAllowCrossDomainCrossLi	Allow Cross-Domain Cross Listings	Desktop Client > System Administration	Campus	If set to “Yes,” this indicates that courses can be cross-listed across multiple domains.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusAutoSyncProcessCancellations	Auto Sync - Automatically Process Cancellations	Desktop Client > System Administration > Settings	Campus	If auto-sync is enabled, then course cancellations in your SIS are automatically processed in EMS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
CampusAutoSyncProcessNewCoursesUr	Auto Sync - Automatically	Desktop Cli-	Campus	If autosynch is set to “Yes,”

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Process Courses not assigned to a Room	ent > System Administration > Settings > Parameters >		then new courses without a room in your SIS are automatically processed in EMS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusAutoSyncProcessRoomCapacity'	Auto Sync - Automatically Process Room Capacity Violations	Desktop Client > System Administration >	Campus	If autosynch is set to “Yes,” if a new course is added in your SIS that violates room capacity, then the course

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		is automatically processed in EMS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusAutoSyncUserID	Auto Sync User	Desktop Client > System Administration > Settings >	Campus	The EMS user account that is used by the autosync service for authentication.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
CampusCourseUDFTypeID-1	Course User Defined Field 01	Desktop Cli-	Campus	Maps an EMS user-defined field to a custom

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
Cam-pusCourseUDFTypeID-10	Course User Defined Field 10	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusCourseUDFTypeID-2	Course User Defined Field 02	Desktop Client > System Administration > Settings	Campus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
CampusCourseUDFTypeID-3	Course User Defined	Desktop Cli-	Campus	Maps an EMS user-defined field

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	Field 03	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusCourseUDFTypeID-4	Course User Defined Field 04	Desktop Client > System Administration >	Campus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusCourseUDFTypeID-5	Course User Defined Field 05	Desktop Client > System Administration > Settings >	Campus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
CampusCourseUDFTypeID-6	Course User Defined Field 06	Desktop Cli-	Campus	Maps an EMS user-defined field to a custom

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
Cam-pusCourseUDFTypeID-7	Course User Defined Field 07	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusCourseUDFTypeID-8	Course User Defined Field 08	Desktop Client > System Administration > Settings	Campus	Maps an EMS user-defined field to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
CampusCourseUDFTypeID-9	Course User Defined	Desktop Cli-	Campus	Maps an EMS user-defined field

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Field 09	ent > System Administration > Settings > Parameters >		to a custom field in your SIS.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusDefaultCancelReasonID	Default Cancel Reason	Desktop Client > System Administration >	Campus	Used for courses when publishing a term.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusDefaultEventTypeID	Default Event Type	Desktop Client > System Administration > Settings >	Campus	Used for courses when publishing a term.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
CampusDefaultGroupID	Default Group	Desktop Cli-	Campus	Used for courses when publishing a

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		term.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusDefaultReservationSourceII	Default Reservation Source	Desktop Client > System Administration	Campus	Used for courses when publishing a term.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusDefaultSeatFillPercentage	Default Seat Fill Percentage	Desktop Client > System Administration > Settings	Campus	Used to determine an appropriate room size for a class of a specific estimated enrollment (typically 100%).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
CampusDefaultSetupTypeID	Default Setup Type	Desktop Cli-	Campus	Used to build a setup type

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		and capacity (from the SIS) when synchronizing rooms (typically “classroom”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusFinalExamEventTypeID	Final Exam Event Type	Desktop Client > System Administration >	Campus	Used when creating a final exam booking.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusFirstDayOfWeek	Day Label - First Day Of The Week	Desktop Client > System Administration > Settings >	Campus	The default value is Sunday. Determines which day of the week is designated as the first day in various areas of EMS Campus such as

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		the Academic Book. The other allowed value is Monday.
CampusFridayLabel	Day Label 6 - Friday	Desktop Cli-	Campus	Determines the label that indic-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ates Friday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is F.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
Cam-pusIn-cludeCRNInEventNam-e	Include CRN in Reser-vation Event Name	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	Include the Course Reservation Number (CRN) in front of the event name post-publish in all areas of EMS

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		Campus where the event name is used.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusKeepSiblingCrosslistingsInSyı	Keep Sibling Crosslisting Room Assignments In Sync	Desktop Client > System Administration > Settings	Campus	A sibling cross-list describes a crosslist that has at least three courses and the two child courses have a meeting pat-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		tern that is not shared with the parent course. If set to “Yes,” then these sibling crosslist courses become a matched set and are placed in

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusLargeClassSize	Large class size (if more than xx students)	Desktop Client > System Administration >	Campus	Used to determine what constitutes a “large” class for weighting by enrollment in the room optimization process.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		Explained in detail in the Room Optimization section of the EMS User's Manual.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusLargeClassSizeWeight	Large class size weight adjustment	Desktop Client > System Administration > Settings	Campus	Used to adjust the optimization weighting for a “large” class. Explained in detail in the Room Optimization section of the EMS User’s

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		Manual.
CampusLockUnitRooms	Lock Academic Unit	Desktop Cli-	Campus	Used during optimization process. If

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	Room access	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		set to Yes, a room will be assigned to an Aca-demic Unit' (i.e. Depart-ment) course only if that Aca-demic Unit owns the room.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
CampusManualPublish	Manually update SIS/ERP System after Pub-lishing	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Cam-pus	If set to “No”, course loc-ation in the SIS will be auto-matically updated dur-ing the pub-lishing

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Set-tings > Para-mete-rs > Desk-top Cli-ent tab		process.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusMondayLabel	Day Label 2 - Monday	Desktop Client > System Administration > Settings >	Campus	Determines the label that indicates Monday in various areas of EMS Campus such as the Time Block Template configuration

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		area. The default value is M.
CampusSaturdayLabel	Day Label 7 - Saturday	Desktop Cli-	Campus	Determines the label that indic-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ates Saturday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is S.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
Cam-pusSmallClassSize	Small class size (if less than xx students)	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	Used to determine what con-stitutes a “small” class for weighting by enroll-ment in the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		room optimization process. Explained in detail in the Room Optimization section of the EMS User's Manual.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusSmallClassSizeWeight	Small class size weight adjustment	Desktop Client > System Administration > Settings	Campus	Used to adjust the optimization weighting for a “small” class. Explained in detail in the Room Optimization section of the EMS User’s

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		Manual.
CampusSundayLabel	Day Label 1 - Sunday	Desktop Cli-	Campus	Determines the label that indic-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ates Sunday in various areas of EMS Campus such as the Time Block Template configuration area. The default value is U.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
CampusSyncAcademicUnits	Allow Sync of Academic Units from SIS	Desktop Client > System Administration >	Campus	If set to “Yes,” the Synchronize Academic Units option is enabled in Academic > Configuration.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusSyncNoStartEndTimes	Sync Course Dates Without Start/End Times	Desktop Client > System Administration > Settings >	Campus	If set to No, Courses with incomplete course date records (i.e. missing start/end times or dates) will not be imported into EMS

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		Campus.
CampusThursdayLabel	Day Label 5 - Thursday	Desktop Cli-	Campus	Determines the label that indic-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ates Thursday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is R.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
CampusTuesdayLabel	Day Label 3 - Tues-day	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	Determines the label that indic-ates Tues-day in various areas of EMS Cam-pus such as the Time

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		Block Template configuration area. The default value is T.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CampusWebServiceURL	Web Service URL	Desktop Client > System Administration > Settings	Campus	The URL to the EMS Campus Planning Interface service.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
CampusWednesdayLabel	Day Label 4 - Wednesday	Desktop Cli-	Campus	Determines the label that indic-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ates Wednesday in various areas of EMS Campus such as the Time Block Template configuration area. Default value is W.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
DomainTitlePlural	Domain Title Plural	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Cam-pus	System defined label for Domains (typically renamed to “Cam-puses”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
DomainTitleSingular	Domain Title Singular	Desktop Client > System Administration > Settings >	Campus	System defined label for Domain (typically renamed to “Campus”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
SISTitle	SIS/ERP Title	Desktop Cli-	Campus	System defined label for SIS/ERP

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		(typically “SIS”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
SubjectTitlePlural	Subject Title Plural	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Cam-pus	System defined label for Subjects (typically “Subjects”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SubjectTitleSingular	Subject Title Singular	Desktop Client > System Administration > Settings	Campus	System defined label for Subject (typically “Subject”).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
SMTPSaveEmailAttachments	SMTP - Save Email	Desktop Cli-	Email	If enabled, any attach-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Attachments (Database Size Will Increase)	ent > System Administration > Settings > Parameters >		ments sent to a Group and/or Contact can be saved to the database. Does not apply to organizations using Outlook as

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		ail server. Database size will increase if this parameter is enabled.
SMTPSecurityProtocol	SMTP Security Protocol	Desktop Client > Sys-	Email	The security protocol for the mail server used to send

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tem Admi-nis-tration > Set-tings > Para-mete-rs > Desk-top		emails on behalf of the everyday user applic-ations. Options are no protocol, TLS, or SSL3.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SMTPUseSSL	SMTP - Use SSL	Desktop Client > System Administration > Set-	Email	Used if your SMTP Server is enabled for SSL.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tings > Parameters > Desktop Client tab		
EmailMode	Email Mode	Desk-	Email	The system

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		top Client > System Administration > Settings > Email		administration email settings determine how your EMS implementation interacts with your organization's

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tings		ard–will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer pro-tocol (SMTP), which is the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
EmailSubjectLine	Email Subject Line	Desktop Client > System Administration > Settings	Email	In EMS, users can produce printed confirmations for events. They can also email confirmations directly to the contact

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Confirmation Email Subject Line		person. To make the emailing of confirmations efficient, EMS automatically fills in the subject line on the email with text that

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
UseEMail	Enable Email Support	Desktop Client > System Administration >	Email	When set to “Yes,” you can, directly from EMS, email a Confirmation to the contact person for the group that is mak-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		ing a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SMTPMode	SMTP Mode	Desktop Client > System Administration > Settings >	Email	The system administration email settings determine how your EMS implementation interacts with your organ-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Email Settings		ization's email standard—will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer protocol (SMTP),

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SMTPServer	SMTP Email Server	Desktop Client > System Administration > Settings >	Email	The system administration email settings determine how your EMS implementation interacts with your organ-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Email Set-tings		ization's email stand-ard—will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer pro-tocol

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SMTPServerPort	SMTP Server Port	Desktop Client > System Administration > Settings >	Email	The system administration email settings determine how your EMS implementation interacts with your organ-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Email Settings		ization's email standard—will it interact with Microsoft Outlook or must you configure it to use a simple mail transfer protocol (SMTP),

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
				enter the appropriate values for Mode, Server, and Port in the SMTP Email panel.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
AllowExRefChg	Allow Desktop Client User to Change External Reference	Desktop Client > System Administration > Settings >	Groups & Contacts	If enabled, a desktop client user can change the External Reference values on Group and Contact records. Customers using HR Toolkit are

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > All Applications tab		strongly encouraged to disable this parameter so as not to disrupt the automatic association of these records with Web User records.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
LinkWebUsersToGroups	Everyday Users linked to Groups via External Reference	Desktop Client > System Administration > Settings >	Groups & Contacts	Links group and web user records if group records are defined as individual employees (i.e., not departments) in your sys-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > All Applications tab		tem. When making a new reservation in EMS, the web user field is automatically populated based on the group selected.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
AutoFillGroupFields	Offer Drop-Down Selection of Groups	Desktop Client > System Administration > Settings >	Groups & Contacts	When set to “Yes,” the system automatically populates the Group window with all active groups in your EMS database. A user can

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > Desk-top Cli-ent tab		enter a search string in the Starts with field to and the list of groups that meet the search cri-teria is dynamically updated as

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
DefaultCountry	Default Country	Desktop Client > System Administration > Set-	Groups & Contacts	Default value for Country when creating a new Group or Contact record.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tings > Parameters > Desktop Client tab		
DefaultGroupRatePlanID	Default Pricing	Desk-	Groups &	Default

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Plan For New Groups	top Client > System Administration > Settings > Para-	Contacts	value for Pricing Plan when creating a new Group record. Options are configured in the desktop client under Configuration >

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		rs > Desktop Client tab		> Pricing Plans.
DefaultInternational	Default Address Format as International	Desktop Client > Sys-	Groups & Contacts	If enabled, the International address checkbox is enabled by

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tem Administration > Settings > Parameters > Desktop		default when creating a new Group or Contact record.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
DefaultRequireContact	Default Require Contact	Desktop Client > System Administration >	Groups & Contacts	If enabled, the Require Contact checkbox is enabled by default when creating a new Group record. A user must

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		therefore also create at least one Contact record for the Group.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
GroupStatusBadTitle	Group Bad Status Title	Desktop Client > System Administration > Settings	Groups & Contacts	Label used for “Bad” value on the Group Status drop-down list.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
GroupStatusOKTitle	Group OK Status Title	Desktop Cli-	Groups & Conta-	Label used for “OK” value on the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >	cts	Group Status drop-down list.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
GroupStatusWarningTitle	Group Warning Status Title	Desktop Client > System Administration >	Groups & Contacts	Label used for “Warning” value on the Group Status drop-down list.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
RatePlanRequired	Pricing Plan Required For Groups	Desktop Client > System Administration > Settings >	Groups & Contacts	If enabled, a user must also specify a Pricing Plan when creating or editing a Group record. Pricing Plans are configured in the desktop

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		client under Configuration > Billing > Pricing Plans.
ShowGroupAccount	Show Account Field On Group	Desktop Cli-	Groups & Contacts	If enabled, an Account field is displayed on a

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		Group record.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
AreaTitlePlural	Area Title Plural	Desktop Client > System Administration	Labels	The plural label for the Area field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > All Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
AreaTitleSingular	Area Title Singular	Desktop Client > System Administration > Settings	Labels	The singular label for the Area field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > All Applications tab		
BillingReferenceTitle	Billing Reference Title	Desktop Cli-	Labels	The singular label for the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	Singular	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		Billing Refer-ence field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tions tab		
BillingReferenceTitlePlural	Billing Reference Title Plural	Desktop Client > System Administration >	Labels	The plural label for the Billing Reference field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > All Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BuildingTitlePlural	Building Title Plural	Desktop Client > System Administration > Settings >	Labels	The plural label for the Building field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > All Appli-catio-ns tab		
BuildingTitleSingular	Building Title Sin-gular	Desk-top Cli-	Labels	The sin-gular label for the Build-ing field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tions tab		
ConfirmationGrandTotalTitle	Confirmation Grand Total Title	Desktop Client > System Administration	Labels	The label for the Grand Total field on a Confirmation report.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > All Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ConfirmationSubtotalTitle	Confirmation Subtotal Title	Desktop Client > System Administration > Settings	Labels	The label for the Subtotal field on a Confirmation report.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > All Applications tab		
DefaultPhone1Label	Default Phone 1 Label	Desktop Cli-	Labels	The label for the first phone num-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		ber field under a Contact when creating or modifying a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
DefaultPhone2Label	Default Phone 2 Label	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Labels	The label for the second phone num-ber field under a Contact when cre-ating or modifying a

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
FirstContactTitle	1st Contact Title	Desktop Client > System Administration > Settings >	Labels	The label for the first Contact field on a Reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > Desk-top Cli-ent tab		
GroupTitlePlural	Group Title Plural	Desk-top Cli-	Labels	The plural label of the Group field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients,

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tions tab		
GroupTitleSingular	Group Title Singular	Desktop Client > System Administration	Labels	The singular label of the Group field. The Group field refers to people within your organ-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > All Applications tab		ization who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc.).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
PONumberTitle	PO Number Title Singular	Desktop Client > System Administration > Settings	Labels	The singular label for the PO Number field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > All Applications tab		
PONumberTitlePlural	PO Number Title Plural	Desktop Cli-	Labels	The plural label for the PO Number

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tions tab		
RoomSizeTitle	Room Size Title	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Labels	The label for a Room's Size field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > All Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
RoomTitlePlural	Room Title Plural	Desktop Client > System Administration > Settings >	Labels	The plural label of the Room field. The Room field refers to reservable spaces within your organization.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > All Appli-catio-ns tab		
RoomTitleSingular	Room Title Sin-gular	Desk-top Cli-	Labels	The sin-gular label of the Room field. The

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		Room field refers to reservable spaces within your organization.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tions tab		
SecondContactTitle	2nd Contact Title	Desktop Client > System Administration	Labels	The label for the second Contact field on a Reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SODAttendeeCompanyName	Attendee Company Name	Desktop Client > System Administration > Settings	Labels	Label for the Company field of an attendee within an Attendeestype Category.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
SODAttendeeEmailAddress	Attendee Email Address	Desktop Cli-	Labels	Label for the Email Address

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		field of an attendee within an Attendees-type Category.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
SODAttendeeName	Attendee Name	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Labels	Label for the Name field of an attendee within an Attendees-type Cat-egory.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SODAttendeeNotes	Attendee Notes	Desktop Client > System Administration > Settings >	Labels	Label for the Notes field of an attendee within an Attendees-type Category.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > Desk-top Cli-ent tab		
SODAttendeePhone	Attendee Phone	Desk-top Cli-	Labels	Label for the Phone Number field of an

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		attendee within an Attendees-type Category.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
SODAttendeeVisitor	Attendee Visitor	Desktop Client > System Administration	Labels	Label for the Visitor field of an attendee within an Attendees-type Category.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CheckNumberTitle	Check Number Title	Desktop Client > System Administration > Settings	Labels	The label for the Check No. field within a Transaction.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
EventCoordinatorTitle	Event Coordinator Title	Desktop Cli-	Labels	The label for the Event

