EMS WEB APP Configuration Guide

V44.1

Last Updated: August 14, 2018

Table of Contents

CHAPTER 1: EMS Web App Configuration Guide

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.

An EMS Desktop Client administrative setup and configuration for the EMS Web App is done in the EMS Desktop Client. You must have this application installed and administrator credentials to follow the instructions in this section.

CONTACT CUSTOMER SUPPORT

- **Option 1 (Recommended):** Search the Knowledge Base available in the EMS Customer Portal.
- **Option 2:** Submit a Case directly via the EMS Customer Portal.
- **Option 3:** Email support@emssoftware.com.
- **Option 4 (Recommended for critical issues only):** Phone **(800) 288-4565.**

IMPORTANT: If you do not have a customer login, register here.

CHAPTER 2: Configure Everyday Users

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 Assign Templates to an Everyday User.
- To assign multiple templates to multiple users in a single step, see Assign Templates to Multiple Users.

> **TIP:** You configure EMS Desktop Client user accounts in a different area (under the **System Administration** > **Security** menu). For instructions, see Configure EMS Desktop Client User Accounts.

Additionally, if your organization uses EMS Human Resources Toolkit to manage Everyday User accounts, See Also: 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.

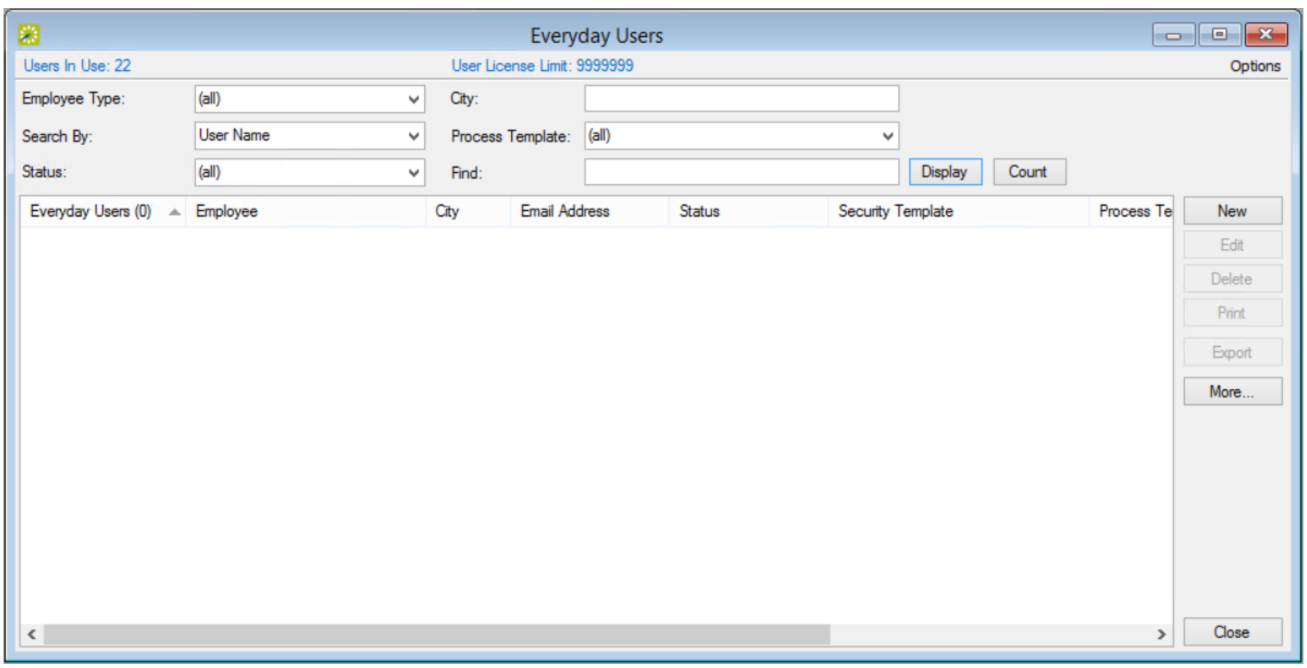
Concept: EMS classifies users into two categories: Guests or Visitors and Everyday Users.

"Guests" or "Visitors" (unauthenticated or anonymous users) can browse events, see details about your organization's space, and/or submit requests. These users can register themselves through EMS Web App and create a user account. To enable this, you need to set certain account management parameters (see EMS Web App System Parameters) and select the Credit\Edit an Account role for the unauthenticated user (see the **Roles** tab definition in Configuring a security template).

"Guests" or "Visitors" (authenticated users) may also submit and manage reservations if you enable them. You can configure these users through the EMS Desktop Client or the optional Integrated Authentication module. See Also: Creating a User from a Group and Creating a User from a Contact. Before you configure a user, check that the user has not already been created.

