EMS FOR MICROSOFT OUTLOOK

Configuration Guide

V44.1

Last Updated: January 16, 2018

Table of Contents

EMS for Microsoft® Outlook Add-In Configuration Guide (V8)

This guide provides information on configuring EMS for Microsoft Outlook Add-in. EMS for Outlook is an optional add-in that integrates the EMS room reservation process directly with Microsoft Outlook 2010/2013.

> **WARNING:** To upgrade to Update 17 of EMS for Outlook, you will need to uninstall your legacy version and re-install.

The following topics are covered in the Microsoft® Outlook Add-In configuration guide:

» [Customize the Add-In Label](#)
» [EMS for Outlook System Parameters](#)

» Enable User Access to EMS for Outlook

» Assign EMS Users to Groups

» Establish Booking Templates for EMS for Outlook Users

Configure EMS for Outlook

You will need to configure special settings in EMS Desktop Client in order to activate the EMS for Outlook toolbar button for Outlook users. The add-in uses each Outlook user's EMS Everyday User account to establish their room booking privileges based on the Process Template(s) to which the Everyday User is assigned and EMS Group(s) for which the appointment can be booked.

Additional configuration tasks are required in order to enable your Microsoft Outlook users to access EMS for Outlook functionality:

» Customize the Add-In Label
» EMS for Outlook System Parameters
» Enable User Access to EMS for Outlook
» Assign EMS Users to Groups
» Establish Booking Templates for EMS for Outlook Users

CUSTOMIZE THE ADD-IN LABEL

1. Log into EMS Desktop Client.

2. Navigate to **System Administration** > **Settings** > **Parameters** and select the **Everyday User Applications** tab.

3. In the Area drop-down, select **EMS for Outlook - Specific**.

4. Select **EMS Room Scheduling** in EMS for Outlook and click **Edit**.

5. Make your changes and click **OK**.

6. Click **Close**.

> **TIP:** You can customize other field labels under the **ALL APPLICATIONS** tab (which means your customizations will apply to all EMS applications you deploy); filter the list by selecting **LABELS** in the Area field.

EMS FOR OUTLOOK SYSTEM PARAMETERS

In addition to changing the Add-in Label, you can use the following parameters to make additional changes:

PARAMETER	VALUE	DESCRIPTION
Display filters before showing rooms	Yes/No	For large organizations using templates in Outlook that have a large amount of locations, setting this to Yes can provide better performance and user experience.
Number of available rooms upon search in Outlook	Numeric (<500)	Controls the maximum number of results when searching for a room. For optimal performance, set to 50 or less.
Show attendees in	Yes/No	Allows users to see attendee and room availability on the Schedule View. Best

PARAMETER	VALUE	DESCRIPTION
book		practice includes setting this to Yes.
EMS for Outlook - Specific	Text	Customize the add-in label.

# ENABLE USER ACCESS TO EMS FOR OUTLOOK

> **IMPORTANT:** This topic assumes you have a working knowledge of configuration in EMS Desktop Client and highlights special tasks for enabling EMS for Outlook users. For more detailed instructions in creating new users, See Also: [Configure Everyday Users](#).

To enable EMS for Outlook for your Microsoft® Outlook users, you will:

1. Configure an active EMS Everyday User Account in the EMS Desktop Client.

2. Link the EMS Everyday User Account to an active EMS Group record.

3. (Optional) The **Delegates** tab allows you to associate a delegate to an EMS Everyday User. To assign a delegate in EMS for Outlook, that delegate must also be assigned in Exchange.
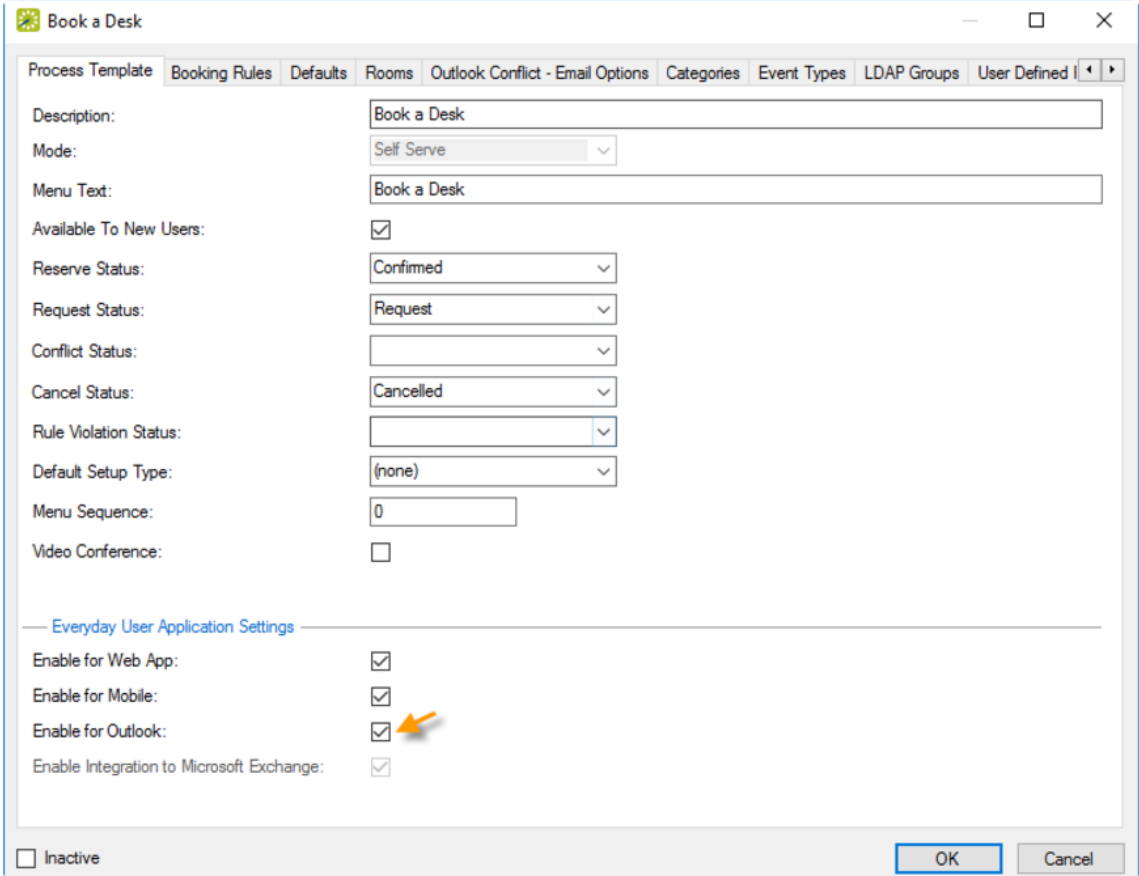
Delegates Tab
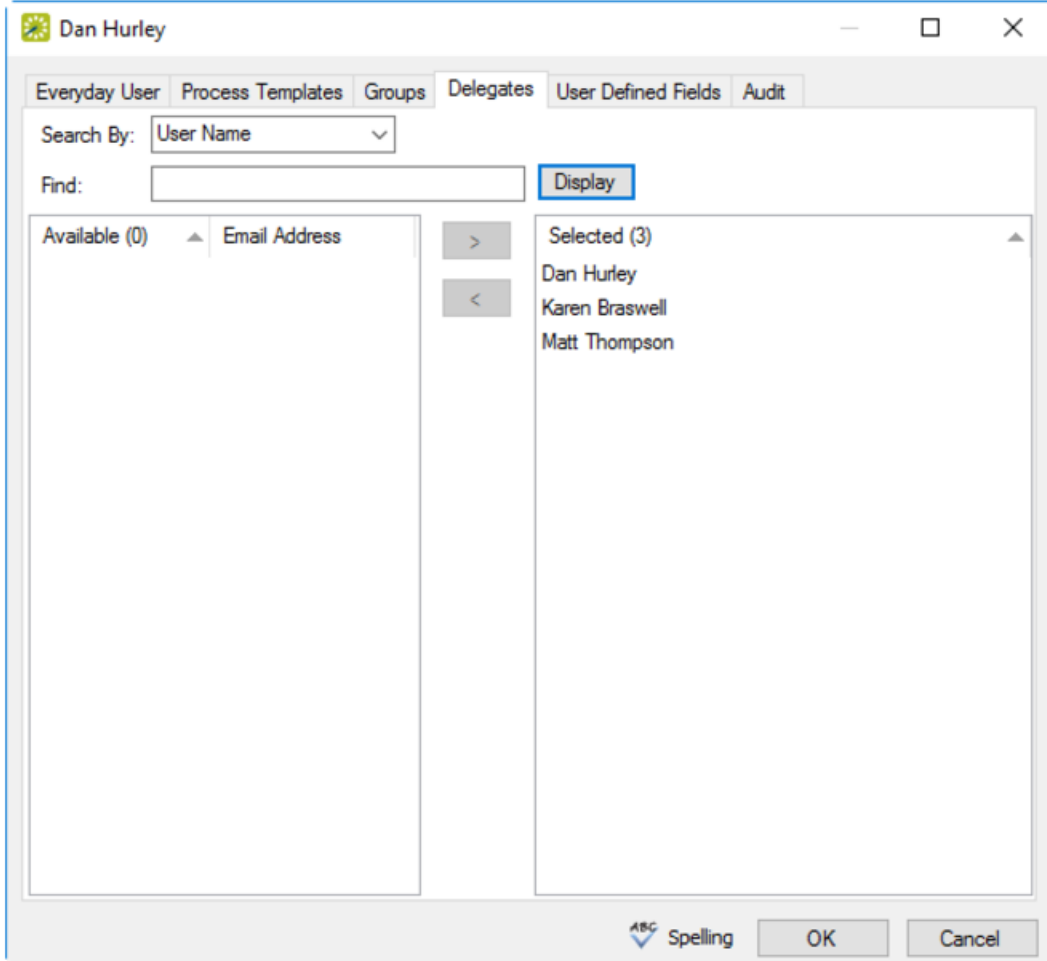
4. Assign at least one Everyday User Process Template to the EMS Everyday User Account.