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		Coordinator field on a Reservation or Group.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
ExternalReferenceTitle	External Refer-ence Title	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Labels	The label for the External Reference field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
PaymentTypeTitlePlural	Payment Type Title Plural	Desktop Client > System Administration > Settings >	Labels	The plural label for the Payment Type field within a Transaction.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
PaymentTypeTitleSingular	Payment Type Title Singular	Desktop Cli-	Labels	The singular label for the Payment Type

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		field within a Transaction.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
PhoneFaxLabels	Phone/Fax Labels List	Desktop Client > System Administration	Labels	Options available as a dropdown menu in the Phone 1 and Phone 2 fields when creating or edit-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		ing a Group, a Contact, or a Reservation. Options should be entered as text and separated by semicolons. Default options are Phone, Fax,

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SalesCategoryTitle	Sales Category Title Singular	Desktop Client > System Administration >	Labels	The singular label for the Sales Category field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SalesCategoryTitlePlural	Sales Category Title Plural	Desktop Client > System Administration > Settings	Labels	The plural label for the Sales Category field.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		> Para-mete-rs > Desk-top Cli-ent tab		
SalespersonTitle	Sales-person Title	Desk-top Cli-	Labels	The label for the Sales-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		person field on a Reservation or Group.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
AllowNotificationDeletions	Allow Users To Delete Notifications	Desktop Client > System Administration >	Notifications	When set to “Yes,” allows users to delete notifications from the Dashboard.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
DatesExcludeBuildingClosures	Exclude Building Closures On Notifications	Desktop Client > System Administration > Settings >	Notifications	When set to “No,” building closures are not excluded from notification date calculations.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > Desk-top Cli-ent tab		
DatesEx-cludeWeekends	Exclude Week-ends On Noti-	Desk-top Cli-	Noti-fic-ations	When set to “No,” week-ends are not

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	fications	ent > System Administration > Settings > Parameters >		excluded from notification date calculations.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
IgnoreNotificationSettingsDays	Ignore Building Closure/Weekend Notification Settings Beyond xx Days	Desktop Client > System Administration	Notifications	Specifies the number of days after which building closures and/or weekends are ignored for notification date

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		calculations.
PAM_AllowCrit-	N/A	N/A	N/A	This para-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
icalBookingChanges				meter will be per-manently enabled and hidden in the June release. See com-ments.
Cal-endarIn-quiryPrintFormat	Calendar Inquiry Print	Desk-top	Repor-ts	Default format for

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Format	Client > System Administration > Settings > Parameter-		the Event Calendar report. Additional formats are configured under Configuration > Other > Calendar Formats.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ktop Cli-ent tab		
CateringDetail	Include Catering Details on Setup Work-sheet	Desk-top Cli-ent > Sys-tem Admi-	Repor-ts	If enabled, Resource Items within Catering-type Cat-egories are displayed on the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		nistration > Settings > Parameters > Desktop Client		Setup Worksheet report.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ConfirmationSummaryRoomDes	Confirmation Summary Room Description Format	Desktop Client > System Administration >	Reports	Determines how room information is displayed when sending the "Summary" format of the Confirmation in

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		an email body text. Options are Building Code + Room Code or Building Code + Room Description.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
ReportRoomDe-scriptionFormat	Room Descrip-tion Format	Desk-top Cli-ent > Sys-tem Admi-nis-tration > Set-tings	Repor-ts	Determines how room information is displayed in all reports. Options are Room Code or Room Description, with or without the Building

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		> Para-mete-rs > Desk-top Cli-ent tab		Code.
SOForm-sNoteCategoryID	Include this Notes Category	Desk-top Cli-	Repor-ts	Determine which Notes-type

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	on Service Order Forms	ent > System Administration > Settings > Parameters >		Category, if any, is included on Service Order reports. Only one Notes-type Category can be selected for all Service Orders.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
SOFormsPrintActivities	Include Activities on Service Order Forms	Desktop Client > System Administration >	Reports	If disabled, Activities-type Categories are not included on Service Order reports.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CascadeBookingLock	Lock Booking Details If Booking Is Locked	Desktop Client > System Administration > Settings >	Reservations	If a booking is locked due to being invoiced or age, booking details within the booking are also locked. If this parameter is disabled, however,

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		the booking details remain editable.
AllowAddToPersonalCalendar	Allow Bookings To Be Added To	Desktop Cli-	Reservations	If enabled, users can select an

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Outlook Personal Calendar	ent > System Administration > Settings > Parameters >		Outlook option in the Navigator, Browser, and Calendar to add bookings to their personal calendars. User must have Outlook

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		oes not cre-ate an ICS file and/or work with other mail exchange systems (e.g., Gmail).
BillingRe-ferenceValidation	Validate Billing Refer-	Desk-top	Reser-vation-s	Validates the Billing

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	ence	Client > System Administration > Settings > Parameter-		Reference entered against the Billing Reference table. Specify No Validation, Valid Only, or Warning for Invalid (Blanks Are Invalid), or Warning for

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ktop Cli-ent tab		Valid).
BookBuild-ingClosedColor	Book Building Closed Color	Desk-top Cli-ent > Sys-tem Admi-	Reser-vation-s	The color that is used in the Reser-vation Book to indicate building closures.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		nistration > Settings > Parameters > Desktop Client		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BookCheckedInColor	Reservation Book 'Checked In' Color	Desktop Client > System Administration >	Reservations	Color of bookings in the Book that have been checked in. Use of this color is controlled in the Book under Options.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BookCheckInNotRequiredColor	Reservation Book 'Room Does Not Require Check In' Color	Desktop Client > System Administration > Settings	Reservations	Color of bookings in the Book that have not been checked in. Use of this color is controlled in the Book under Options.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
BookHolidayColor	Book Holiday Color	Desktop Cli-	Reservations	The color that used in the Reser-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		vation Book to designate special dates.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
BookingLock	Lock Bookings Older Than 'xx' Days	Desktop Client > System Administration >	Reservations	Past bookings beyond this number of days are automatically locked and cannot be edited.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BookNotCheckedInColor	Reservation Book 'Not Checked In' Color	Desktop Client > System Administration > Settings >	Reservations	Color of bookings in the Book located in rooms that do not require check-in. Use of this color is controlled in the Book under Options.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
BookWeekendColor	Book Weekend Color	Desktop Cli-	Reservations	The color that is used in the Reservation Book

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		to designate weekends.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
BuildingDisplay	Building Display	Desk-top Cli-ent > Sys-tem Admi-nis-tration	Reser-vation-s	Indicates how build-ing inform-ation is displayed in reser-vations within the desktop cli-ent—by

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		Building Code (if one exists) or Building Description.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
BuildingHoursValidateOnEventTime	Validation of Building Hours	Desktop Client > System Administration > Settings	Reservations	How Building Hours are validated for new or existing bookings in the desktop client--either by Reserved Time (i.e., with Setup

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		and/or Teardown Time) or Event Time.
KeepVideoConferenceBookingsTogethe	Group Bookings by UTC	Desktop Cli-	Reservations	If enabled, any

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	times and keep together on Video Con-ference Reser-vations	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		changes made to a booking belonging to a Video Conference occurrence cascade to the other related bookings within the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tions tab		s strongly recom-mended that this parameter be enabled if you plan to use EMS for video conference man-agement in multiple

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
FutureWarning	Warn When Booking More Than 'xx' Months in Future	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Reser-vation-s	If a user attempts to create a booking whose date is past x months, a warning will appear. The warning can be

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		bypassed by the user and will not prevent booking creation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
GroupNotificationsDateFormat	Group Notifications/Auto Reports Date Format	Desktop Client > System Administration > Settings	Reservations	Controls how the date appears within Group Notification Emails or Automated Report emails.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
MaxEventNameLength	Max Length for Event	Desktop Cli-	Reservations	The maximum number of

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	Name	ent > Sys-tem Admi-nis-tration > Set-tings > Para-mete-rs >		characters, including spaces, that a user can enter in the Event Name field when cre-ating or edit-ing a new reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tions tab		
LockOccurringReservation	Lock Occurring/Past Reservations For Non-Administrators	Desktop Client > System Administration >	Reservations	If enabled, users without administrator access cannot edit Reservations once a book-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		ing within the Reservation is in the past.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
UpdateBillingInfoOnGroupChg	Update Billing Information When Changing Group	Desktop Client > System Administration > Settings >	Reservations	If set to “Yes,” automatically updates the billing information when a user selects a different group for a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Para-mete-rs > All Appli-catio-ns tab		
PONumberValidation	Validate PO Num-ber	Desk-top Cli-	Reser-vation-s	Validates PO Num-bers

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		entered against the PO Number table. Specify No Validation, Valid Only, or Warning for Invalid (Blanks Are Invalid), or Warning for Invalid

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
RoomDisplay	Room Display	Desktop Client > System Administration	Reservations	Indicates how room information is displayed in reservations within the desktop client—by Room Code

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Desktop Client tab		or Room Description.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ServicesIndicatorExcludesRoomCh	Exclude Room Charge from Services indicator	Desktop Client > System Administration > Settings	Reservations	In various locations in the desktop client (e.g., the Book, the Navigator, and Editing a Booking), a visual indicator is provided

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		when services (i.e., Categories) exist for a booking. If this parameter is enabled, then the "Room Charge" Category is excluded

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
UpdatePricingOnRoomChanges	Update Room Charge When Room Changes	Desktop Client > System Administration >	Reservations	If set to “Yes,” automatically updates the room charge when a user selects a different room for a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > All Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
UseBillingReferenceAllocation	Use Billing Reference Allocation	Desktop Client > System Administration > Settings	Reservations	Enables an EMS user to allocate reservation, booking, or service order charges across multiple Billing Reference numbers by percentage.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
UseCalendarStyles	Use Calendar Styles	Desktop Cli-	Reports	Select Yes or No to enable the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		use of calendar styles on the Event Schedule report and on the Event Calendar report.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		
UsePONum-berAllocation	Use PO Number Allocation	Desk-top Cli-ent > Sys-tem Admi-nis-tration >	Reser-vation-s	Enables an EMS user to allocate reservation, booking, or service order charges across mul-tiple PO

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		Numbers by percentage.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_ReservationComment	Reservation Comment Type on Checkout	Desktop Client > System Administration > Settings >	Create/Manage Reservations	Reservation-level Comment to be displayed in the Reservation Details when creating a Reservation. Com-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Everyday User Applications tab		ment must be configured to Display on Web and include Display Text. Only one Reservation-level Comment per Web

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
				Comment Types.
Vems_Reservations_AllowTempContact	Allow Temporary Contacts	Desktop Client > System Administration >	Create/Manage Reservations	If set to “Yes,” then a user can specify a temporary contact when making a reservation. Temporary

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Everyday User Applications tab		contacts are not saved to the Group record.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Reservations_AttachmentExtensions	Attachments Allowed Extensions	Desktop Client > System Administration > Settings >	Create/Manage Reservations	The allowed attachment types for room requests.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Everyday User Applications tab		
VEMS_Reservations_ShowAltContact	Show 2nd Contact	Desk-	Create/Man-	If set to

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		top Client > System Administration > Settings > Para-	age Reservations	“Yes,” then the 2nd Contact Name, Phone 1, Phone 2, and Email Address fields are displayed in the Reservation Details.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		rs > Everyday User Applications tab		
VEMS_DefaultRatePlanID	Default Pricing Plan	Desktop Cli-	Create/Manage Reser-	Indicates the default pricing plan that is used

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >	vations	to display pricing.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		er Applications tab		
Vems_MakeAreaItsOwnFilter	N/A	N/A	N/A	This parameter will no longer exist in the June release.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
vems_Res_AllowQuickSetupCount	N/A	N/A	N/A	This parameter will no longer exist in the June release.
VEMS_Reservations_AllowAttachments	Attachments Allowed on Room Request	Desktop Client > System	Create/Manage Reservations	Controls whether users can submit an attachment as part of

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Administration > Settings > Parameters > Everyday User		creating a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Reservations_SetupValidationRule	Setup Type Validation Rule	Desktop Client > System Administration > Set-	Create/Manage Reservations	Determines how Setup Type and Attendance are displayed and handled against room capa-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tings > Parameters > Everyday User Applications tab		cities. Four options are available: • No Setup and No Validation: Do not show the Setup Type field and do not validate the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				Attendance value against room min-imum and maximum capacities. • Validate But Don't Show: Do not show the Setup

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				Type field but validate the Attend-ance value against room min-imum and maximum capacities. • Show and Validate: Show the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
				Setup Type field and val-idate the Attendance and Setup Type against all Setup Type and Capa-city pairings for rooms. • Show But Don't Val-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
				idate: Show the Setup Type field but do not validate Setup Type or Attendance.
VEMS_ReservationSource	Reservation Source for New	Desktop Cli-	Create/Manage Reser-	Specify the only reservation source that

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Reservation	ent > System Administration > Settings > Parameters >	vations	a user can select for a reservation.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		er Applications tab		
Vems_ShowRoomPricing	Show Room Pricing	Desktop Client > System	Create/Manage Reservations	If enabled, room pricing will be displayed per the selection in the Default

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Administration > Settings > Parameters > Everyday User		Pricing Plan parameter.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_RequireBookingCancelReson	Require Cancellation Reason	Desktop Client > System Administration >	My Events	If enabled, users must provide a cancellation reason if they opt to cancel a booking. Cancel Reasons

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Everyday User Applications tab		are configured within the desktop client under Configuration > Other > Cancel Reasons, and a Cancel Reason

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Reservations_AllowAddBooking	Allow Add Booking to Reservation	Desktop Client > System Administration >	My Events	If enabled, users can add bookings to existing Reservations.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Everyday User Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Reservations_AllowEditUdfs	Allow Edit UDFs on Reservation	Desktop Client > System Administration > Settings	My Events	If enabled, users can edit User Defined Field values for their existing Reservations.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Everyday User Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Reservations_AllowReservationEdit	Allow Reservation Edits	Desktop Client > System Administration > Settings	My Events	If enabled, a web user to edit reservation-level information on existing reservations--specifically, Event Name, Event Type,

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Everyday User Applications tab		Group and Contact information, billing information, and a Comment (if one exists).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
Check-ResourceInventory	Check Inventory When Using Reser-vation Tools	Desk-top Cli-ent > Sys-tem Admi-nis-tration > Set-tings	Resou-rces	If enabled, resource availability is verified when Book-ing Details are copied, Reser-vations are copied, or the date/-time/room is changed for

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		multiple bookings.
UseResourceSelector	Use Resource Selector	Desktop Cli-	Resources	If enabled, a Resource Selector

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent > System Administration > Settings > Parameters >		window is available when adding Booking Detail Items.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
AutoAdjustServiceOrderTimes	Auto Adjust Service Order Times	Desktop Client > System Administration >	Service Orders	If enabled, Service Order Times are automatically adjusted when a booking's date and/or

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > Desktop Client tab		time is edited. Note: this parameter is not enforced in EMS for Outlook.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CategoryShowExternalService	Show External Service Option on Categories	Desktop Client > System Administration > Settings >	Service Orders	When Set to “Yes,” an External Service field is displayed on the Category dialog box for a Catering category or a Resource w/ Service Orders cat-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		egory.
DefaultSOTimeandCount	Default Service Order Times	Desktop Cli-	Service Orders	When creating a new service,

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	and Count from Booking	ent > System Administration > Settings > Parameters >		sets the default service order times to the event/reserved time. If set to (none), no default service order times are set.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
vems_AutoAdjustServiceOrderTimes	Adjust Service Order Times upon Booking Edit	Desktop Client > System Administration	Services	If set to “Yes,” then Service Order Times are automatically adjusted if the booking time is mod-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Settings > Parameters > Everyday User Applications tab		ified.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Services_AllowEdit	Allow Edit of Services	Desktop Client > System Administration > Settings	Services	If this option is set to “Yes,” users can edit the services they have added to events.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Everyday User Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VEMS_Services_EnforceInventory	Maintain Inventory	Desktop Client > System Administration > Settings	Services	If this option is set to “Yes,” the system notifies the user if an attempt to reserve a resource would cause the resource to be overbooked.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Everyday User Applications tab		The user must then select a new quantity.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Vems_ShowResourcePricing	Show Resource Pricing	Desktop Client > System Administration > Settings	Services	If enabled, resource pricing will be displayed per the selection in the Default Pricing Plan parameter.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Everyday User Applications tab		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
CPIIAAccessOnly	Campus Planning Interface - Use Integrated Authentication Only	Desktop Client > System Administration > Settings	System	Enables Integrated Authentication as the only authentication method for the Campus Planning Interface. The Network ID field

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		must be completed for any client user who will also use the Campus Planning Interface.
DashboardTimerInterval	Dashboard Check	Desktop Cli-	System	Indicates how frequently the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Interval	ent > System Administration > Settings > Parameters >		Dashboard should check for updates. Note: Setting this for more frequent updates might impact application per-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		ent tab		
DisableOnlineHelp	Disable Online Help	Desktop Client > System Administration >	System	If set to “Yes,” then Online Help is not available for the EMS system. (The link Help > Contents is not dis-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		Set-tings > Para-mete-rs > Desk-top Cli-ent tab		played on the EMS main menu.)