TIP: Everyday User process templates control access and behavior in EMS Software's Everyday User Applications. If you are upgrading from an older release of EMS, you may recognize Everyday Users as "Web Users" and "Everyday User Process Templates" as "Web Process Templates."

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**

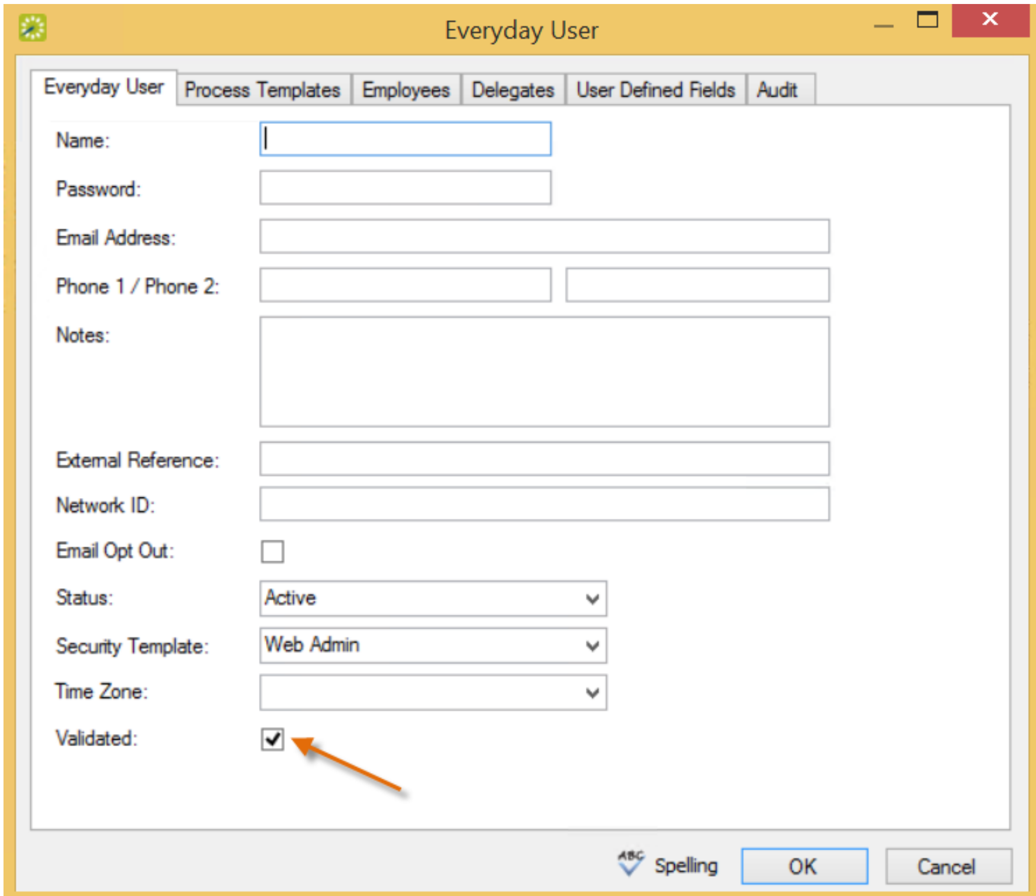
Then **Click Display**; search results show in the lower pane of the window. If your user does not already exist in EMS, proceed to the next step.

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.

3. 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. If the user had to answer questions when requesting an account, you can view the user's responses on the **User Defined Fields** tab.

Everyday User Dialog



TIP: 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.

4. 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.

Everyday User Tab Field Descriptions

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.
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 receive manually sent emails.
Status	Required field. Select the status for the user:

FIELD	DESCRIPTION
	» 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 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, 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.