5. Enable the **Outlook** option for the Everyday User Process Template you associated with the user.

NOTE: When Outlook is enabled, Integration to Microsoft Exchange is automatically enabled.
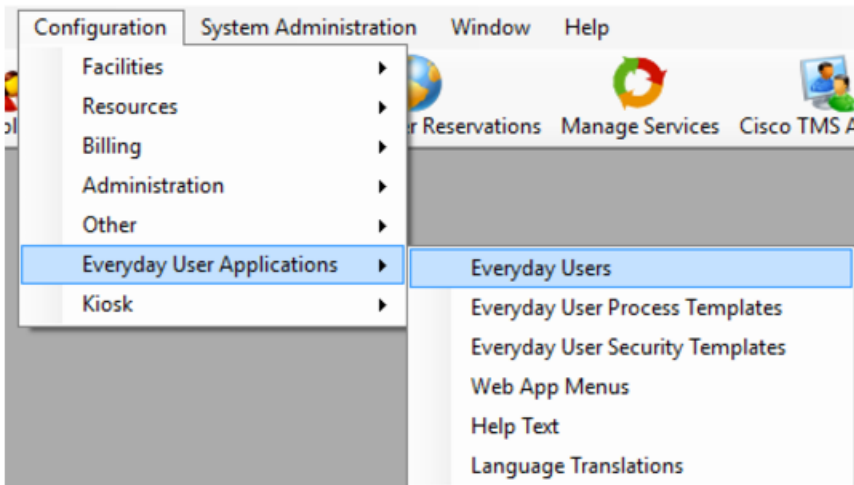
Process Template Tab

ASSIGN EMS USERS TO GROUPS

You assign users to see groups in EMS by modifying the group or the Everyday User accounts.

1. Navigate to **Reservations** > **Reservations** > **Groups**. (The **Groups** label can be modified by your system administrator.)

2. Select a **Group**.

3. Click the **Everyday User** tab.

4. Click **Edit**. In the dialog box, search for everyday user accounts to add/remove from a Group record.

The following alternate path is available to assign users to groups:

1. Navigate to the Everyday User's account on the **Everyday User** tab within **Configuration** > **Everyday User Applications** > **Everyday Users**.