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
IAAccessOnly	Use Integrated Authentication Only	Desktop Client > System Administration > Settings >	System	If set to “Yes,” then EMS users are required to manually log-in and authenticate against LDAP.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Parameters > Desktop Client tab		
NetworkIDLoginIgnoreDesktopDomai	NetworkID Login - Ignore	Desktop Cli-	System	Setting to Yes, causes EMS Deskt-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Desktop Client Domain	ent > System Administration > Settings > Parameters >		op Client to ignore the domain when using Integrated Authentication, which is useful if you leverage multiple domains. For

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		ent tab		the domain EMS\user-name, this parameter causes EMS Deskt-op Client to overlook the "EMS" por-tion of the credentials and still enable user

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ServerTimeZone	Server Time Zone	Desktop Client > System Administration > Set-	System	Sets the time zone for the server to the indicated value.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
		tings > Para-mete-rs > Desk-top Cli-ent tab		
VirtualURL	EMS Web Applic-	Desk-	Sys-tem	The Web

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	ation URL	top Client > System Administration > Settings > Para-		App URL that is displayed in emails related to the web app as well as EMS Group Notifications that include cancellation and recon-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		rs > All Applications tab		on links.
AdditionalCompanyNameText	Additional Company Name Display Text for Reports	Desktop Client > System	System	Text to include as a suffix to the organization name in the

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		tem Administration > Settings > Parameters > Desktop		upper-left header of any reports.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
VirtualWebLinkHyperlinkText	EMS Web Application Hyperlink Text	Desktop Client > System Administration >	System	Controls the text for the Web App URL hyperlink in automatic confirmation emails (Configuration >

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Settings > Parameters > All Applications tab		Everyday User Applications > Everyday User Process Templates > Confirmation > Summary tab.).

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
WarnWebUserLimitPercent	Warn within ##% of Everyday User Licensing Limit	Desktop Client > System Administration > Settings	System	Creates a prompt to expert user upon login if # of everyday users is within x% of licensing limit.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		> Parameters > Desktop Client tab		
Vems_AllowUnauthenticatedRequest	Allow Unauthentic-	Desktop	Unauthenticated	If enabled, unau-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONF-IGUR-ED WHE-RE?	AREA	DESCRIPTIO-N
	ated Users to Create Requests	Cli-ent > Sys-tem Admi-nis-tration > Set-tings > Para-	Reque-sts	thenticated users (i.e.,guests) will have the option to request a room. The (unau-thenticated user) Web Process Template

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		Everyday User Applications tab		figured in the desktop client under Configuration > Web > Web Process Templates.
LotusNotesEncoding	Lotus Notes Encoding	Desktop Client >	Email	UNKNOWN

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
		System Administration > Settings > Parameters > Desk-		

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION

EMS Web App Parameters

Note: Text highlighted in blue denotes new parameters added for Version 44.1.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Auto Create Everyday User Account (for Integrated Authentication)	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	An Everyday User account is automatically created via the integrated authentication process if a new user accesses the EMS Everyday User Application.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
On Login Automatically Set Everyday User Time Zone to First Building's Time Zone	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	After an Everyday User logs in, the time zone for the user is set to the time zone for the first building that is stored in the EMS database. If this building, however, is not listed on the Facilities dropdown list, then the time zone is set to the first available time zone on the Time Zone dropdown list, but the user can always select a different value if one is available.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Allow Everyday User to Opt-Out of Automatic Emails	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	Allows Everyday Users to specify if they want to receive any automatic emails (e.g., automatic confirmations or cancellations) from EMS Web App.
Field Used to Authenticate Everyday User	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Authentication	Indicates the field (Email Address, Network ID, or External Reference) that is used to authenticate an Everyday User.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Require Phone during account creation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	Requires the potential everyday user to complete Phone 1 during manual account creation.
Show Billing References Tab on	Desktop Client > System Administration > Settings > Parameters >	Account Management	Displays a Billing References tab when editing a user account.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Edit Account	Everyday User Applications tab		
Default Account Status for Newly-Created User	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Man-agement	Default status (Active or Pending) for new Every-day User accounts, regardless of account cre-ation method.
Default Security Template	Desktop Client > System Administration	Account Man-agement	The default Web Security template that is assigned to new Everyday Users.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
for User	> Settings > Parameters > Everyday User Applications tab		
Portal Authentic-ation Cookie Key	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Authentic-ation	Appropriate variable to be used if Portal Authentic-ation is enabled by your organization and the para-meter Portal Authentic-ation Method is set to "Cookie."
Portal	Desktop Client	Authentic-	Variable to be used if

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Authentication Email Variable	> System Administration > Settings > Parameters > Everyday User Applications tab	ation	Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."
Portal Authentication External Reference Variable	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Authentication	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Portal Authentication Fax Variable	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Authentication	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."
Portal Authentication Method	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Authentication	Method of Portal Authentication to be used, if enabled by your organization. Choices are Form, Server Variable, Session, Querystring, and Cookie.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Portal Authentication Name Variable	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Authentication	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to "ServerVariable."
Portal Authentication Phone Variable	Desktop Client > System Administration > Settings > Parameters >	Authentication	Variable to be used if Portal Authentication is enabled and the parameter Portal Authentication Method is set to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		"ServerVariable."
Portal Authentication Variable	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Authentication	User variable to be compared against the EMS Everyday User External Reference or Network ID fields if your organization has enabled Portal Authentication. This parameter works in tandem with the choice selected for the parameter Portal Authentication Method (Form, Session, Server-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Variable, Cookie, Querystring).
Default Rounding Method for Hourly Pricing	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Billing	Allows you to specify the time increment, from one minute to sixty minutes, by which to round the time for hourly pricing.
Ignore Room Display to Everyday Users	Desktop Client > System Administration > Settings > Parameters >	Schedule View	All bookings for all rooms are considered "Private" if this parameter is enabled

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Flag	Everyday User Applications tab		
Room Name Format in Browse Locations	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Locations	Determines how room information is formatted in Browse Locations. Options are Room Description or Room Code
Display Setup/Te-ardown	Desktop Client > System Administration	Schedule View	If room has setup/tear-down times they are always shown irrespective

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Times	> Settings > Parameters > Everyday User Applications tab		of this parameter. If disabled, then booking level setup/teardown time is not shown to the user .
Event Information to Display in Booking on Schedule View	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Schedule View	Determines what information should show in the free/busy bar in the Book. Options include: None, Event Name or Group Name.
Start	Desktop Client	Schedule	Determines the start time

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Time on Schedule View	> System Administration > Settings > Parameters > Everyday User Applications tab	View	for the grid.
Make Add to Personal Calendar Link Appear	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Booking Details	If enabled, the Add to Personal Calendar link is displayed when the Everyday User views the event details in either Reservation Summary or Booking Details.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Show Social Net-working Options	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Booking Details	If set to “Yes,” then dis-plays links to various social networking sites when a user views the details of a booking.
Collapse Related Bookings to Start Times on Weekly/M-onthly	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Browse Events	If more than one booking within a reservation takes place on the same day, enabling this parameter will collapse the bookings into a single entries per Start Time. Only applies

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Views	tab		to Weekly and Daily view.
Browse Event Default Display Format	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	Determines the initial format in which the Browse Events function displays information. Options are: Daily, Weekly, Monthly.
Drop Events from Daily View After	Desktop Client > System Administration > Settings > Parameters >	Browse Events	If enabled, events from the past will no longer appear in Browse Events.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
They Occur	Everyday User Applications tab		
Maximum Number of Event-s/Day to Display	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	Controls the number of events that are available for display, per day, in the daily views of the Browse Events function. Note: In some circumstances, you must click a link to see additional events.
Maximum Number of Event-	Desktop Client > System Administration	Browse Events	Controls the number of events that are available for display, per day, in the

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
s/Day to Display in Monthly View	> Settings > Parameters > Everyday User Applications tab		monthly views of the Browse Events function. Note: In some circumstances, you must click a link to see additional events.
Maximum Number of Events/Day to Display in Weekly View	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	Controls the number of events that are available for display, per day, in the weekly views of the Browse Events function. Note: In some circumstances, you must

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			click a link to see additional events.
Show End Time in Browse Events	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	If this option is set to No, only start time is shown in Browse Events.
Show Group Name in Browse	Desktop Client > System Administration > Settings >	Browse Events	If set to Yes, then the name of the group that is holding an event is shown in Browse Events.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Events	Parameters > Everyday User Applications tab		
Show Group Type Filter in Browse Events	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	If set to “Yes,” then the group type filter is an option in Browse Events.
Show Location	Desktop Client > System	Browse Events	If set to “Yes,” then the event location is displayed

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
on Browse Events	Administration > Settings > Parameters > Everyday User Applications tab		in the calendar view on the Browse Events page.
Show Room Type Filter in Browse Events	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Browse Events	If set to “Yes,” then a Room Type filter is displayed on the Browse Events page.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Location Format	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	General	Determines how location information is displayed in Browse Events and Create Reservation (List View). Options are Room Code, Room Description, Building Code - Room Code, Building Code - Room Description, Building Description - Room Code, Building Description - Room Description, Building Description.
Allow Email My	Desktop Client > System	Account Man-	Allows Everyday Users to email their passwords to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Password	Administration > Settings > Parameters > Everyday User Applications tab	agement	themselves.
Account to Use for Sending Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	The email account against which outgoing email from EMS is authenticated. Only required if the SMTP mail server requires authentication.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Password of Email Account	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	The password for the email account. Only required if the SMTP mail server requires authentication.
Name of Email Sender	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Email	Indicates the "From" name in the reservation summary email generated when an everyday user creates a reservation. Parameter Send Request

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		Summary upon Submit must be enabled, and a reservation summary email must be configured (under Configuration > Everyday User Applications > Everyday User Process Templates > highlight the template and select Confirmation).
Email Address of Sender	Desktop Client > System Administration > Settings > Parameters >	Email	This entry indicates the “From” email address in the reservation summary email that is generated when a Everyday User

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		submits a reservation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured.
Name or IP Address of SMTP Server	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	SMTP mail server used solely for emails related to everyday user application functionality. This mail server does not apply to emails generated within the desktop client or by any email notification service.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
SMTP Server Port	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	The default email port for your SMTP server.
Format for Request Summary	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Email	Specify a detailed or summarized report for the reservation summary email that is generated when a Everyday User submits a reservation. Parameter Send Request

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		Summary upon Submit must be enabled, and a reservation summary email must be configured.
Send Request Summary upon Submit	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email	Determines whether reservation summary information is emailed to the Everyday Users when a reservation is submitted. A reservation summary email must be configured.
Send Confirmation	Desktop Client > System	Email	Sends the reservation summary if the reser-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
on Cancel	Administration > Settings > Parameters > Everyday User Applications tab		vation or a booking is canceled.
Default Subject for Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email	This entry appears in the Subject line of email the reservation summary email that is generated when a Everyday User submits a reservation. Parameter Send Request Summary upon Submit must be enabled, and a

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			reservation summary email must be configured. (Provide link or reference to where email is configured.)
Floor Plan Web Service URL	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Floor Plan	Used for the Floor Plan module. URL address for the floor mapping web service.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Allow Desktop Client User to Change External Reference	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Groups & Contacts	If enabled, a desktop client user can change the External Reference values on Group and Contact records. Customers using HR Toolkit are strongly encouraged to disable this parameter so as not to disrupt the automatic association of these records with Everyday User records.
Everyday Users linked to	Desktop Client > System Administration	Groups & Contacts	Links group and Everyday User records if group records are defined as

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Groups via External Refer-ence	> Settings > Parameters > All Applications tab		individual employees (i.e., not departments) in your system. When making a new reservation in EMS, the Everyday User field is automatically populated based on the group selec-ted.
Area Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The plural label for the Area field.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Area Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label for the Area field.
Billing Refer-ence Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label for the Billing Reference field.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Billing Reference Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The plural label for the Billing Reference field.
Building Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The plural label for the Building field.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Building Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label for the Building field.
Confirmation Grand Total Title	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The label for the Grand Total field on a Confirmation report.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Con-firmation Subtotal Title	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The label for the Subtotal field on a Confirmation report.
Default Phone 1 Label	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	The label for the first phone number field under a Contact when creating or modifying a reser-vation.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Default Phone 2 Label	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	The label for the second phone number field under a Contact when creating or modifying a reservation.
1st Contact Title	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	The label for the first Contact field on a Reservation.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Group Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The plural label of the Group field. The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc.).
Group Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label of the Group field. The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Customers, etc.).
PO Number Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label for the PO Number field.
PO Number Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications	Labels	The plural label for the PO Number field.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Room Size Title	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The label for a Room's Size field.
Room Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications	Labels	The plural label of the Room field. The Room field refers to reservable spaces within your organization.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Room Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Labels	The singular label of the Room field. The Room field refers to reservable spaces within your organization.
2nd Contact Title	Desktop Client > System Administration > Settings > Parameters > Desktop Client	Labels	The label for the second Contact field on a Reservation.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Attendee Company Name	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	Label for the Company field of an attendee within an Attendees-type Category.
Attendee Email Address	Desktop Client > System Administration > Settings > Parameters > Desktop Client	Labels	Label for the Email Address field of an attendee within an Attendees-type Category.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Attendee Name	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	Label for the Name field of an attendee within an Attendees-type Category.
Attendee Notes	Desktop Client > System Administration > Settings > Parameters > Desktop Client	Labels	Label for the Notes field of an attendee within an Attendees-type Category.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Attendee Phone	Desktop Client > System Administration > Settings > Parameters > Desktop Client tab	Labels	Label for the Phone Number field of an attendee within an Attendees-type Category.
Attendee Visitor	Desktop Client > System Administration > Settings > Parameters > Desktop Client	Labels	Label for the Visitor field of an attendee within an Attendees-type Category.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Event Title Plural	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Labels	If updating this parameter, it is recommended that the parameter Event Type Singular is also updated.
Event Title Singular	Desktop Client > System Administration > Settings > Parameters >	Labels	If updating this parameter, it is recommended that the parameter Event Type Plural is also updated.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		
Label for "Private" Bookings on Schedule View	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Schedule View	The default label in Browse Locations for events that do not display on web (i.e., the bookings' Event Type and/or Status are not configured to display on the web).
Label for Login box	Desktop Client > System Administration	Authentication	The label for the User ID field on the Login page.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	> Settings > Parameters > Everyday User Applications tab		
This determines whether to authenticate with Ldap.	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	Determines whether to authenticate users via LDAP.
Ldap Authentic-	EMS Web App > LDAPCon-	LDAP	LDAP Authentication

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ation type.	figuration.aspx > Security tab		Type for your environment. Some directory services don't implement Secure binding. FastBind is a pretty common authentication type. Options are None, Secure, Sealing, Anonymous, Encryption/SecureSocketsLayer, Delegation, FastBind, ReadonlyServer, ServerBind, and Signing.
Certificate	EMS Web App > LDAPCon-	LDAP	Certificate Path. Path to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
path to used during SSL Verification	figuration.aspx > Communication Options tab		the certificate file to be used during SSL (if empty will trust all certificates). Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
List of	EMS Web App	LDAP	Comma-Separated List of

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
domains to show on login page	> LDAPConfiguration.aspx > Security tab		Domains: Skip this step if your organization uses a single domain or does not require domain to be specified. Otherwise, provide a comma-separated list of your domains.
Domain to append to users	EMS Web App > LDAPConfiguration.aspx > Core Properties tab	LDAP	Domain to append to users. May be necessary if your web server is in a different domain then your users'. Note: The other tabs (Communication Options, Core Properties,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
LDAP Full Account/User ID	EMS Web App > LDAPConfiguration.aspx > Non-AD Config tab	LDAP	Full LDAP User ID Format. Do not supply this unless a full path is needed to authenticate. Example: cn={0},ouu=staff,o=yourdomain. {0} will be replaced with user

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			input. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
LDAP Group Category Name	EMS Web App > LDAPConfiguration.aspx > Non-AD Con-	LDAP	LDAP Group Category. After binding to your directory service this prop-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	fig tab		erty should enable results to be filtered down to groups. For example, if the filter should be "objectClass-s=groupOfNames" then this property should be groupOfNames. Common properties are: group (Active Directory), groupOfNames (eDirectory, Domino). Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries)

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			special circumstances arise with unique configurations of LDAP.
Ldap Group Members Attribute Name.	EMS Web App > LDAPConfiguration.aspx > Non-AD Config tab	LDAP	After binding to the group object, this should be the property that contains a single member of the group. For example if the member property of your groups are "member=jdoe" then this property should be member. Common properties are: member (Active Directory,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			eDirectory, Domino). Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Ldap Group Member	EMS Web App > LDAPConfiguration.aspx	LDAP	LDAP Group Member

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
User Name Attribute.	> Non-AD Config tab		User Name Attribute. The property of the user object which should be compared to member property of the group in order determine group membership. For example: if your directory service stores members like "member=cn=user,o=Domain", this property should be used. Note: The other tabs (Communication Options, Core Properties,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
LDAP Group Name	EMS Web App > LDAPConfiguration.aspx > Non-AD Config tab	LDAP	LDAP Group Name. After binding to your directory service, this property should allow us to get a group object by applying this filter with the group name. For example if the query should be (& (|

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			(objectClass-s=groupOfNames))(|cn-n=administrators)),) then this property should be used. Common properties are: name (Active Dir-ectory), cn (eDirectory, Domino). Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Depart-ment when special cir-cumstances arise with

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Domain\-User to query Active Directory	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	The user ID of the account EMS Web App will use when contacting Directory Services. In the LDAP Domain\User field, enter a Domain User account that has rights to query LDAP (example - YourDomain\User)
Password of LDAP user (encryp-	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	In the Password field, enter a valid Password for the User Account entered in the previous step. Sup-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ted)			ply only if you are updating the password. (Note: It will be stored in an encrypted format)
Path used to query Active Directory	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	Path for LDAP Query. Example: LDAP://yourdomain.com (Note: You probably need to have "LDAP" in all caps). If using Communication Options, leave the LDAP:// off (i.e. youdomain.com:port)