CHAPTER 3: Configure Groups and Contacts from an Everyday User

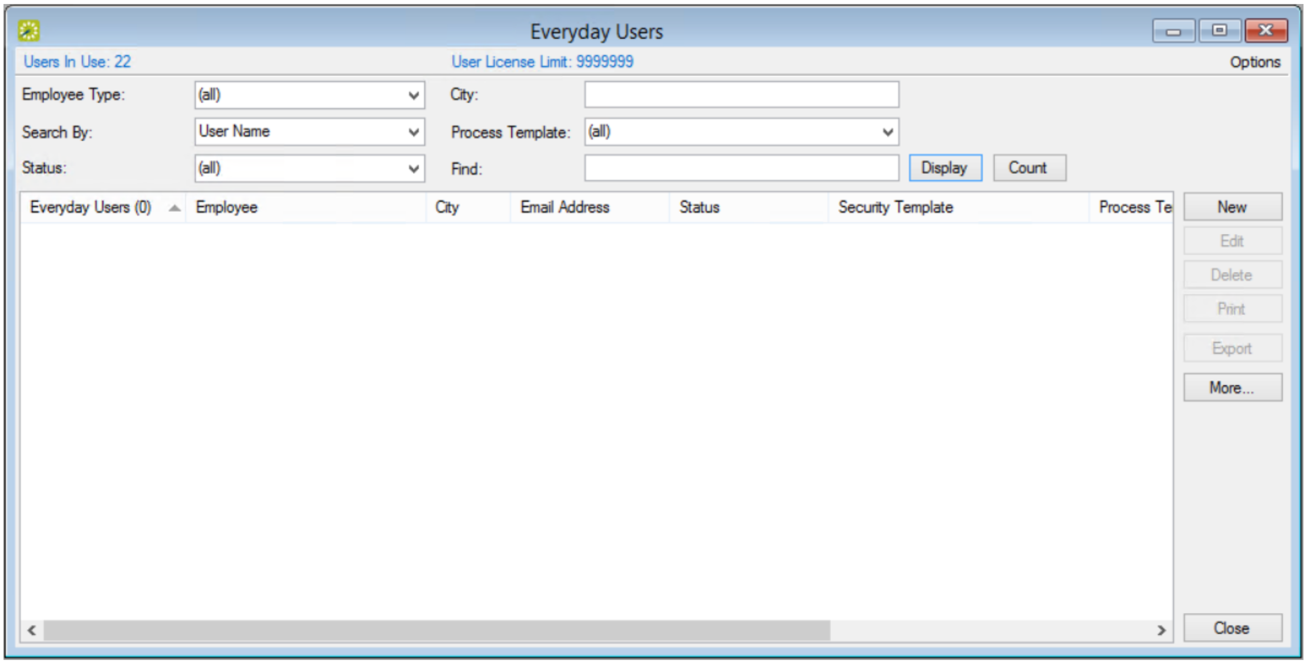
This topic provides information on the following:

CREATE GROUPS AND CONTACTS FROM THE 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.

Everyday Users Window



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.

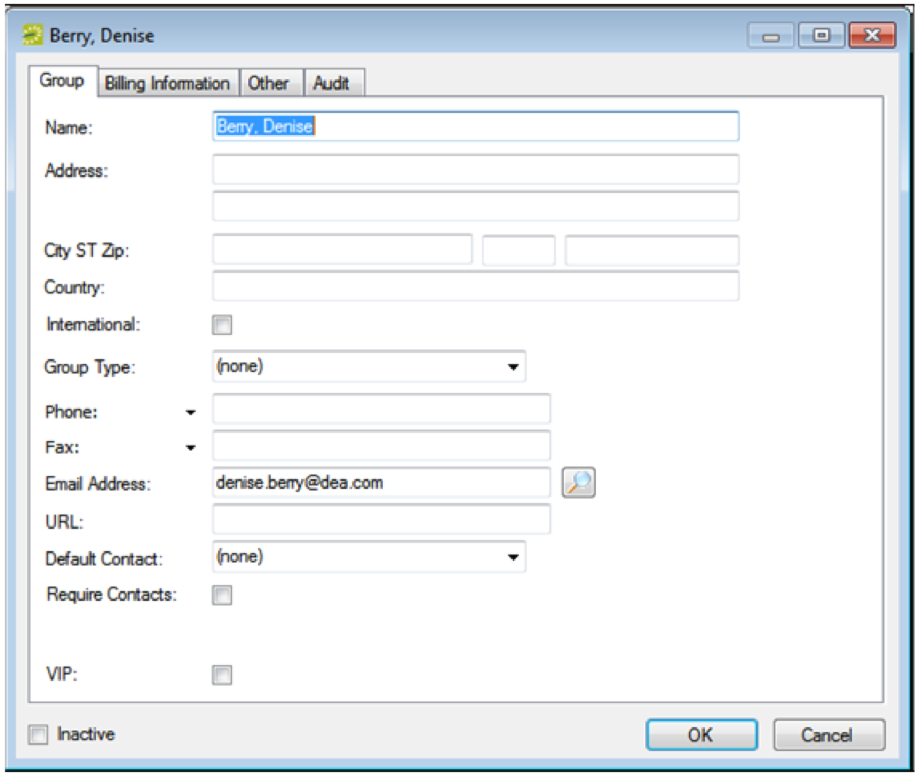
> **TIP:** If you leave the **Find** field blank, a list of all currently active users appears. This field is not case-sensitive, but entries must be in the correct order. For example, a search string of Bar returns Barry Jones, but not Amanda Barry.

3. Continue to one of the following:
   - Configure a Group from a User
   - Configure 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.