2. Open the Everyday User's account by clicking the **Edit** button.

3. On the **Groups** tab, search for a Group to add/remove from an everyday user account.

ESTABLISH BOOKING TEMPLATES FOR EMS FOR OUTLOOK USERS

When Configure Everyday User Process Templates in the EMS Desktop Client, several options are specific to Outlook functionality. Once you

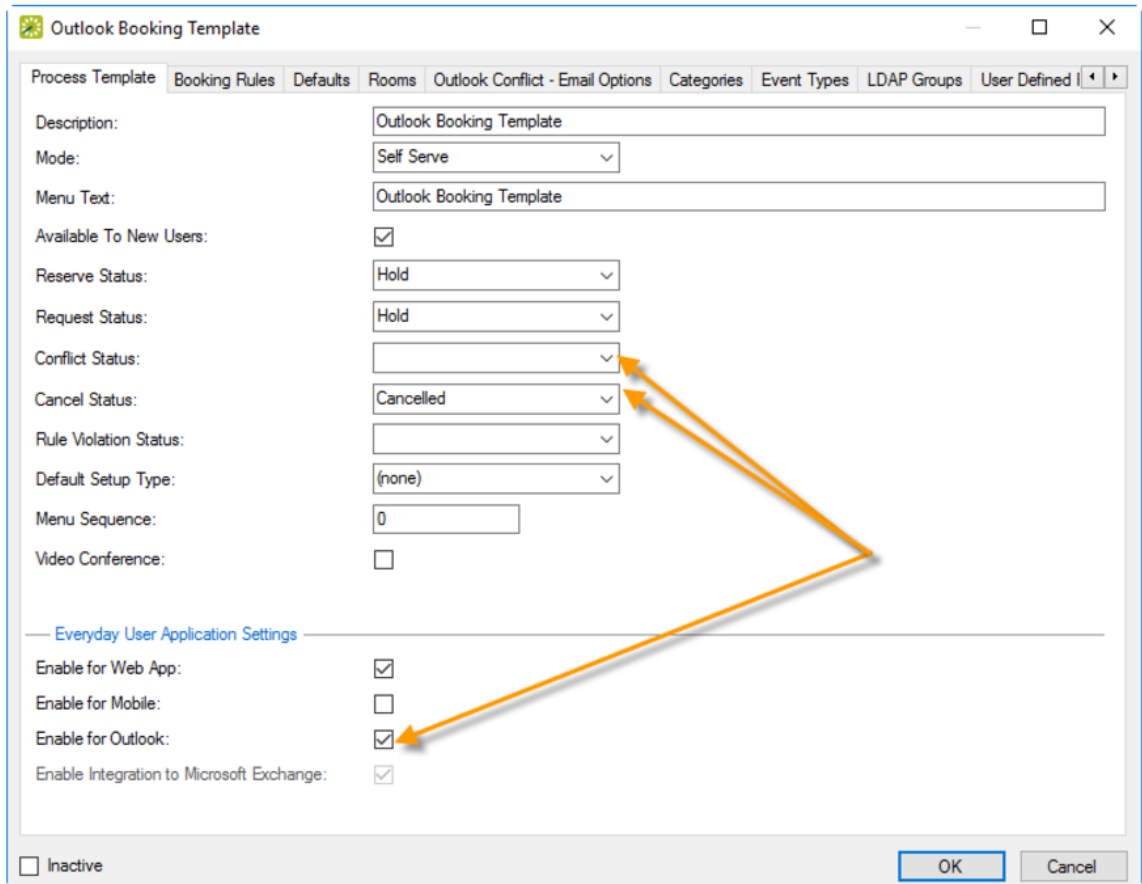have defined [Everyday User Process templates](#) as part of EMS Desktop Client setup, do the following to establish booking templates for EMS for Outlook users:

1. Click **Edit** on the Everyday User Process Template to fully enable and customize the EMS for Outlook Add-in.

2. Select the **Enable for Outlook** checkbox to enable the template to display to associated everyday users in the EMS for Outlook Add-in.

3. Select a status from the Conflict Status dropdown to determine the *type of conflict* status assigned to bookings made using this template that are in conflict.

4. Select a status from the Rule Violation Status dropdown to determine the *status of bookings* that have violated the template booking rules or category rules. This option is only available when **Enable for Outlook** is selected. When a user in EMS for Outlook requests a booking that violates a booking restriction, then the booking is changed to this status. For example, if a EMS for Outlook user requests a room two years in advance when the process template only allows a booking a year in advance, then the booking is set to the status you specify in this field (such as Rule Violation).

> **NOTE:** The values in this dropdown come from settings in the booking [Statuses](#) area of EMS Desktop Client.

New Booking Template Created for EMS for Outlook

5. Navigate to the **Outlook Conflict – Email Options** tab to control behavior for the see notification email sent to the Outlook user if a booking conflict arises during the process of booking through Outlook.

Outlook Conflict Email Options Tab