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
LDAP name property to query in Active Directory	EMS Web App > LDAPConfiguration.aspx > Core Properties tab	LDAP	LDAP Name Property. Examples: displayname, distinguishedname, name, givenname. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
LDAP	EMS Web App	LDAP	LDAP Phone Property.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
phone property to query in Active Directory	> LDAPConfiguration.aspx > Core Properties tab		Examples: telephonenumber, homephone, facimiletelephonenumber. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Ldap protocol Authentication type.	EMS Web App > LDAPConfiguration.aspx > Communication Options tab	LDAP	Authentication Type. Authentication to use during binding process (Basic is most common). Choices are Anonymous, Basic, Negotiate, Ntlm, Digest, Sicily, Dpa, Msn, External, and Kerebos. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special cir-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			cumstances arise with unique configurations of LDAP.
Search Fitler to use when finding token groups	EMS Web App > LDAPConfiguration.aspx > Communication Options tab	LDAP	Group Search Filter. Active Directory Only. Filter to use when loading Token Groups for a user ---i.e (&(objectClass=Person)(objectClass=user)) ---. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Root OU to bind during searches	EMS Web App > LDAPConfiguration.aspx > Communication Options tab	LDAP	Search Root. OU for the root of the search (i.e. DC=youdomain,DC=com or o=LDAPRoot). Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Support Department when special circumstances arise with unique configurations of LDAP.
Search Filter to use when locating a user	EMS Web App > LDAPConfiguration.aspx > Communication Options tab	LDAP	User Search Filter. Filter to use when looking for a user ---i.e. (& (objectClass=Person)(SAMAccountName={0})) or (& (objectClass=Person) (uid={0})) --- {0} will be replaced with user input. Note: The other tabs

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			(Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Ldap protocol version.	EMS Web App > LDAPConfiguration.aspx > Communication	LDAP	Protocol Version. Current version should be 3. Note: The other tabs (Communication Options, Core Properties, Non-AD

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Options tab		Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Ldap query filter to get security groups	EMS Web App > LDAPConfiguration.aspx > LDAP Queries tab	LDAP	LDAP query for security groups. {0} will be replaced by user input. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Quer-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			ies) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Using Active Directory	EMS Web App > LDAPConfiguration.aspx > Core Properties tab	LDAP	Using Active Directory. If checked, instructs EMS Web App to use Active Directory attributes during queries. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Should advanced communication options be used	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	Use advanced communication options (requires Communication Options configuration, typically NOT required for Active Directory). Skip this step for Active Directory environments. Enabling

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			this checkbox requires that you complete the settings on the Communication Options tab.
This determines whether to use LDAP to assign process templates	EMS Web App > LDAPConfiguration.aspx > Security tab	LDAP	Select the Use LDAP to assign Process Templates checkbox if LDAP will be used to assign Web Process Templates to your Everyday Users. Uncheck this to just use LDAP for authentication.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
LDAP Account/User ID	EMS Web App > LDAPConfiguration.aspx > Non-AD Config tab	LDAP	LDAP Account/User ID Property. After binding to your directory service, this property should allow us to load a single user. For example if the filter should be: "sameaccountname=xxxx" then this property should be samaccountname. Common properties are: samaccountname (Active Directory), cn (eDirectory, Domino). Note: The other tabs (Communication

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Ldap query to get users	EMS Web App > LDAPConfiguration.aspx > LDAP Queries tab	LDAP	LDAP Query to find users. {0} will be replaced by user input. Note: The other tabs (Communication Options, Core Properties, Non-AD Con-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			fig and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Ldap query to get users	EMS Web App > LDAPConfiguration.aspx > LDAP Queries tab	LDAP	LDAP query to find users with space. {0} will be replaced by user supplied input. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
Should SSL be used when using advanced options	EMS Web App > LDAPConfiguration.aspx > Communication Options tab	LDAP	Use SSL. Will force communication to use SSL. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			when special circumstances arise with unique configurations of LDAP.
tblWebUser field to use when getting LDAP Groups	EMS Web App > LDAPConfiguration.aspx > Core Properties tab	LDAP	Field to use for LDAP Group Lookup. Choices are Login Name, External Reference, and Network ID. If using LDAP solely for template assignment, this allows you to specify a value other than the provided login name to use when looking up

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			group membership. Note: The other tabs (Communication Options, Core Properties, Non-AD Config and LDAP Queries) should only be edited with assistance from our Support Department when special circumstances arise with unique configurations of LDAP.
True if allowing attachments	Exchange Integration Web Service > PAMCon-	Exchange Integration	Allows users to add and send attachments to meeting attendees when creating a reservation on

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	fig.aspx > Message tab		EMS Web App.
Pipe delimited list of properties to display	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	Exchange Integration	Directory Service Properties for data. Available options: Department, JobTitle, OfficeLocation, CompanyName, Manager, AssistantName
Pipe delimited list of labels for the prop-	Exchange Integration Web Service > PAMConfig.aspx >	Exchange Integration	Additional Columns to Display (DisplayName and Email always display). Available options: Department, JobTitle,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
erties	Account Info tab		OfficeLocation, CompanyName, Manager, AssistantName
Urls to follow during autodiscovery	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	Exchange Integration	Follow Autodiscover redirects to the these URLs. Values are (|) delimited.
PAM method to use to build cal-	Exchange Integration Web Service > PAMCon-	Exchange Integration	Where to locate your portion of the OWA path. Choices are LDAP Property, Left portion of email,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
endar path	fig.aspx > Exchange 2000/2003 tab		or Full Email Address (supported in 2003).
Cal-endaring Provider	Exchange Integration Web Service > PAMCon-fig.aspx > Account Info tab	Exchang-e Integ-ration	Provider. Choose Exchange Web Services for Exchange 2007 (SP1 or later), Exchange 2010 and for all coexistence (Exchange 2003 w/ Exchange 2007 /w Exchange 2010 or Exchange 2007 /w Exchange 2010) scen-arios.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
URL to Exchange Web Service	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	Exchange Integration	Supply this value only if you cannot use AutoDiscover for some reason. NOTE: It is considered a best practice to use AutoDiscover when accessing the Exchange Web Services. If you do not check the box ".. utilize AutoDiscover to locate the best Client Access Server for the user...", you MUST fill in the URL to Exchange Web Services field.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Password of exchange user (encrypted)	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	Password (Provide only if updating). Within the Authentication Information section, enter your PAM Account User Name and Password. The User Name should be prefixed with your domain (example – YourDomain\PAM Account.)
Domain\user of user to authenticate with	Exchange Integration Web Service > PAMConfig.aspx >	PAM	Username. This is the account which will make the requests. Within the Authentication Information section, enter your

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Account Info tab		PAM Account User Name and Password. The User Name should be prefixed with your domain (example - YourDomain\PAM Account.)
Authentication Type of LDAP connection	Exchange Integration Web Service > PAMConfig.aspx > Tab	PAM	
Domain\User to	Exchange Integration	PAM	

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
query Active Directory	Web Service > PAMConfig.aspx > Tab		
Query to use for free busy lookup	Exchange Integration Web Service > PAMConfig.aspx > Exchange 2000/2003 tab	PAM	LDAP query to find attendees (including currently logged in user).
Query to use for free busy lookup	Exchange Integration Web Service > PAMCon-	PAM	LDAP query to find attendees when there is a space in the search string.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
with space	fig.aspx > Exchange 2000/2003 tab		
Format to user for building calendar path	Exchange Integration Web Service > PAMCon-fig.aspx > Exchange 2000/2003 tab	PAM	Active Directory Mailbox Property Format: i.e.{0} or {0}_[1}
Active Dir-ectory Prop-erties to	Exchange Integration Web Service > PAMCon-	PAM	Active Directory Mailbox Properties, i.e. Mail-nickname or givenname|sn

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
replace in format	fig.aspx > Exchange 2000/2003 tab		
Password of LDAP user (encrypted)	Exchange Integration Web Service > PAMConfig.aspx > Tab	PAM	
Path used to query Active Directory	Exchange Integration Web Service > PAMConfig.aspx > Exchange	PAM	Path to LDAP, i.e. LDAP://yourcompany.com

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	2000/2003 tab		
Query to use for mailbox lookup	Exchange Integration Web Service > PAMConfig.aspx > Tab	PAM	
Where to call for free time	Exchange Integration Web Service > PAMConfig.aspx > Lotus tab	PAM	HTTP path to the Notes Agent. Fully qualified http path to the agent i.e. http://YourDominoServer-/EmsNDNR.nsf/
True if	Exchange	PAM	If enabled, debugging

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
agents should write debug info to console	Integration Web Service > PAMConfig.aspx > Lotus tab		agents should write debug info to console
Where to call for free time	Exchange Integration Web Service > PAMConfig.aspx > Lotus tab	PAM	Where to call for free time.
True if agents	Exchange Integration	PAM	Check this option to display debugging inform-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
should generate debug info	Web Service > PAMCon-fig.aspx > Lotus tab		ation. Should only be enabled when attempting to debug.
Authentic-ation Type of LDAP con-nection	Exchange Integration Web Service > PAMCon-fig.aspx > Lotus tab	PAM	Determines the LDAP authentication method when looking-up an attendee.
Query to use for free busy lookup	Exchange Integration Web Service > PAMCon-	PAM	LDAP query to find attendees (including cur-rently logged in user). This query is only to be

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	fig.aspx > Lotus tab		edited when special circumstances arise with unique configurations of Lotus Notes and LDAP. If you choose to edit this query, you should do so only if you are well-versed in developing and editing LDAP queries. Before you begin editing a query, be sure to make a copy of the original query text.
Query to use for free busy	Exchange Integration Web Service >	PAM	LDAP query to find attendees when there is a

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
lookup with space	PAMConfig.aspx > Lotus tab		space in the search string. This query is only to be edited when special circumstances arise with unique configurations of Lotus Notes and LDAP. If you choose to edit this query, you should do so only if you are well-versed in developing and editing LDAP queries. Before you begin editing a query, be sure to make a copy of the original query text.
Path used	Exchange	PAM	Path to LDAP (e.g.,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
to query Directory Service	Integration Web Service > PAMConfig.aspx > Lotus tab		LDAP://YourCompany.com:10010)
Password of Lotus user (encrypted)	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	
Session authen-	Exchange Integration	PAM	

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
tication format	Web Service > PAMCon-fig.aspx > Lotus tab		
True lotus agent is running with SSL	Exchange Integration Web Service > PAMCon-fig.aspx > Lotus tab	PAM	
True to use LDAP for attendee	Exchange Integration Web Service > PAMCon-	PAM	

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
lookups	fig.aspx > Lotus tab		
Password of Lotus user (encrypted)	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	
True if domino is running with session	Exchange Integration Web Service > PAMConfig.aspx >	PAM	

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
authen-tication	Lotus tab		
PAM Max-imum size of attach-ment to allow	Exchange Integration Web Service > PAMCon-fig.aspx > Mes-sage tab	PAM	If attachments are allowed, this parameter sets the maximum file size allowed for an attach-ment. Attachment upload by mobile not allowed. This setting does not apply to reservations made directly in EMS for Outlook.
True is user mail-	Exchange Integration	PAM	Check this box if your Exchange environment

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
boxes exist on both 2003 and 2007/2010 servers	Web Service > PAMConfig.aspx > Account Info tab		has mailboxes on 2000/2003 and 2007/2010 servers. If you are in Mixed Mode, AutoDiscover MUST be utilized.
Message Added to meeting request	Exchange Integration Web Service > PAMConfig.aspx > Message tab	PAM	Message appended to the bottom of the appointment body. This message is seen by all users.
PAM number of res-	Exchange Integration	PAM	

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ults to return in lookup	Web Service > PAMCon-fig.aspx > Tab		
Path used for out-look web access	Exchange Integration Web Service > PAMCon-fig.aspx > Exchange 2000/2003 tab	PAM	Outlook Web Access (OWA) URL (make sure you end with a slash) i.e. https://-mail.dea.com/exchange/
True if Outlook web access	Exchange Integration Web Service > PAMCon-	PAM	Select this option if your Outlook web access uses Forms-Based Authentic-ation (FBA).

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
uses forms based authen-tication	fig.aspx > Exchange 2000/2003 tab		
	Exchange Integration Web Service > PAMCon-fig.aspx > Account Info tab	PAM	Select the Authentication Type. Options are: Anonymous (no cre-dentials passed), Default Credentials (security con-text of running application (App Pool, EMS Client or Outlook), Specify Account (custom account you spe-cify). Note: Please contact

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Customer Support (or a member of the Professional Services group if you are working with one) to discuss the configuration process for this option.
Domain\user of user to authenticate to PAM with	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	Custom account to use to authenticate to the Exchange Integration Web Service.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Password of account to call PAM with (encrypted)	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	Provide this password only if updating.
The text to display above the details link	Exchange Integration Web Service > PAMConfig.aspx > Message tab	PAM	Message added to the appointment body, above a link that takes a user to a view-only EMS Web App page for the appointment. This message is seen by all users.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
The text to display above the edit link	Exchange Integration Web Service > PAMConfig.aspx > Message tab	PAM	Message added to the appointment body, above a link that takes the meeting organizer to the EMS Web App Reservation Summary page for that reservation. This message is seen by all users, but only the meeting organizer can access the Reservation Summary page to make changes.
Use App Pool Identity for	Exchange Integration Web Service >	PAM	Use application pool identity when authenticating to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
authen-tication	PAMCon-fig.aspx > Account Info tab		calendaring service (only applicable for Exchange 2007/2010 environments, all other situations REQUIRE username and password). This option allows you to set the PAM Account credentials at the Application Pool level instead of storing the cre-dentials in the EMS data-base (which is done by inputting the PAM Account credentials on the PAMConfig.aspx

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			box to enable users to appoint delegates. Using this method allows your organization to maintain absolute control - only IIS applications running in the newly created application pool can run as the PAM Account.
True to use AutoDis-cover to locate CAS	Exchange Integration Web Service > PAMCon-fig.aspx > Account Info	PAM	Select ".. utilize AutoDis-cover to locate the best Client Access Server for the user..." to locate the best Client Access Server for the user. If you are in

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		Mixed Mode, AutoDiscover MUST be utilized. Note: if you do not check this box, you MUST fill in the URL to Exchange Web Services field.
Use EWS Impersonation for PAM	Exchange Integration Web Service > PAMConfig.aspx > Account Info tab	PAM	Select this option if delegates should be able to access mailboxes. If not, then FULL ACCESS or DELEGATE (at least Editor) access must be granted to the account for ALL mailboxes.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Name of calendar folder (typically calendar)	Exchange Integration Web Service > PAMConfig.aspx > Tab	PAM	
Path to web dav root	Exchange Integration Web Service > PAMConfig.aspx > Tab	PAM	
N/A	N/A	N/A	This parameter will be permanently enabled and hidden in the June release. See comments.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Exchange Integration Web Service URL	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Integration to Microsoft Exchange	The URL to the optional Integration to Exchange module. If Exchange Integration is enabled, this URL is inserted into the links within meeting appointments generated by the EMS Web App or EMS for Outlook.
Lock Booking Details If Booking Is Locked	Desktop Client > System Administration > Settings > Parameters > Desktop Client	Reservations	If a booking is locked due to being invoiced or age, booking details within the booking are also locked. If this parameter is disabled, however, the booking

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		details remain editable.
Group Bookings by UTC times and keep together on Video Conference Reservations	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Reservations	If enabled, any changes made to a booking belonging to a Video Conference occurrence cascade to the other related bookings within the occurrence. It is strongly recommended that this parameter be enabled if you plan to use EMS for video conference management in multiple rooms.
Max	Desktop Client	Reser-	The maximum number of

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Length for Event Name	> System Administration > Settings > Parameters > All Applications tab	vations	characters, including spaces, that a user can enter in the Event Name field when creating or editing a new reservation.
Update Billing Information When Changing Group	Desktop Client > System Administration > Settings > Parameters > All Applications tab	Reservations	If set to “Yes,” automatically updates the billing information when a user selects a different group for a reservation.
Update	Desktop Client	Reser-	If set to “Yes,” auto-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Room Charge When Room Changes	> System Administration > Settings > Parameters > All Applications tab	vations	matically updates the room charge when a user selects a different room for a reservation.
Show Billing Refer-ence on Reser-vation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/M-anage Reser-vations	If set to “Yes,” the Billing Reference is displayed in the Reservation Details.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Billing Reference Validation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Controls what options exist for requiring and validating Billing References. Validation occurs against pre-configured Billing References in the desktop client, either on a Group record or in the global Billing References list under Configuration > Billing > Billing References.
PO Number Validation	Desktop Client > System Administration	Create/Manage Reser-	Controls what options exist for requiring and validating PO Numbers. Val-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	> Settings > Parameters > Everyday User Applications tab	vations	idation occurs against pre-configured PO Numbers in the desktop client, either on a Group record or in the global PO Numbers list under Configuration > Billing > PO Numbers.
Reservation Comment Type on Checkout	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Create/Manage Reservations	Reservation-level Comment to be displayed in the Reservation Details when creating a Reservation. Comment must be configured to Display on Web and include Display