Group Tab

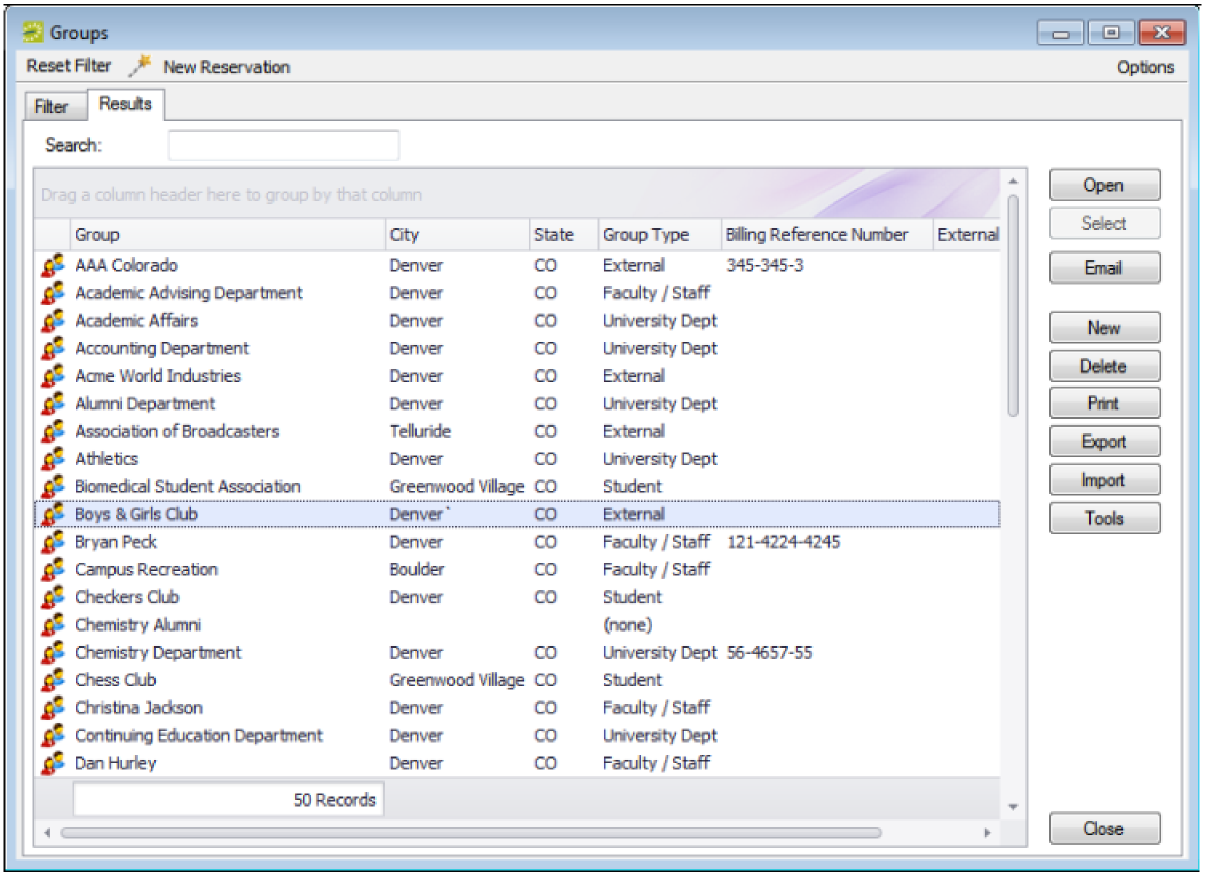


2. Configure the new Group as needed. See Configuring Groups.

CONFIGURE A CONTACT FROM A USER

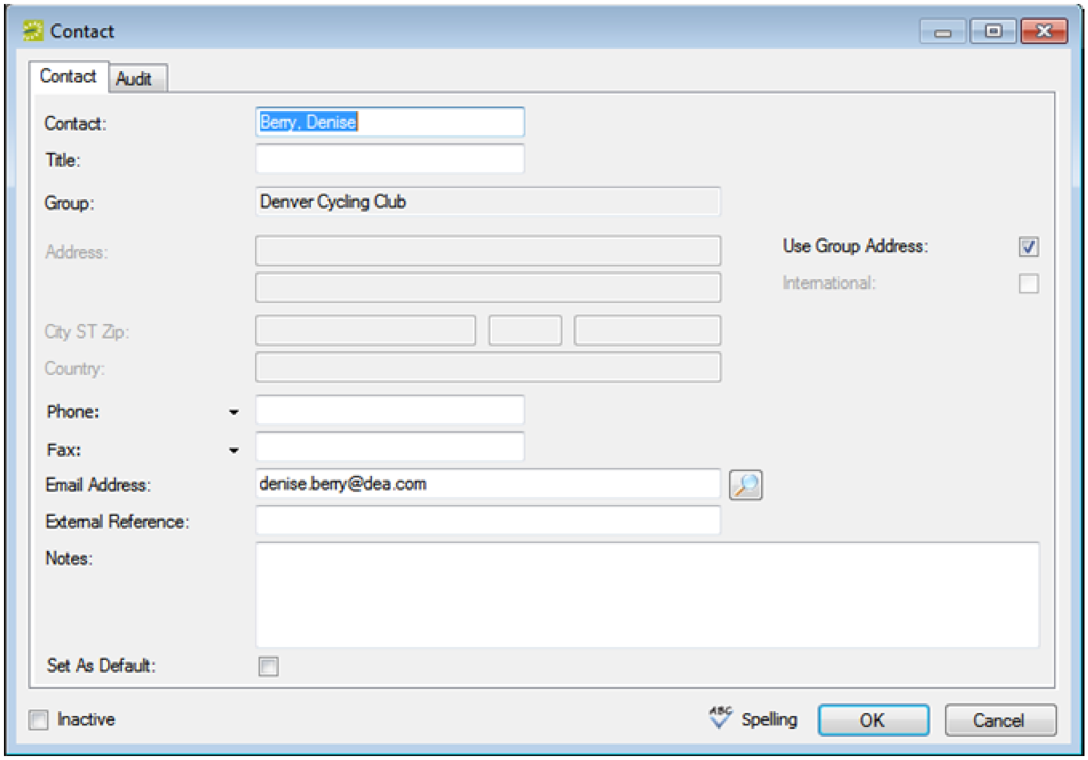
1. Select the user from which you are creating a contact, and then click **More > Create Contact**. The Groups window opens.

Groups Window, Results Tab



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.

Contact Dialog Box



4. Enter the information for the new contact.

TIP: You can click **Spelling** to spell-check before saving.

Contact Tab Field Descriptions

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. 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 and 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 dia-

FIELD	DESCRIPTION
	log box and search for the email address.
External Reference	Links the contact to an outside program or another EMS record if needed.
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. » Notes: 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. » 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 de-activate the Contact.

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.

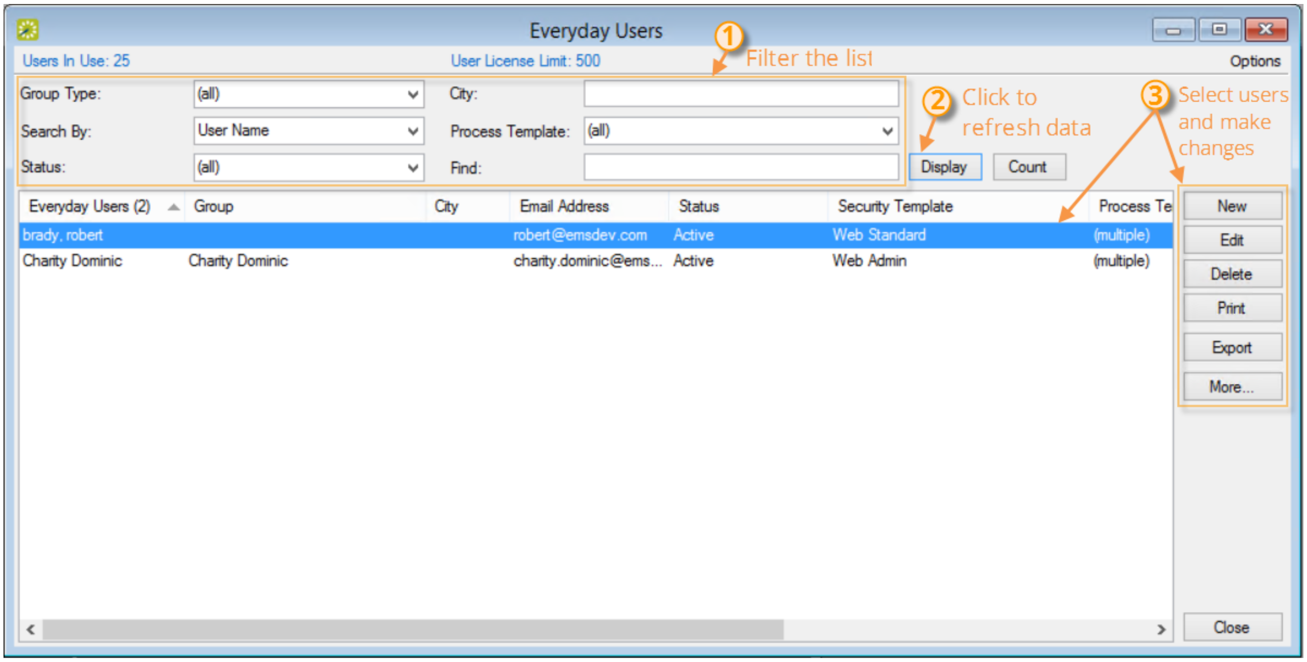
CHAPTER 4: Licensing for Everyday Users

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 EMS Desktop Client.