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		Text. Only one Reservation-level Comment per Web Process Template allowed. Comments are configured in the desktop client under Configuration > Other > Comment Types.
Allow Temporary Contacts	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Create/Manage Reservations	If set to “Yes,” then a user can specify a temporary contact when making a reservation. Temporary contacts are not saved to the Group record.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Attachments Allowed Extensions	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	The allowed attachment types for room requests.
Require Contact Email	Desktop Client > System Administration > Settings > Parameters >	Create/Manage Reservations	Specify No or Yes to require contact email at checkout.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		
Require Contact Phone	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Specify No or Yes to require a contact phone number at checkout.
Show 2nd Contact	Desktop Client > System Administration	Create/Manage Reser-	If set to “Yes,” then the 2nd Contact Name, Phone 1, Phone 2, and

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	> Settings > Parameters > Everyday User Applications tab	vations	Email Address fields are displayed in the Reservation Details.
Allow Billing Reference Lookup	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If set to “Yes,” a user can look up pre-configured Billing References in the Reservation Details. Pre-configured Billing References can exist in the desktop client on a Group record or in the global Billing References list under Configuration >

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Billing > Billing References.
Show PO Number on Reservation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If set to “Yes,” the PO Number is displayed in the Reservation Details.
Allow PO Number Lookup	Desktop Client > System Administration > Settings >	Create/Manage Reservations	If set to “Yes,” a user can look up pre-configured PO Numbers in the Reservation Details. Pre-con-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Parameters > Everyday User Applications tab		figured PO Numbers can exist in the desktop client on the Group record or in the global PO Numbers list under Configuration > Billing > PO Numbers.
Enable "Add to Calendar" Checkbox by Default	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Integration to Microsoft Exchange	For templates with Exchange integration. If enabled, the Add to Calendar checkbox is ticked by default which will add automatically add new bookings to the user's Outlook calendar.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Display Location Filters and Room Availability to Unauthenticated Users	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Unauthenticated Requests	If enabled, an unauthenticated user can search for rooms and see room availability.
Allow Unauthenticated	Desktop Client > System Administration > Settings >	Unauthenticated Requests	If enabled, an unauthenticated user can specify a room as part of their request.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Users to Search for Room by Name	Parameters > Everyday User Applications tab		
Exclude Closures From Date Calculations	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If set to Yes, closures are not taken into account on booking rule date calculations.
Exclude Week-	Desktop Client > System	Create/Manage	If set to Yes, weekends are not taken into account

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
ends From Date Calculations	Administration > Settings > Parameters > Everyday User Applications tab	Reservations	on booking date calculations.
Default Pricing Plan	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Indicates the default pricing plan that is used to display pricing.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Default Room Availability View	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	When a user searches for available rooms, this parameter drives the default display. Options are Grid, List or Floor Map.
Allow Single-Day Requests for Unavailable	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Integration to Microsoft Exchange	For templates with Exchange integration. If enabled, a user can make a single-day booking in an unavailable room. If disabled, a user must choose an available room in order

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Rooms	tab		to make a single-day booking.
Override Default Room Setup/Teardown Times	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If set to “Yes,” the default setup/teardown times defined for a room are ignored and the values for Setup Time in Minutes for All Rooms and Teardown Time in Minutes for All Rooms parameters are used instead. These parameters are usually configured for videoconference bookings where setup/tear-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			down times for participating rooms may differ.
Setup Time in Minutes For All Rooms	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If enabled, the default setup time defined for a room is ignored and this parameter's value is used instead. The parameter Override Default Room Setup/Teardown Times must also be enabled. This parameter is usually configured for videoconference reservations where setup/teardown

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			times for participating rooms may differ.
Teardown Time in Minutes For All Rooms	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If enabled, the default teardown time defined for a room is ignored and this parameter's value is used instead. The parameter Override Default Room Setup/Teardown Times must also be enabled. This parameter is usually configured for videoconference reservations where setup/teardown times for participating

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			rooms may differ.
Attachments Allowed on Room Request	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Controls whether users can submit an attachment as part of creating a reservation.
Default Value for Attendance	Desktop Client > System Administration > Settings > Parameters >	Create/Manage Reservations	A default value for attendance when users make a room request.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		
Hide Daily Recur-rence Option	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/M-anage Reser-vations	Hide the daily recurrence option on the Room Request page.
Hide Monthly Recur-	Desktop Client > System Administration	Create/M-anage Reser-	Hide the monthly recur-rence option on the Room Request page.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
rence Option	> Settings > Parameters > Everyday User Applications tab	vations	
Hide Random Recurrence Option	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Hide the random recurrence option on the Room Request page.
Hide	Desktop Client	Create/M-	Hide the weekly recur-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Weekly Recurrence Option	> System Administration > Settings > Parameters > Everyday User Applications tab	anage Reservations	rence option on the Room Request page.
Number of Available Rooms on Search	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Specify the number of available rooms listed at a time in search results (in EMS Web App and EMS Mobile App; note that this parameter is ignored for EMS for Outlook).

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Sequence of Available Rooms upon Search	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Schedule View	Option for how rooms are sorted when a user is viewing rooms in the schedule view. Choices are alphabetically by Room Description or numerically by Book Sequence values configured on the Rooms.
Setup Type Validation Rule	Desktop Client > System Administration > Settings > Parameters > Everyday User	Create/Manage Reservations	Determines how Setup Type and Attendance are displayed and handled against room capacities. Four options are avail-

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Applications tab		able: • No Setup and No Validation: Do not show the Setup Type field and do not validate the Attendance value against room minimum and maximum capacities. • Validate But Don't Show: Do not show the Setup Type field but validate the Attendance value against room minimum and maximum capacities. • Show and Validate:

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Show the Setup Type field and validate the Attendance and Setup Type against all Setup Type and Capacity pairings for rooms. • Show But Don't Validate: Show the Setup Type field but do not validate Setup Type or Attendance.
Show Additional Filters Initially	Desktop Client > System Administration > Settings > Parameters >	Create/Manage Reservations	If set to “Yes,” then by default, room searching filters are made immediately available to the everyday user. In the web

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		application, filters are available under "Let Me Search for a Room."
Show Attendance on Room Request	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Controls whether the Number of People field appears as part of searching for a Room.
Show Feature Filter	Desktop Client > System Administration	Create/Manage Reser-	Controls whether Features appear as a search criteria for a room.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	> Settings > Parameters > Everyday User Applications tab	vations	
Show Floor Filter	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Controls whether Floors appear as a search criteria for a room.
Show	Desktop Client	Create/M-	Controls whether Room

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Room Type Filter	> System Administration > Settings > Parameters > Everyday User Applications tab	anage Reservations	Types appear as a search criteria for a room.
Validation of Building Hours	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	Controls whether Building Hours are enforced based on the Booking's Event Time or Reserved Time (i.e., the setup and/or tear-down time surrounding the booking).

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Warn User if Room Selected is Not Available for All Dates	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If enabled, a user will be alerted if a selected room is not available for all requested dates.
Reservation Source for New Reservation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Create/Manage Reservations	Specify the only reservation source that a user can select for a reservation.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		
Show Room Pricing	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/Manage Reservations	If enabled, room pricing will be displayed per the selection in the Default Pricing Plan parameter.
Require Cancellation Reason	Desktop Client > System Administration > Settings > Parameters >	My Events	If enabled, users must provide a cancellation reason if they opt to cancel a booking. Cancel Reasons are configured

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Everyday User Applications tab		within the desktop client under Configuration > Other > Cancel Reasons, and a Cancel Reason must be enabled for the everyday user in order to appear as an option.
Allow Add Booking to Reser-vation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	My Events	If enabled, users can add bookings to existing Reservations.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Allow Edit UDFs on Reser-vation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	My Events	If enabled, users can edit User Defined Field values for their existing Reservations.
Allow Reser-vation Edits	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	My Events	If enabled, a Everyday User to edit reservation-level information on exist-ing reservations--spe-cifically, Event Name, Event Type, Group and Contact information,

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		billing information, and a Comment (if one exists).
ICS File (Calendar Appoint-ment) Status	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	General	If the user selects Add to Personal Calendar from their existing reservations, this parameter controls if the default calendar appointment status is Busy or Tentative.
Show Ser-vice Avail-ability	Desktop Client > System Administration > Settings >	My Events	Controls whether the View Service Availability option appears when managing an existing reservation.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	Parameters > Everyday User Applications tab		Service Availability includes cutoff times for services enabled for the everyday user as well as Building to which services are available.
Adjust Service Order Times upon Booking Edit	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Services	If set to “Yes,” then Service Order Times are automatically adjusted if the booking time is modified.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Allow Edit of Services	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Services	If this option is set to “Yes,” users can edit the services they have added to events.
Maintain Inventory	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Services	If this option is set to “Yes,” the system notifies the user if an attempt to reserve a resource would cause the resource to be overbooked. The user must then select a new

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		quantity.
Populate Service Setup with Attend-ance	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Services	If enabled, the Estimated Count field for Catering-type Categories will be populated with the Attend-ance value.
Set Ser-vice Time Default from the Event	Desktop Client > System Administration > Settings > Parameters >	Services	If set to “Yes,” then the ser-vice start/end times are set by default to the event start/end times.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Time	Everyday User Applications tab		Note: This parameter is not enforced for EMS for Outlook. The service times will default to the event time when it is changed in EMS for Outlook.
Restrict Service Order Times Within Event Times	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Services	If enabled, users cannot specify Service Order Start or End times outside of the event's Start and End times.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Show Resource Pricing	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Services	If enabled, resource pricing will be displayed per the selection in the Default Pricing Plan parameter.
Allow Access To System Check Pages From Any	Desktop Client > System Administration > Settings > Parameters > All Applications tab	System	If disabled, access to SystemCheck.aspx for all applications except the EMS Web Application is limited to the web server. As of the June 2014 release, the EMS Web

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Machine?			Application will no longer have a SystemCheck.aspx page.
EMS Web Application URL	Desktop Client > System Administration > Settings > Parameters > All Applications tab	System	The Web App URL that is displayed in emails related to the web app as well as EMS Group Notifications that include cancellation and reconfirmation links.
EMS Web Application Hyperlink	Desktop Client > System Administration > Settings >	System	Controls the text for the Web App URL hyperlink in automatic confirmation emails (Configuration >

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Text	Parameters > All Applications tab		Everyday User Applications > Everyday User Process Templates > Confirmation > Summary tab.).
Allow Unauthenticated Users to Create Requests	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Unauthenticated Requests	If enabled, unauthenticated users (i.e., guests) will have the option to request a room. The (unauthenticated user) Web Process Template must also be configured in the desktop client under Configuration > Web > Web Process

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			Templates.
Show Group Column on My Events	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	My Events	If enabled, the Group column appears when a user is viewing a list of their Reservations.
Manual Account Creation - Sign Up Con-	Desktop Client > System Administration > Settings > Parameters >	Account Man-agement	Email text sent to a poten-tial web app user as a security measure to con-firm their request for an account. Applicable to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
firmation Email	Everyday User Applications tab		organizations whose allow automatic account creation instead of account requesting.
Manual Account Creation - Sign Up Success Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Man-agement	Email text sent to a new web app user to confirm their account has been created and is active. Email is sent as a result of the user selecting the link within the sign up con-firmation email. Applic-able to organizations whose allow automatic account creation instead

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
			of account requesting.
Manual Account Creation - Request Received Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	Email text sent to a potential web app user to confirm their request for an account has been received. Applicable to organizations whose allow account requesting instead of automatic account creation.
Manual Account Creation - Password	Desktop Client > System Administration > Settings >	Account Management	Email text sent as a security measure to a Everyday User who has requested reset of their account

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Reset Email	Parameters > Everyday User Applications tab		password. Not recommended for organizations who utilize integrated authentication.
Manual Account Creation - Password Reset Success Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	Email text sent to a Everyday User to confirm reset of their password. Not recommended for organizations who utilize integrated authentication.
Default Home	Desktop Client > System	Home Page	Controls which home page tab appears to

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Page	Administration > Settings > Parameters > Everyday User Applications tab		Everyday Users--Site Home (help text record for Default.aspx) or My Home). This parameter only applies to authenticated users.
Default Home Page for Unauthenticated Users	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Guest Home Page	Controls whether Site Home or My Home is the default tab when loading default.aspx. The default value of this parameter is Site Home. This parameter only applies to unauthenticated users.

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
Show Infographics on My Home	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Home Page	Controls whether the infographics about the Everyday Users' bookings appear on the My Home tab.
Default Cancel Reason	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications	Create/Manage Reservations	Controls which Cancel Reason, if any, is applied to bookings that are canceled by everyday users. The ability for a user to choose a Cancel Reason does not need to be

TITLE	CONFIGURED WHERE?	AREA	DESCRIPTION
	tab		enabled for a default Cancel Reason to be applied.

EMS for Outlook System Parameters

Items highlighted in blue below were added for EMS for Outlook Update 8.

The list below summarizes all parameters that affect EMS for Outlook, but they may also affect other Everyday User Applications.

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_ResBook_ ShowWhatInBar	Event Information to Display in Booking on Sched-	Desktop Client > System Administration > Settings > Parameters	Determines what information should show in the free/busy bar in the	. Schedule View

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
	ule View	> Everyday User Applications tab	Book. Options include: None, Event Name or Group Name	
VEMS_EmailAccount	Account to Use for Sending Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applic-	The email account against which outgoing email from EMS Web Appis	Email - Settings

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
		ations tab	authenticated. Only required if the SMTP mail server requires authentication.	
VEMS_EmailAccountPassword	Password of Email Account	Desktop Client > System Administration > Settings > Parameters > Everyday	The password for the email account. Only required if the SMTP	Email - Settings

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
		User Applications tab	mail server requires authentication.	
VEMS_EmailSender	Name of Email Sender	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Indicates the "From" name in the reservation summary email generated when an everyday user creates a reser-	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			vation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured (under Configuration > Everyday User Applic-	

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_EmailSenderAddress	Email Address of Sender	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	This entry indicates the “From” email address in the reservation summary email that is generated when a web user submits a reservation. Parameter Send	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			Request Summary upon Submit must be enabled, and a reservation summary email must be configured. (Provide link or reference to where email is configured.)	

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_EmailServer	Name or IP Address of SMTP Server	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	SMTP mail server used solely for emails related to everyday user application functionality. This mail server does not apply to emails generated within the desktop	Email - Settings

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			client or by any email notification service.	
VEMS_LocationFormat	Location Format	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Determines how location information is displayed in Browse Events and Create Reservation (List View). Options are Room Code,	General

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			Room Description, Building Code - Room Code, Building Code - Room Description, Building Description - Room Code, Building Description - Room	

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_Outlook_FilterFirst	Display Filters before showing Rooms	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Whether to show filter options before listing room availability.	Outlook
VEMS_ReservationBook_StartTime	Start Time on Schedule View	Desktop Client > System Administration > Settings >	Determines the start time for the grid view.	Schedule View

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
		Parameters > Everyday User Applications tab		
Vems_Reservations_AutoEmailFormat	Format for Request Summary	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Specify a detailed or summarized report for the reservation summary email that is generated when a web user submits a reser-	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			vation. Parameter Send Request Summary upon Submit must be enabled, and a reservation summary email must be configured. (Provide link or reference to where email is con-	

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_Reservations_AutoSendSummary	Send Request Summary upon Submit	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Determines whether reservation summary information is emailed to the web users when a reservation is submitted. A reservation summary email must be con-	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			figured. (Provide link or reference to where email is configured.)	
VEMS_Reservations_AutoSendSummaryOnCancel	Send Confirmation on Cancel	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Sends the reservation summary if the reservation or a booking is canceled.	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
VEMS_Reservations_DefaultSubject	Default Subject for Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	This entry appears in the Subject line of email the reservation summary email that is generated when a web user submits a reservation. Parameter Send Request	Email

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			Summary upon Submit must be enabled, and a reservation summary email must be configured. (Provide link or reference to where email is configured.)	
VEMS_Reservations_	Show	Desktop Cli-	Controls	Create/Man-

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
ShowFeatureList	Feature Filter	ent > System Administration > Settings > Parameters > Everyday User Applications tab	whether Features appear as a search criteria for a room.	age Reservations
VEMS_Reservations_ ShowFloorList	Show Floor Filter	Desktop Client > System Administration > Settings > Parameters > Everyday	Controls whether Floors appear as a search criteria for a room.	Create/Manage Reservations

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
		User Applications tab		
VEMS_Reservations_ShowRoomType	Show Room Type Filter	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Controls whether Room Types appear as a search criteria for a room.	Create/Manage Reservations
PAM_TextAboveEditLink	The text to display above the edit link	PAM Web Service > PAMConfig.aspx >	Message added to the appointment	PAM

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
		Message tab	body, above a link that takes the meeting organizer to the EMS Web App Reservation Summary page for that reservation. This message is seen by all users, but only the	

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			Reservation Summary page to make changes.	
PAM_WebServiceURL	Exchange Integration Web Service URL	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	The URL to the optional Integration to Exchange module. If Exchange Integration is enabled, this URL is inserted into the	Integration to Microsoft Exchange

KEYVALUE (TBLREGISTRY NAME)	TITLE	CONFIGURED WHERE?	DESCRIPTION	Area
			links within meeting appointments generated by the EMS Web App or EMS for Outlook.	