> **NOTE:** If you have previously used older versions of EMS, you may know these templates as "Web Process Templates." These templates are now called "Everyday User Process Templates."

1. Select the **Configuration** > **Everyday User Applications** > **Everyday Users** menu.
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**.

Everyday Users Menu



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.

CHAPTER 5: Configure Everyday User Templates

This topic explains the process of assigning your users to security profiles and booking templates.

> **NOTE:** If you have previously used older versions of EMS, you may know these templates as "Web Process Templates." These templates are now called "Everyday User Process Templates."

Concepts: Everyday User, Everyday User Template, Security Template, and Process Template Explained. *Click for more...*

- **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).

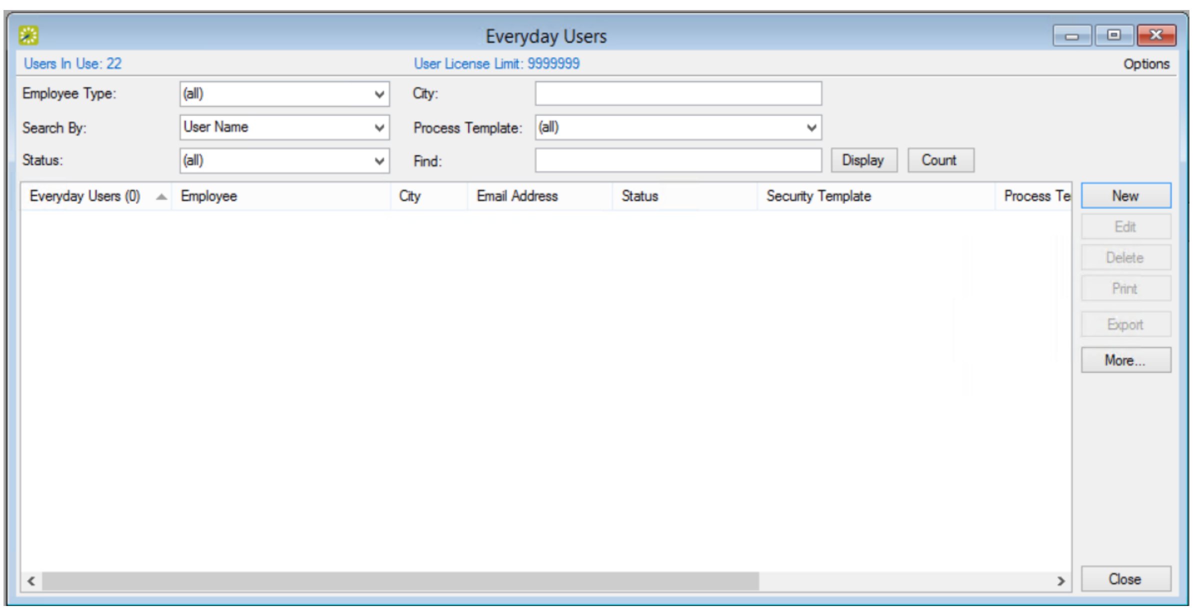
To configure Everyday User templates, you will need to do the following:

- Configure Everyday Users
- Configure Everyday User Process Templates

CHAPTER 6: Assign Process Templates to an Everyday User

> **TIP:** 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 Assign Web Templates to Multiple Everyday Users.

1. On the EMS menu bar, click **Configuration** > **Everyday Applications** > **Everyday Users.** The Everyday Users window opens.

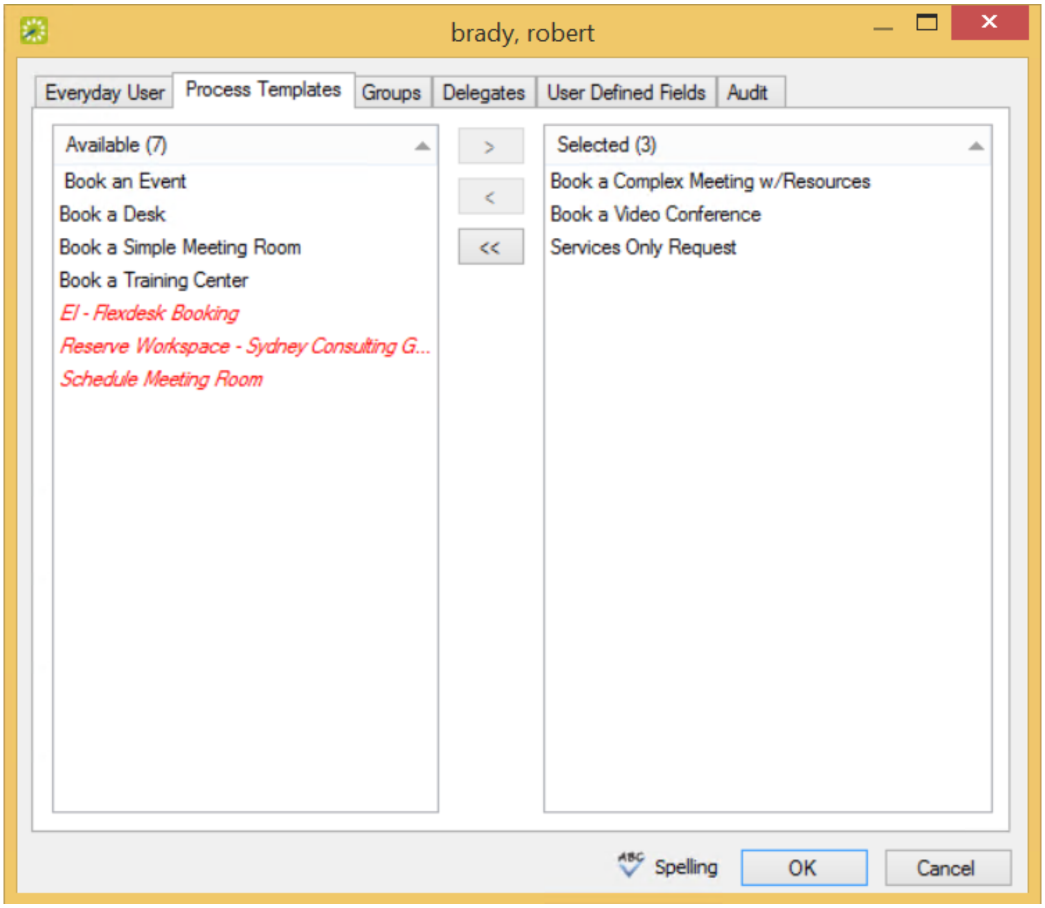


2. In the **Find** field (in the upper portion of the screen), search for the user to whom you wish to assign Everyday User process templates by entering at least the first three characters of their user name or email.

> **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



2. 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."
3. Click **OK**. The Everyday Users dialog box closes and returns you to the Everyday Users window.

CHAPTER 7: Configure Everyday User Process Templates

Concept: "Web Process Templates" Are Now Called "Everyday User Process Templates"

If you have previously used older versions of EMS, you may know booking templates as "Web Process Templates." These templates 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."

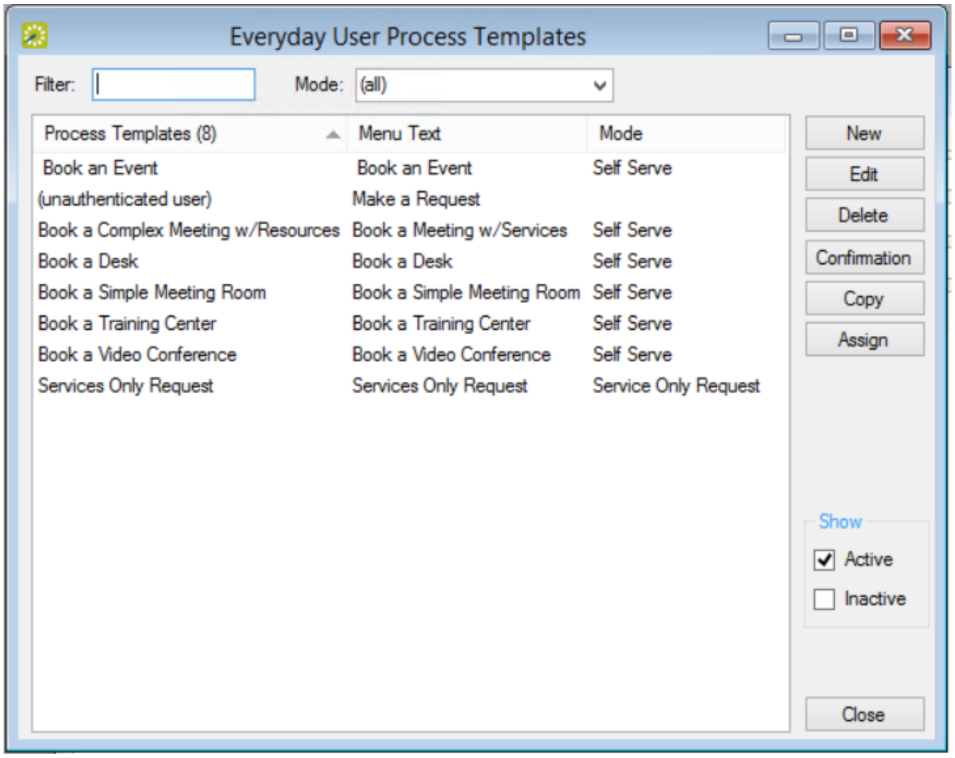
See Also: Configure Security Templates

NOTE: In EMS Enterprise, the guest (unauthenticated user) everyday user process template is always available and you can have an unlimited number of other everyday user process templates. In EMS Professional, the (unauthenticated user) everyday user process template is always available, but you can have only two additional everyday user process templates.