EMS Kiosk Parameters

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Floor Plans	Floor Plan Web Service URL	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The full URL for the web service used by the optional Floor Plan Configuration module. See “Configuring Floor Plans”.
Floor Plans	Show Availability Indicators on Locate Space	Desktop Client > System Administration > Settings > Parameters	When set to "Yes," availability indicators will show on floor plan images in EMS Kiosk App.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		> Kiosk tab	
Floor Plans	Show Floor Plan Module in Kiosk	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If enabled, the optional Floor Plan module can be displayed in EMS Kiosk.
Groups & Contacts	Everyday Users linked to Groups via External Reference	Desktop Client > System Administration > Settings > Parameters	Links group and web user records if group records are defined as individual employees (i.e., not depart-

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		> All Applications - tab	ments) in your system. When making a new reservation in EMS, the web user field is automatically populated based on the group selected.
Hoteling	Group Type Filtering Space Label on Make Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The label used if group type filtering is enabled.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Hoteling	Allow Check In From Kiosk	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” allows a user to check in to a workspace from EMS Workplace.
Hoteling	Enable Group Type Filtering on Make Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” enables feature filtering and/or room type filtering by group type on the Make a Reservation page.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Make Reservation	Booking Duration Set By Specific End Time Or Number Of Hours	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	Whether to set meeting end time by number of hours or specific end time. Defaults to "Specific End Time." "Number of Hours" uses the value from the "Default End Time for New Reservation" parameter (the start time + the Number of Hours value, rounded to the nearest

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			0, 15, 30, 45).
Labels	Building Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications - tab	The plural label for the Building field.
Labels	Building Title Singular	Desktop Client > System Administration >	The singular label for the Building field.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > All Applications - tab	
Labels	Group Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications - tab	The plural label of the Group field. The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc.).

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Labels	Group Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications - tab	The singular label of the Group field. The Group field refers to people within your organization who hold events in your facility (e.g., Employees, Departments, Clients, Customers, etc.).
Make Reservation	Number Of Hours For Booking	Desktop Client > System Administration >	The default number of hours to use when setting the Booking Duration",

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	values from 0.5 to 12. See also: "Booking Duration Set By Specific End Time Or Number Of Hours."
Labels	Room Title Plural	Desktop Client > System Administration > Settings > Parameters > All Applications - tab	The plural label of the Room field. The Room field refers to reservable spaces within your organization.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Labels	Room Title Singular	Desktop Client > System Administration > Settings > Parameters > All Applications - tab	The singular label of the Room field. The Room field refers to reservable spaces within your organization.
Make Reservation	Conflict Status for New Reservation	Desktop Client > System Administration > Settings > Parameters	The status that is applied to bookings that are in conflict with an existing booking.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		> Kiosk tab	
Make Reservation	Default End Time for New Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The daily end time for new reservations. This setting is only used if the parameter Allow Start/End Time Editing is set to “No,” or if multi-day bookings are allowed.
Make Reservation	Default Start Time for New Reservation	Desktop Client > System Admin-	The default start time for new reservations that are cre-

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		istration > Settings > Parameters > Kiosk tab	ated through EMS Kiosk. This setting is only used if the parameter Allow Start/End Time Editing is set to “No,” or if multi-day bookings are allowed.
Make Reservation	Default Event Name for New Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The default name for new reservations that are created through EMS Kiosk The %USER% text is a variable that is

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			replaced with the group name. You can remove this variable.
Make Reservation	Event Type for New Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The event type that is applied to reservations created through EMS Kiosk.
Make Reservation	Default Search = Floor Map on Make Reser-	Desktop Client > System Admin-	If set to “Yes,” then when an EMS Kiosk user

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
	vation	istration > Settings > Parameters > Kiosk tab	searches for available rooms, the floor plan view is used for the default results.
Make Reservation	Reservation Source for New Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The reservation source that is applied to reservations created through EMS Kiosk.
Make Reser-	Number of Future Con-	Desktop Client > Sys-	The number of days in the future

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
vation	current Days Allowed for New Reservation	tem Admin-istration > Settings > Parameters > Kiosk tab	that bookings can be made.
Make Reser-vation	Start Date Allowed for New Reservation (days)	Desktop Client > Sys-tem Admin-istration > Settings > Parameters > Kiosk tab	The number of days after the cur-rent day's date that a reservation can be made through EMS Kiosk.
Make Reser-	Display Start/End Time	Desktop Client > Sys-	If set to "Yes," the Start Time and End

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
vation	Drop Downs	tem Administration > Settings > Parameters > Kiosk tab	Time dropdown lists are displayed on the Make Reservation page. If set to “No,” the default start and end times are used for bookings.
Make Reservation	Status for New Reservation	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The status that is applied to reservations created through the EMS Kiosk.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Make Reservation	Time Drop Down Increment	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The time increment that is used on Time dropdown menus.
Make Reservation	Enable Everyday User Process Template Security	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” the user's web process templates in addition to the rooms that are configured in the kiosk profile are used to determine which rooms

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			are displayed on the Make Reservation page.
Miscellaneous	Display Cancel Button for Group Searches	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” the Cancel button is displayed for group searches, allowing the user to cancel a search.
Miscellaneous	Default Page	Desktop Client > System Administration >	The first page that first opens in EMS Kiosk or that is displayed when EMS

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	Kiosk times-out.
Miscellaneous	Location Format	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	Select from Building Code, Room or Room Description or Building Description, Room or Room Description.
Miscellaneous	Max Booking/Availability Records Returned	Desktop Client > System Administration >	The maximum number of rooms that are displayed when making a reser-

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	vation.
Miscellaneous	Max Records Returned for Group Searches	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The maximum number of records returned when searching for a group.
Miscellaneous	Disable Standby Mode on Timeout	Desktop Client > System Administration >	If set to “No,” then EMS Kiosk goes into Standby-by Mode (a Stand By

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	button is displayed) after timing out.
Miscellaneous	Page Timeout (seconds)	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The period of inactivity in EMS Kiosk, after which the default page is displayed.
Miscellaneous	Browser Title	Desktop Client > System Administration >	The text that is displayed in the title bar of the Kiosk browser.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	
My Reservations	Allow User to Cancel Booking	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” then users can cancel bookings from the Reservations page.
My Reservations	Future Booking Cancellation Cutoff (days)	Desktop Client > System Administration >	The number of days prior to a future booking that the booking can be

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	canceled.
My Reservations	Cancel Status	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The status that is applied to canceled bookings.
My Reservations	Same Day Booking Cancellation Cutoff (minutes)	Desktop Client > System Administration >	Used in conjunction with the Allow User to Cancel Bookings parameter. A user

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	can cancel an in-progress booking up to the number of indicated minutes before the booking occurs.
My Reservations	Allow User to Cancel/End Booking outside of Kiosk Profile	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If enabled, users can cancel or end a booking outside of using their EMS Kiosk profiles.
My Reser-	Allow User to	Desktop	If set to “Yes,” then

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
vations	End Booking	Client > System Administration > Settings > Parameters > Kiosk tab	users can end their bookings from the My Reservations page.
Security	Show 10 Key As Modal	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	Used with the Use 10-Key Keyboard for Authentication parameter. Displays 10-key keyboard as a modal popup on the page.
Security	Group Field	Desktop	The field that is

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
	used for "Exact Match" Authentication	Client > System Administration > Settings > Parameters > Kiosk tab	compared with the ID that the user enters: External Reference, Badge Number, Personnel Number (all of these are group settings). This parameter is used in conjunction with the Primary User Authentication Type parameter, which must be set to Exact Match.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Security	Primary User Authentication Type	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The options are as follows: • Standard - Partial names are enough for a match, and all groups that match are listed. • Exact Match - The ID entered must exactly match what is set in the parameter Group Field Used for “Exact Match” Authentication. • LDAP - Both the

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			user's network ID and password must be entered.
Security	Primary User Authentication Type	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The options are as follows: • Standard - Partial names are enough for a match, and all groups that match are listed. • Exact Match - The ID entered must exactly match what is set in the parameter Group Field

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			Used for “Exact Match” Authentic-ation. • LDAP - Both the user's network ID and password must be entered.
Security	Primary User Authentication Type	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	The options are as follows: • Standard - Partial names are enough for a match, and all groups that match are listed. • Exact Match - The

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
			ID entered must exactly match what is set in the parameter Group Field Used for “Exact Match” Authentication. • LDAP - Both the user's network ID and password must be entered.
Security	Primary User Authentication Type	Desktop Client > System Administration >	The options are as follows: • Standard - Partial

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	names are enough for a match, and all groups that match are listed. • Exact Match - The ID entered must exactly match what is set in the parameter Group Field Used for “Exact Match” Authentication. • LDAP - Both the user's network ID and password must be entered.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Security	Require Timeout/Logoff to Terminate User Session	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” then a user must “hit” the Log Off button to end their EMS Kiosk session.
Security	Secondary User Authentication Type for Badge Authentication	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	(Used only if “Badge” is primary security). Alternate authentication method that is used when a user doesn't have his/her badge.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Security	Use 10-Key Keyboard for Authentication	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	Uses a numeric 10-key numeric keyboard instead of the full keyboard.
Security	Require Authentication for all Kiosk Functions	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	Requires users to identify themselves before using EMS Kiosk. Used for kiosks in a public location where an exact user ID match is needed.

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
Today's Events	Default Sort Column	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” sets Today's Events to sort (in Ascending/Descending order) by Start Time, End Time, Event Name, Employee Name, Location, and Has Map. Defaults to "No."
Today's Events	Display Building Drop Down	Desktop Client > System Administration >	If set to “Yes,” users can filter by building on the Today's Events

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	page.
Today's Events	Drop Events in Past	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” then events that occurred before the current day’s time are not displayed on the Today's Events page.
Today's Events	Display Event Name Search	Desktop Client > System Administration >	If set to “Yes,” then the Search for Events button is displayed on the

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	Today’s Events page.
Today's Events	Display Floor Drop Down	Desktop Client > System Administration > Settings > Parameters > Kiosk tab	If set to “Yes,” users can filter by floor on the Today's Events page.
Today's Events	Display Room Type Drop Down	Desktop Client > System Administration >	If set to “Yes,” users can filter by room type on the Today's Events

AREA	CONFIGURED WHERE?	DESCRIPTION	AREA
		Settings > Parameters > Kiosk tab	page.

EMS Mobile App Parameters

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
VEMS_DefaultCancelReason	Default Cancel Reason	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Create/-Manage Reservations	Controls which Cancel Reason, if any, is applied to bookings that are canceled

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
				by everyday users. The ability for a user to choose a Cancel Reason does not need to

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
MOBILE_HelpLinkLabel	Label for the Help Link on the mobile app	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	
MOBILE_HelpLinkURL	URL for the Help Link on	Desktop Client > System Administration > Set-	Mobile-Specific	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	the mobile app	tings > Parameters > Everyday User Applications tab		
Mobile_Require2FA	Requires 2-factor authentication for all mobile logins	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	Requires Two-Factor Authentication for mobile authentication

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
Mobile_AuthHeaderVariable	Sets the header variable for the EMS Mobile API's Header Authentication Method	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	
MOBILE_2faEmailSubject	The subject	Desktop Client > System	Mobile-Specific	Subject of the

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	for the EMS Mobile two-factor setup email	Administration > Settings > Parameters > Everyday User Applications tab		email sent to users notifying them to go to the EMS - Web App and scan their 2fa barcode

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
MOBILE_EverydayAppConfigJson	Authentication configuration for the EMS Mobile App	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	Stores the configuration the mobile app will use to authenticate against the api
MOBILE_MaxSupportedAppVersion	Maximum EMS	Desktop Client > System Admin-	Mobile-Specific	Maximum app ver-

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	Mobile App version that the API should allow to connect	istration > Settings > Parameters > Everyday User Applications tab		sion that the api will allow to connect
MOBILE_MinSupportedAppVersion	Minimum EMS Mobile App version	Desktop Client > System Administration > Settings > Parameters >	Mobile-Specific	Minimum app version that the api will

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	that the API should allow to connect	Everyday User Applications tab		allow to connect
MOBILE_NumberofDays	Inactivity period in minutes before auto logout	Desktop Client > System Administration - Settings - Parameters - Everyday User Applications tab	Mobile-Specific	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	from mobile app			
MOBILE_QueryStringKey	Key used to sign mobile query strings in links to virtual	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	Key used to encrypt the query strings when emailing users links to the

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
				EMS - Web App
MOBILE_SessionTokenSigningKey	Key use to for signing EMS Mobile session tokens	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	Key used to sign the tokens authenticated users receive once they create

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
				a valid session
VEMS_User_RequirePhone	Require Phone during account creation	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Account Management	
VEMS_User_SecurityStatus	Default Accou-	Desktop Client > System	Account Man-	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	nt Status for Newly-Created User	Administration > Settings > Parameters > Everyday User Applications tab	agement	
VEMS_ResBook_ShowWhatInBar	Event Information to Display in Booking on Schedule	Desktop Client > System Administration > Settings > Parameters > Everyday User Applic-	Schedule View	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	View	ations tab		
VEMS_ReservationBook_StartTime	Start Time on Schedule View	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Schedule View	
VEMS_Browse_DropEventsInPast	Drop Events from Daily	Desktop Client > System Administration > Set-	Browse Events	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	View After They Occur	tings > Parameters > Everyday User Applications tab		
VEMS_EmailAccount	Account to Use for Sending Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
VEMS_EmailAccountPassword	Password of Email Account	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email - Settings	
VEMS_EmailSender	Name of Email Sender	Desktop Client > System Administration > Settings > Parameters >	Email	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
		Everyday User Applications tab		
VEMS_EmailSenderAddress	Email Address of Sender	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email	
VEMS_EmailServer	Name or IP	Desktop Client > System	Email - Settings	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	Address of SMTP Server	Administration > Settings > Parameters > Everyday User Applications tab		
Vems_Reservations_AutoEmailFormat	Format for Request Summary	Desktop Client > System Administration > Settings > Parameters > Everyday User Applic-	Email	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
		ations tab		
VEMS_Reservations_ AutoSendSummary	Send Request Summary upon Submit	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email	
VEMS_Reservations_ AutoSendSummaryOr	Send Confirmation	Desktop Client > System Administration > Set-	Email	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	on Cancel	tings > Parameters > Everyday User Applications tab		
VEMS_Reservations_DefaultSubject	Default Subject for Email	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Email	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
LDAP_Authenticate	This determines whether to authenticate with Ldap.	Virtual EMS > LDAPConfiguration.aspx > Security tab	LDAP	
MOBILE_CheckinProximityDistance	Mobile checkin proximity distance	Desktop Client > System Administration > Settings > Parameters >	Mobile-Specific	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
		Everyday User Applications tab		
MOBILE_CheckinProximityUnitOfMeasureme	Mobile checkin proximity unit of measurement	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	
MOBILE_MinutesToRe-	Inactivity	Desktop Client > System	Mobile-Specific	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
memberLogin	period in minutes before auto logout from mobile app	Administration > Settings > Parameters > Everyday User Applications tab		
MOBILE_ProximityDistance	Mobile building proximity	Desktop Client > System Administration > Settings >	Mobile-Specific	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
	distance	Parameters > Everyday User Applications tab		
MOBILE_ProximityUnitOfMeasurement	Mobile building proximity unit of measurement	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Mobile-Specific	
PAM_Tex-	The	PAM Web	PAM	

KEYVALUE (TBLREGISTRY NAME)	DESCRIPTION	CONFIGURED WHERE?	AREA	NOTES
tAboveEditLink	text to display above the edit link	Service > PAMConfig.aspx > Message tab		
PAM_WebServiceURL	Exchange Integration Web Service URL	Desktop Client > System Administration > Settings > Parameters > Everyday User Applications tab	Integration to Microsoft Exchange	

Import File Specifications

You can streamline data entry by importing a variety of data items into your EMS database from tab-delimited text files, including holidays, rooms, resources, groups, reservations, and course schedule patterns. This appendix section details the import file specifications for each of these data items.

> Tip: If your organization has licensed the optional EMS module, EMS Human Resources Toolkit, refer to the HR Toolkit Installation Guide.

If you are importing data to your EMS database using a spreadsheet, due to the extraneous formatting hidden in Microsoft® Excel, the best practice is:

- Build your spreadsheet
- Copy and paste it into Notepad
- Import it from the Notepad file

HOW DO I IMPORT DATA?

For instructions in importing data, follow the links in the table below:

TYPE OF IMPORT	IMPORTING INSTRUCTIONS	FILE SPECIFICATIONS
Reservations		Reservation Import File Specifications
Special Dates (Holidays)	Configure Special Dates or Holidays	
Resources	Importing Resources for a Category	
Groups (People)	Import Groups	
Rooms	Import Rooms	
(EMS Campus) Final Exam Schedules	Importing Final Exam Schedule Templates	

Tip: Your organization may also have licensed the Academic Import Utility, which enables you to import lists of reservations for academic or Campus implementations.

Special Date Import File Specification

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Date	1	10	Date	mm/dd/yyyy	Required	11/23/2017
Description	2	30	Alphanumeric	Left Justified	Required	Thanksgiving Day
Notes	3	7000	Alphanumeric	Left Justified	Optional	Staff Holiday - No

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
						Events Allowed

Room Import File Specification

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Room Code	1	16	Alpha-numeric	Left Justified	Required	BCR
Room Description	2	50	Alpha-numeric	Left Justified	Required	Breckenridge Conference Room

Resource Import File Specification

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Grouping	1	50	Alphanumeric	Left Justified	Required	Beverages
Description	2	50	Alphanumeric	Left Justified. Must be a uniqu-	Required	Coffee

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
				e value.		
Notes	3	7000	Alpha-numeric		Optional	Decaf provided upon request
Price	4	2 decimal places	Decimal	(##.##)	Required	10.00

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Available On Web	5	5	Alphanumeric	True or False	Required	True
Express Checkout	6	5	Alphanumeric	True or False	Required	False
Serves	7	2 decimal places	Decimal	(##.##)	Required	10.00

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Min. Quantity	8	2 decimal places	Decimal	(##.##)	Required	05.00

Group Import File Specifications

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Group Name	1	50	Alpha-numeric	Left Justified	Required	Accounting Department
Address 1	2	50	Alpha-numeric	Left Justified	Optional	834 Colorado Blvd.
Addre-	3	50	Alpha-	Left	Optio-	Box 286

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
ss 2			numeric	Justified	nal	
City	4	50	Alphanumeric	Left Justified	Optional	Denver
State	5	2	Alphanumeric	Left Justified	Optional	CO
Zip Code	6	10	Alphanumeric	Left Jus-	Optional	80111

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
				tified		
Country	7	50	Alpha-numeric	Left Justified	Optional	USA
Email Address	8	75	Alpha-numeric	Left Justified	Optional	sales@organization.com
Phone 1	9	30	Alpha-numeric	Left Justified	Optional	303-740-4428

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Phone 2	10	30	Alpha-numeric	Left Justified	Optional	303-740-4429
Billing Reference	11	50	Alpha-numeric	Left Justified	Optional	10-24670

Reservation Import File Specifications

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Date	1	10	Date	mm/dd/yyyy	Required	11/15/2017
Event Start Time	2	4	Numeric	hhmm	Required	0800
Event End Time	3	4	Numeric	hhmm	Required	1300

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
Building	4	50	Alpha-numeric	Left Justified	Required	Adams
Room	5	50	Alpha-numeric	Left Justified	Required	Arapahoe Conference Room
Event Name	6	255	Alpha-numeric	Left Justified	Required	Staff Meeting
Group Name	7	50	Alpha-numeric	Left Justified	Required	Accounting Depart-

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
						ment
Contact Name	8	50	Alpha-numeric	Left Justified	Optional	Mindy Brady
Setup Count	9	5	Numeric	##	Required	8
Reservation Reference	10	20	Alpha-numeric	Unique identifier that is used to group	Optional	R1

FIELD	FIELD SEQUENCE	MAX WIDTH	DATA TYPE	FORMAT	OPTIONAL OR REQUIRED	EXAMPLE
				bookings into one reservation		

Course Schedule Import File Specifications

COLUMN	TYPE	REQUIRED UNIQUE	MAX CHARS.
Sunday	True/False	Yes	
Monday	True/False	Yes	
Tuesday	True/False	Yes	
Wednesday	True/False	Yes	
Thursday	True/False	Yes Sequence	
Friday	True/False	Yes	

COLUMN	TYPE	REQUIRED UNIQUE	MAX CHARS.
Saturday	True/False	Yes	
Start Time	Text (HHMM)	Yes	4
End Time	Text (HHMM)	Yes	4
Final Exam Day Of Week	Text (UMTWRFS)	Yes	
Final Exam Start Time	Text (HHMM)	Yes	4
Final Exam End Time	Text (HHMM)	Yes	4

Video Conferencing

This section details the configuration of the necessary features, resources, rooms, and everyday user process templates to accommodate reservations or room requests that require video conferencing capability.

For organizations that use video conferencing, additional configuration features are available to simplify the video conference reservation process, which typically uses a request /approval room request process. When configured properly, EMS searches for all rooms that have a built-in video conferencing feature and it searches for all rooms defined in the system to accommodate a video conference. Shown below is a reservation with a mobile video conferencing cart automatically added to bookings.

Reservation with video conferencing features automatically added to bookings

You must configure the following types of rooms so the correct rooms and equipment display when users request video conferences in the Reservation Wizard (or the EMS Web App).

» **Standard meeting rooms that can accommodate a mobile video conferencing cart.** Room availability for this scenario is based on the availability of the room and on the availability of the mobile video conferencing cart resource pool. For a room to be displayed as available, at least one mobile video conferencing cart must be available for the time slot selected. If a user selects one of these rooms, a booking detail for a mobile video conferencing cart is automatically added to the booking after the reservation is submitted.

- **A room or other location that can accommodate a mobile video conferencing cart.** The room is configured as an Override Description room type. Room availability for this scenario is based only on the availability of the mobile video conferencing cart resource pool. If a user selects this room, the user can enter a location. After the reservation is submitted, a booking detail for a mobile video conferencing cart is automatically added to the booking.

Configure Video Conference Capabilities

To configure video conferencing capabilities (so that Everyday Users can book video conference meetings in EMS Web App or EMS for Outlook) you will:

- Configuring Video Conference Room Features
- Configure Video Conference Services (Categories and Resources)
- Configure Rooms With Video Conference Equipment.
- Configure Override Rooms
- Configure Event Types
- Configure a Video Conference Booking Template
- Configure Notifications and Reports

CONFIGURING VIDEO CONFERENCE ROOM FEATURES

A feature is a built-in or permanent attribute of a room, such as a network connection, a built-in plasma TV, window, and so on. Your users can use features as criteria when they are searching for a room. They can also filter the available rooms that can be reserved for an event by room features. After you configure different room features for your organization, you must indicate which rooms have these features.

1. Configure Room Features in EMS Desktop Client to reflect your video conferencing equipment options, such as a projector or a webcam. For detailed instructions, See Also: Configuring Features.

> Tip: Be sure to select Tied to Resource when configuring a video conference Feature. This links the room to video conferencing equipment and services and streamlines the booking process. If you want EMS

Veb App users to see this feature when they are searching for avail-
ble space, leave Available to Everyday Users selected.

2. Associate the feature(s) with Rooms (on the Features tab for Room Configuration); move the feature from the Available panel to the Selected panel as shown below. For detailed instructions, See Also: Configuring Rooms.

Tip: Do not select the Maintain Inventory option when you are configuring this resource.

CONFIGURE VIDEO CONFERENCE SERVICES (CATEGORIES AND RESOURCES)

Configure several service categories to represent additional services to be performed for the video conference, such as A/V Setup, and a Mobile Video Conference Cart.

1. Configure a category for video conferencing services. Configure Categories.
2. Configure resources and services within the Category for equipment, setup, tear down, etc. For detailed instructions, See Also: Configuring Resources for a Category. Depending on your organization, you may need to configure two types of video conferencing resources for the category that you just created:

» Built-in video conferencing equipment, such as a Built-in Video Conference Equipment (Note: Do not select the Maintain Inventory option).

» A Mobile Video Conferencing Cart (Note: Be sure to select the Maintain Inventory option , plus a value in the Quantity Available field).

> Tip: You can use the Room Configuration Wizard to mass-assign a feature to multiple rooms in a single step. Additionally, you may need to set the Status for these services to Request if your organization requires approvals.

For detailed instructions, See Also: Room Administration Wizard.

CONFIGURE A VIDEO CONFERENCE BOOKING TEMPLATE

For detailed instructions, see Configuring an Everyday User Booking Template and use the example below.

> Tip: Video conferences are typically reserved in EMS Web App due to its streamlined permissions management and ease of use (especially the Calendar view). If you have a significant number of users who book video conferences in EMS Desktop Client, especially if they have

limited access and may not be comfortable using the more expert users' booking process, you may wish to create a video conference template for the Reservation Wizard. Familiarize yourself with the process here and then for detailed instructions, See Also: Creating Reservation Wizard templates.

1. Set the Mode to Self Serve. and the Video Conference option is selected for the template. If your organization requires such meetings to be approved, use Requested Request Status.

2. Move Categories (Resources and Services) for setup, teardown, equipment, and so forth, as you defined above, into the Selected panel on the Categories tab. Below is an example showing all "VC" (video conference) service categories for an organization enabled for users to select when booking with this template.

3. Move Rooms (which you defined above) on the Rooms tab to the Selected panel. If your organization requires video conference-equipped rooms to go through an approval process, use the Request panel on the lower right.

Concept: Override Rooms Can "Override" Normal Room Configuration and Setup/Teardown Times

Users will be able to change configuration and start and end time defaults that would normally come from the room definition, in order to accommodate extra video conferencing equipment and services.

---

4. Move Event Types (which you defined above) on the Event Types tab to the Selected panel.

5. On the Video Conference tab, select the video conferencing feature you defined in Step 1 (above).

6. Complete fields on the remaining tabs as needed and click OK to save.

CONFIGURE NOTIFICATIONS AND REPORTS

To set how and when users are notified about the meeting and any changes to it (particularly as equipment and service requests move through the approval process), Configure Notification Rules.

> Tips: Notification Rules are highly recommended if you integrate with CISCO TMS.

The most common report run on video conferences is the Setup Worksheet report, set to automatically run daily or weekly, and to deliver to stakeholders' inboxes. For detailed instructions, See Also: EMS Setup Worksheet.

Overview of Video Conferencing Configuration

For organizations that use video conferencing, additional configuration features are available to simplify the video conference reservation process, which typically uses a request or approval for room request process. When configured properly, EMS searches for all rooms that have a built-in video conferencing feature and it searches for all rooms defined in the system to accommodate a video conference. Shown below is a reservation with a mobile video conferencing cart automatically added to bookings.

You must Configure Room Types the following types of rooms so the correct rooms and equipment display when users request video conferences in the Reservation Wizard (or the EMS Web App).

» **Standard meeting rooms that can accommodate a mobile video conferencing cart**. Room availability for this scenario is based on the availability of the room *and* on the availability of the mobile video conferencing cart resource pool. For a room to be displayed as available, at least one mobile video conferencing cart must be available for the time slot selected. If a user selects one of these rooms, a booking detail for a mobile video conferencing cart is automatically added to the booking after the reservation is submitted.

» **A room or other location that can accommodate a mobile video conferencing cart**. The room is configured as an *Override Description* room type. Room availability for this scenario is based only on the availability of the mobile video conferencing cart resource pool. If a user selects this room, the user can enter a location. After the reservation is submitted, a booking detail for a mobile video conferencing cart is automatically added to the booking.

Academic Import Utility

The Academic Import Utility (AIU) is an optional, add-on component for EMS that is designed to manually import from your Student Information System, or SIS. For each scheduled class that is being imported, a single reservation with multiple bookings is created. One booking is created for each date on which the class meets. All class reservations created by the import process are assigned to one Group (customer, client, and so on) that you have configured in your EMS database. The imported class data can be one of two formats, tab-delimited or fixed width. In addition, prior to using the AIU, you should have certain items configured in your EMS database.

To import data, you must configure a session for each block of data (i.e. quarter or semester). After you have configured a session, AIU saves the settings for use in both the initial import and any subsequent re-import. When a session is re-imported, only events in the import file that have changed since the last import are recreated in the EMS database. This prevents the unnecessary re-import of unchanged events and the

associated invalidation of large ranges of reservation numbers. After configuring a session, you import the session.

> Warning: Creating reservations can take an extended time and must be performed when no users are logged on to EMS. (To log off active users, see “Viewing and Emailing Logged-In Users”.) The time required to create reservations varies depending on the amount of data involved and the processing power of the computer making the reservations. After the import process completes, the system automatically displays a report listing booking conflicts, if any.

Reservations that were added to the EMS database using the AIU can be removed from the database using the AIU as well. Deleting a session removes all reservations created using the session.

> Tip: Before you configure an AIU session, you should review the Academic Import Days of the Week setting in your system parameters. This

setting dictates whether the AIU interprets days of the week based on their position within the data (with options for Sunday first or Monday first) or based on specific text entries (Su = Sunday, M = Monday, and so on). See “System Parameters”.

Tip: All fields are required unless noted otherwise.

FIELD	FIELD SEQUENCE	MAX WIDTH	TYPE	FORMAT	EXAMPLE
Department	1	10	Alpha numeric	Left Justified	ACCT
Course	2	10	Alpha numeric	Left Justified	101

FIELD	FIELD SEQUENCE	MAX WIDTH	TYPE	FORMAT	EXAMPLE
Section	3	10	Alpha numeric	Left Justified	1
CourseTitle	4	50	Alpha numeric	Left Justified	Intro to Accounting
Instructor	5	50	Alpha numeric	Left Justified	Bob Smith
Days	6	7	Alpha numeric	Left Justified	Parameter driven.

FIELD	FIELD SEQUENCE	MAX WIDTH	TYPE	FORMAT	EXAMPLE
					Positional or specific text. e.g. “M W F” for Positional, Monday First
Building	7	10	Alpha numeric	Left Justified	AC
Room	8	20	Alpha	Left Jus-	101

FIELD	FIELD SEQUENCE	MAX WIDTH	TYPE	FORMAT	EXAMPLE
			numeric	tified	
BegTime	9	4	Numeric	Zero Filled (Numerics only)	1400
EndTime	10	4	Numeric	Zero Filled (Numerics only)	1450
StartDate (Optional)	11	10	Date	Formatted (mm/dd/yyyy)	8/30/2017

FIELD	FIELD SEQUENCE	MAX WIDTH	TYPE	FORMAT	EXAMPLE
EndDate (Optional)	12	10	Date	Formatted (mm/dd/yyyy)	12/17/2017
Attendance (Optional)	13	5	Numeric	Zero Filled (Numerics only)	35

FIXED WIDTH FORMAT

> Tip: All fields are required unless noted otherwise.

FIELD	COLUMN	WIDTH	FIELD TYPE	FORMAT	EXAMPLE
Department	1	10	Alpha numeric	Left Justified, Trailing Spaces	ACCT
Course	11	10	Alpha numeric	Left Justified, Trailing Spaces	101
Section	21	10	Alpha numeric	Left Justified, Trailing Spaces	1
CourseTitle	31	225	Alpha numeric	Left Justified, Trailing Spaces	Intro to Accounting

FIELD	COLUMN	WIDTH	FIELD TYPE	FORMAT	EXAMPLE
Instructor	81	50	Alphanumeric	Left Justified, Trailing Spaces	Bob Smith
Days	131	7	Alphanumeric	Left Justified, Trailing Spaces	Parameter driven. Positional or specific text. e.g. “M W F” for Positional, Monday First

FIELD	COLUMN	WIDTH	FIELD TYPE	FORMAT	EXAMPLE
Building	138	10	Alpha numeric	Left Justified, Trailing Spaces	AC
Room	148	20	Alpha numeric	Left Justified, Trailing Spaces	101
BegTime	168	4	Numeric	Right Justified, Zero Filled (numerics only)	0800
EndTime	172	4	Numeric	Right Justified, Zero	1450

FIELD	COLUMN	WIDTH	FIELD TYPE	FORMAT	EXAMPLE
				Filled (numerics only)	
StartDate (Optional)	176	10	Date	Formatted (mm/dd/yyyy)	08/30/2017
EndDate (Optional)	186	10	Date	Formatted (mm/dd/yyyy)	12/17/2017
Attendance (Optional)	196	5	Numeric	Right Justified, Zero Filled (numerics only)	00035

CONFIGURED ITEMS FOR THE AIU

Prior to using the AIU, you should have the following items configured in your EMS database:

ITEM	DESCRIPTION
Group	When reservations are created through the import process, one Group (client, customer, and so on) is the reservation holder for all reservations. You might want to define a group that is used specifically for the reservations that are created through the import process, for example, Registrar's Office.
New Bookings Status	When running the AIU, you must specify a status for the new bookings that are created. This status must of the “Book Space” status type. While you can use an existing status such as Confirmed, it is generally best to create a new status (for example, Academic - Confirmed) to denote

ITEM	DESCRIPTION
	the imported data.
Conflict Status	You must create a conflict status to give to the new bookings if the room they require is already booked. This status should have a status type of either “Info Only” or “Wait,” as those types of bookings can be created even if there is already a confirmed booking in the room. Academic - Conflict is a commonly used name for this status.
Cross List Status	You must create a status to apply to bookings when the system encounters conflicts within an import file (i.e., the same class with different names). This status should have a status type of either “Info Only” or “Wait.”
Override Status	You can configure the settings in an AIU session to allow AIU bookings to override existing bookings, if appropriate. The status is changed for the existing bookings and the

ITEM	DESCRIPTION
	room is reserved for the imported bookings. You must create an override status to apply to the bookings that have been bumped. This status should have a status type of either “Info Only” or “Wait.”

In addition, you might want to define a unique Event Type and Setup Type that is to be used solely for class reservations.

To import data, you must configure a session for each block of data (i.e., quarter or semester). After you have configured a session, AIU saves the settings for use in both the initial import and any subsequent re-import. When a session is re-imported, only events in the import file that have changed since the last import are recreated in the EMS database. This prevents the unnecessary re-import of unchanged events and the associated invalidation of large ranges of reservation numbers. After configuring a session, you import the data for the session.

Tip: Creating reservations can take an extended time and must be performed when no users are logged in to EMS. (To log off active users, see “Viewing and Emailing Logged-In Users”.) The time required to create reservations varies depending on the amount of data involved and the processing power of the computer making the reservations. After the import process completes, the system automatically displays a report listing booking conflicts, if any.

Reservations that were added to the EMS database using the AIU can be removed from the database using the AIU as well. Deleting a session removes all reservations created using the session.

Tip: Before you configure an AIU session, you should review the Academic Import Days of the Week setting in your system parameters. This setting dictates whether the AIU interprets days of the week based on their position within the data (with options for Sunday first or Monday first) or based on specific text entries (Su = Sunday, M = Monday, and so on). See “System Parameters”.

CONFIGURE AN AIU SESSION

> Tip: This section describes the steps for configuring a new session for the AIU. If you simply need to load an existing session, then after opening the Sessions window, skip to “To import the data into the session”.

1. On the EMS menu bar, click Reservations > Academic Import > Academic Import Utility. The Sessions window opens. This window lists all the sessions that are currently configured in your EMS database.

2. Click New. The Session dialog box opens.

3. Enter the information for the new AIU session.

FIELD	DESCRIPTION
Session Code	A unique identifier for the session, for example, SPRING17.
Description	An expanded definition of the session code, for example, Spring Semester 2017.

FIELD	DESCRIPTION
	Note: The description can be a maximum of 50 characters, including spaces.
Start Date End Date	The start date and end date for the session, for example, 1/15/17 and 5/31/17.
Group	The reservation holder for all reservations in the session. For example, Registrar's Office. You can select a value from the Group dropdown list, or you can click the Search icon to open the Groups window and create the necessary group. See “Configuring Groups”.
Event Type	Select a value from the dropdown list. If none of the event types that are currently configured in your EMS database meets your needs, then you can configure a type (for example, Academic). See “Configuring Event

FIELD	DESCRIPTION
	Types”.
Setup Type	Select a value from the dropdown list. If none of the event types that are currently configured in your EMS database meets your needs, then you can configure a type (for example, Classroom). See “Configuring Setup Types”.
Status	The status for the new bookings that are created. Note: While you can use an existing status such as Confirmed, it is generally best to create a new status (for example, Academic - Confirmed) to denote the imported data. See “Configuring Statuses”.
Conflict Status	Available after you specify a Status. Select a value from the dropdown list. If none of the statuses that are cur-

FIELD	DESCRIPTION
	rently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Conflict). See “Configuring Statuses”.
Use Cross List Status	Select this option if the system is to apply a special status to classes that are cross-listed in the import file. (The class appears twice in the file, with each occurrence having a different name.)
Cross List Conflict Status	Available if you select Use Cross List Status. The status that is to be applied to cross-listed classes. Select a value from the dropdown list. If none of the statuses that are currently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Cross List). See “Configuring Statuses”.

FIELD	DESCRIPTION
Override Existing Bookings	Select this option if the system is to give import file events precedence over existing events in the EMS database.
Override Conflict Status	Available if you select Override Existing Bookings. The status that is to be applied to existing events if they are overridden by imported events. Select a value from the dropdown list. If none of the statuses that are currently configured in your EMS database meets your needs, then you can configure a status (for example, Academic - Conflict). See “Configuring Statuses”.
Reservation Source	Select a source for the reservation. If none of the sources that are currently configured in your EMS database meets your needs, you can configure a source. See “Configuring Reservation Sources”.

4. Click OK. The Session dialog box closes. You return to the Sessions window with the newly configured session displayed in the window.
5. Continue to “To import the data into the session.”

IMPORT THE DATA INTO THE SESSION

1. Select the session that you are using for importing classes, and then click Load. The first of three AIU windows opens.

2. Click the Search icon to browse to and select the file that you are importing.
3. On the Import Format dropdown list, select the format for the file (Fixed

Width or Tab Delimited).

4. Click Next. Two results are possible:

» If any of the records in the import file have any issues (missing data, data that is not in the correct format, data that falls outside the start and/or end dates, and so on) a message opens that details the issue and if applicable, the number that cannot be imported, and asking if you want to continue. You can click No in the message, and then correct the errors in the file before you load the file again, or you can click Yes in the message, and then click Next to continue.

> Tip: Optionally, you can also do one or both of the following:

» You can click View Errors for more information.

» You can click Export Errors to export the errors in the import file and an XML format.

» The import file is complete and there are no issues with the file, so no message opens. Click Next to continue.

The second of three AIU windows opens. This window lists the academic Building and the Room that are currently reserved for all the classes in the import file. For a new import file, the Building/Room combinations have a status of Assigned or Do not Import. Unassigned classes must be assigned to a room in EMS. Classes with a status of “Do Not Import” are not to be assigned to a room in EMS.

5. Optionally, select a different View option and/or a different Building option to filter the information that is displayed in the window. (The default display is all views (Assigned, Unassigned, and Do not Import) for all buildings.)

6. Select an unassigned class, or CTRL-click to select the multiple unassigned classes, and then click Assign. The Room Selector dialog box opens.

7. On the Building dropdown list, select the building or view by which to filter the available rooms list.
8. On the Available rooms list, select the room to which the classes are to be assigned, and then click OK. Two results are possible:

» If you selected a single class to assign to the room, then the class status is changed to Assigned in the AIU window. The EMS Building code and EMS

room name are displayed for the class in the AIU window.

» If you selected multiple classes to assign to the same room, then a message opens asking you if you are sure that you want to assign all the selected items to the same room. Click Yes in the message. The class status is changed to Assigned for all the selected classes in the AIU window. The EMS Building code and EMS room name are displayed for the classes in the AIU window.

9. Click Next. The third AIU window opens. In the right pane, the window lists the dates for which bookings will be created for the selected classes.

10. Optionally, do one or both of the following:

» To add more booking dates, select the date in the left pane, and then click the Add button to open the Date Pattern dialog box and specify the date patterns for the bookings that should be created.

» To delete booking dates, select the date in the right pane, and then click Delete.

11. After you have added or deleted the necessary booking dates, click Finish. A message appears indicating that the session was successfully imported.
12. Click OK to close the message and return to the Sessions window.

EMS Desktop Client Deployment Options

This guide will walk you through the different options for deploying the EMS Desktop Client.

There are two different deployment options for the EMS Desktop Client:

1. Web Deployment
2. Easy Deployment with a Conventional EMS Desktop Client Deployment

For more information, see our Decision Guide: Web Vs Conventional Deployment or view our Webinar.

Decision Guide: Web Vs Conventional Deployment

WHAT ARE MY DEPLOYMENT OPTIONS?

There are two different deployment options for the EMS Desktop Client:

1. Web Deployment
2. Conventional Deployment

EMS DESKTOP WEB DEPLOYMENT

EMS Desktop Web Deployment (V44+ and V44.1) is an alternative method for installing EMS Desktop Client locally on individual user machines. This solution is not a replacement for the EMS Web Client (discontinued after V43), but rather, it is an alternative to using Microsoft® methods of deployment, such as SCCM. Administrators can use it to host EMS Desktop Client on a web server, with the ability to push the URL to

any EMS Administrators so they can download EMS Desktop Client without needing Administrative Privileges on their local machine.

The web deploy application is installed on your web server. The EMS Desktop Application is included within this installation. Once installed, end users point their web browsers to the EMS Web Deployment Application, which points them with a link to download the EMS Desktop Client. (See also: Configure Users). Once a user downloads and runs that link, the EMS Desktop Client is installed in the user's profile on that workstation. Once installed, the EMS Desktop Client will check the server for an updated version of the client each time the client is launched. If a new version is available, then it will automatically download and install the update.

CONVENTIONAL DEPLOYMENT

Conventional Deployment works like previous releases of EMS. The downloadable installer is in the form of a MSI file. Once the software is installed on the Admin Users workstation, it connects directly to the data-

base. optionally it can be configured to connect to the Desktop Client API included in the Web Deployment option.

Note: The Web Deployment method also adds an application layer (in the form of a web service), to the architecture of the application. Instead of the Desktop Client connecting directly to the Database server as it has in the past. All connections are routed through the Desktop Client API (Included with Web Deploy). this can add additional benefit for Security Considerations, or multi-region deployments. For further information on this feature is detailed here.

FEATURES OF EACH DEPLOYMENT METHOD

The table below outlines the features available between the two deployment methods.

FEATURE	DESKTOP WEB DEPLOYMENT	CONVENTIONAL DEPLOYMENT
Admin Rights required on	No	Yes

FEATURE	DESKTOP WEB DEPLOYMENT	CONVENTIONAL DEPLOYMENT
the workstation		
Number of installations per workstation	1 Per User	Once for all users of the workstation
Installation Location	Users Profile	Location can be specified during installation
Requires a Web Server	Yes	No
Can adopt customer specific, deployment procedures	No	Yes (Requires IT Assistance)
Able To deploy without	No	Yes (Requires IT

FEATURE	DESKTOP WEB DEPLOYMENT	CONVENTIONAL DEPLOYMENT
user intervention		Assistance)
Updates are handled...	From the Web Service on the server	Must be re-pushed to individual work-stations.
IT has control of when updates are pushed	Yes	Yes
Network Connection to the database	Desktop Client API	Direct TCP con-nection or Desktop Client API

Note: To enable SSL, you first make changes to the EMS Desktop Client .msi file. See Also: Enabling SSL.

Web Deployment

EMS Desktop Web Deployment is a new option to Server Version 44 (Released January 2016). This feature allows for easy deployment of the desktop to your end users. It also incorporates a central source for posting application updates. These updates are applied to your end users' computers automatically once deployed to the server.

This topic provides information on the following

- How Web Deployment Works
- Networking Components
- Optional Connections
- Architecture Diagram

EMS Desktop Web Deployment (V44+ and V44.1) is an alternative method for installing EMS Desktop Client locally on individual user machines. This solution is not a replacement for the EMS Web Client (discontinued after V43), but rather, it is an alternative to using Microsoft®

methods of deployment, such as SCCM. Administrators can use it to host EMS Desktop Client on a web server, with the ability to push the URL to any EMS Administrators so they can download EMS Desktop Client without needing Administrative Privileges on their local machine.

HOW WEB DEPLOYMENT WORKS

The web deploy application is installed on your web server. The EMS Desktop Application is included within this installation. Once installed, the end users point their web browsers to the web deploy application, which links them to download the EMS Client. Once the user downloads and runs that link, the Desktop Client is installed within the user's profile on that workstation. Once installed, the EMS Desktop Client Application will check the server for a updated version each time the client is launched. If a new version is available, then it will automatically download and install the update.

NETWORKING COMPONENTS

- The Web Server can be accessed by IP Address or Hostname. Port configuration is managed within IIS.

- If HTTPS is leveraged you will need to have a Certificate assigned to the binding within IIS. This certification must be trusted by the workstations that will be running the desktop client.
- The Web Server hosting the Web Deploy Application will need to have access to the Database server. The administrative users who will be leveraging the desktop client will need access to the Web Server.

OPTIONAL CONNECTIONS

The Desktop client can connect to these services:

- SMTP Server
- LDAP Server
- Global Address Book Searches
- Admin User Authentication
- Web Process Template Configuration (Assigning LDAP Groups to Web Process Templates)

ARCHITECTURE DIAGRAM

Conventional Deployment

WHAT IS CONVENTIONAL DEPLOYMENT?

The conventional deployment method is delivered in a typical MSI file. This file can be run directly on a computer, or installed via an administrative push. Standard toolsets for working with MSI files can be used for deployment. If your organization already has polices and systems in place for pushing applications, this may be the preferred way to deploy the desktop client. If you are looking for an easier way to deploy the desktop client, see Understanding EMS Desktop Client Web Deployment .

NETWORK DIAGRAM

Easy Deployment with a Conventional EMS Desktop Client Deployment

WHAT IS EMS "EASY DEPLOYMENT"?

This additional application layer on the Easy Deployment with a Conventional EMS Desktop Client Deployment simplifies the deployment process for administrative users so they can deploy EMS Desktop Client software installations directly to their users' workstations. For an overview, see our webinar. It does this by running all database queries through a Web Service, which allows the database server to be isolated from the end user network. By using this tool, your users do not need to first navigate to the EMS web deploy website and download the application to their local profile.

WHAT ARE MY DEPLOYMENT OPTIONS?

EMS Deployment is a process you can use to programmatically deploy software to your end user workstations, either via the web or using conventional methods. See the Web Deployment VS Conventional Deployment Decision guide to understand how we can handle that process for you. We recommend implementing a deployment method in order to minimize additional legwork to roll out the EMS Desktop Client to your organization.

HOW A DEPLOYMENT CHANGES STANDARD CONFIGURATIONS

Standard Configuration

Configuration after completion of this topic

PREREQUISITES FOR EASY DEPLOYMENT

- EMS Desktop Client installed on end users' machines
- EMS Web Deploy Service installed on a web server so end users are able to access it
- A method to remotely push a registry value into end users' registries

MODIFY THE EMS WEB DEPLOY SERVICE

By default, once you install the Web Deploy Service, users will be able to download and run the desktop client directly from that service. To prevent that, you should delete or rename the install.html file within that service. This will prevent clients from being able to download the client and ensure that you can maintain the desktop installations via your application delivery policy. This will also keep the application running outside the users' network.

MODIFY THE DESKTOP CLIENT

To connect the Conventional Desktop Client to to the web service instead of directly to the database, you will need to add a String Value named "AppFacadeUrl" to the users' registry:

HKEY_CURRENT_USER\SOFTWARE\EMS Software\Version 44.1

The Value of this String will be the URL to the Web Servic. For example: "http://yourwebserver.domain.local/em...ktopwebdeploy/"). Once that key is in place, any server and database keys are ignored. To

revert back to a direct database connection, simply delete the Registry Key "AppFacadeUrl"

UPDATES

Once the Conventional Desktop client points to the Web service for Connection to the database, it will not auto-update. When it comes time to deploy a new build of the software, you will need to install the updated Web Deploy Version to update the web server side, then push the updated local client from the updated MSI file, and deploy it using your standard installation methods. See Conventional EMS Desktop Client Deployment for further information.

Enable SSL on Web Deployment

To use EMS client web deployment with SSL, you need to perform a few extra steps (mentioned below) before you can install the desktop client. By default EMS desktop client web deployment is enabled to use with HTTP. To enable SSL, do the following:

1. Install EMSDesktopClientWebDeploySetup.msi
2. Go to EMS web deploy' s virtual directory and open web.config in a notepad. Find the following sections:

SECTION 1

<services>

<service name-
e="EMS.AppFacade.AppFacadeService">

```
                    <endpoint address-
s="../AppFacadeService.svc" binding="webHttpBinding" bind-
ingConfiguration="webBinding"
contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior"/>

                    <!-- <endpoint address-
s="../AppFacadeService.svc" binding="webHttpBinding" bind-
ingConfiguration="webHttpsBinding"
contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior" /> -->

                </service>

            </services>
```

3. Uncomment the highlighted section by removing “<!–“and “-->” from the beginning and end of that statement.
4. Then comment the first section instead by adding <!– and --> to the beginning and end of that statement. The end result will be:

```
<services>
                    <service name-
e="EMS.AppFacade.AppFacadeService">
                        <!--<endpoint address-
s="../AppFacadeService.svc" binding="webHttpBinding" bind-
ingConfiguration="webBinding"
contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior"/>-->
                        <endpoint address-
s="../AppFacadeService.svc" binding="webHttpBinding" bind-
ingConfiguration="webHttpsBinding"
contract="EMS.AppFacade.IAppFacadeService" beha-
viorConfiguration="webBehavior" />
                    </service>
            </services>
```

SECTION 2

<webHttpBinding>

```
<binding name="webBinding" maxReceivedMessageSize="2147483647"/>

<!-- <binding name="webHttpsBinding" maxReceivedMessageSize="2147483647" >

<security mode="Transport">

<transport clientCredentialType="None"/>

</security>

</binding> -->

</webHttpBinding>
```

5. Uncomment the highlighted section by removing “<!–“and “-->” from the beginning and end of that statement.
6. Then comment the first section instead by adding <!– and --> to the beginning and end of that statement. The end result will be:

```
<webHttpBinding>

                    <!--<binding name="webBinding"
maxReceivedMessageSize="2147483647"/>-->

                    <binding name="webHttpsBinding"
maxReceivedMessageSize="2147483647" >

                     <security mode="Transport">

                          <transport cli-
entCredentialType="None"/>

                     </security>

                    </binding>

               </webHttpBinding>
```

7. Once you have modified these sections, save the web.config file and browse to EMS Desktop Client web deploy then install the EMS Desktop Client.

Troubleshooting

If you experience a delay on the "first click" of major functions within the EMS Desktop Client that's too long, there are a couple of solutions. One approach is to leave EMS running all day so that you only experience the first click delay once. Another approach, which is a bit more involved, is to run a function within .NET called NGen. This function pre-compiles .NET applications to make them load significantly faster and eliminate first-click delays.

RUN NGEN

> Note: You must have installed EMS and you must have administrative privileges to perform the following steps.

> Warning: While NGen eliminates the first click delay, EMS will not be adding it to our standard installation process; this is an optional work-around you take at your own risk.

1. Open a command prompt as an administrator. To do this, press the Windows key, type "cmd" without the quotation marks, position the cursor over "Command Prompt" as shown in the screen shot below, right click, and select "Run as administrator."

Best match
Command Prompt
Desktop app
Run as administrator
Open file location
Pin to Start
Pin to taskbar
Web
cmd
cmd

2. At the C:> prompt, go to the directory where EMS is installed. If you have conventionally installed EMS, then it's typically at the following location:

cd \program files (x86)\EMS

However, if you're using the web deployment option to install EMS, then you should find EMS at the following location:

cd %appdata%\EMS2016\EMS

3. Press Enter and you should see one of the following (where [user name] is your Windows user name):

C:\Program Files (x86)\EMS>

C:\Users\[user name]\AppData\Roaming\EMS2016\EMS>

4. Type the following:

\windows\microsoft.net\framework64\v4.0.30319\ngen install ems.exe

5. Press Enter and wait until the process finishes. It will take about 5 minutes. Ignore any error messages.
6. When the installation finishes, you can close the command prompt and run EMS.
7. If you install a new or updated version of the Desktop Client, then you have to run NGen again if you want to eliminate the first click delay.