To configure Everyday User process templates, complete the following steps:

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.

Everyday User Process Templates Window

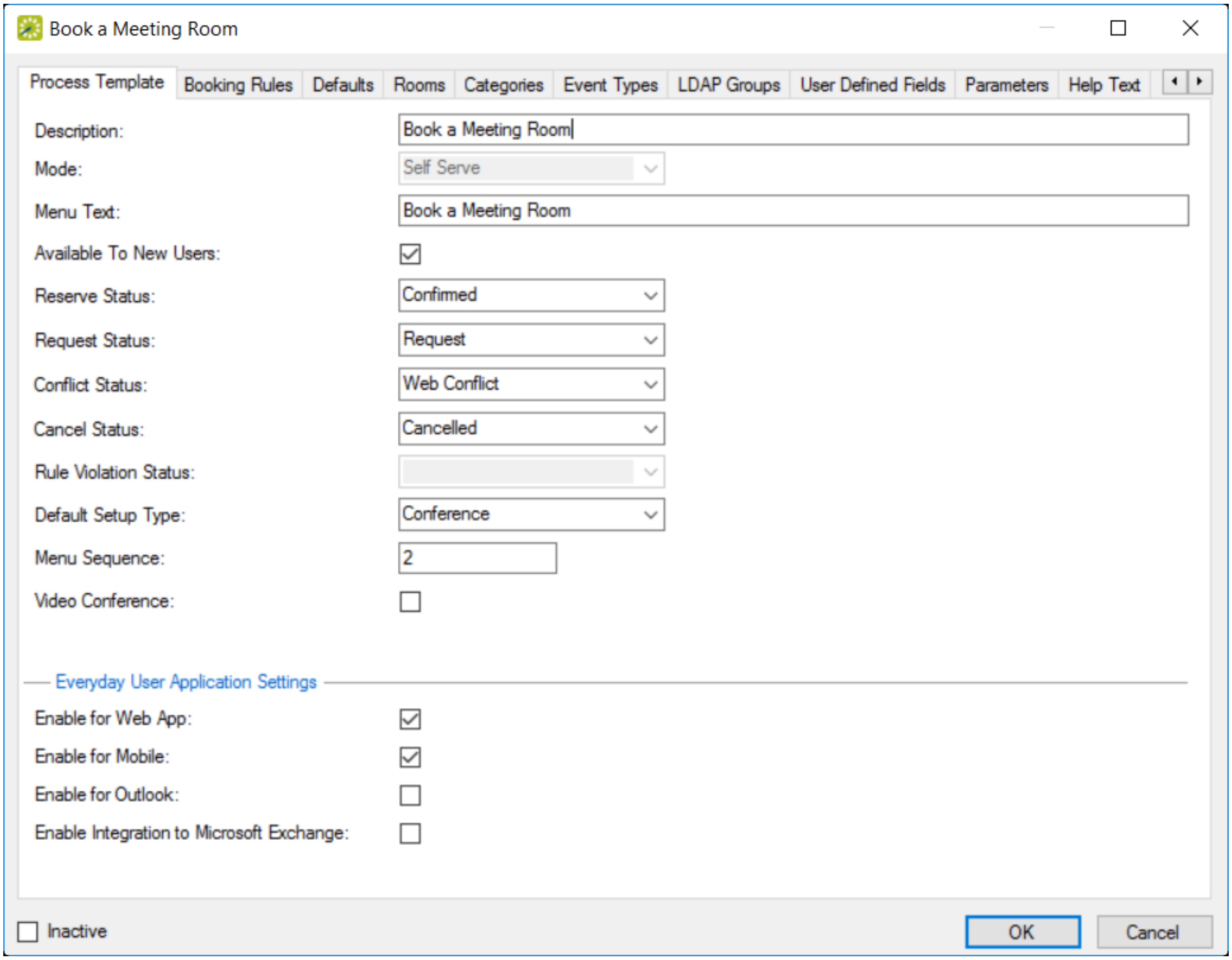


This window lists the process templates that have been defined for your EMS Web App implementation. The pre-defined user called "unauthenticated user" is included in all EMS implementations; you use this template to manage settings for anonymous or “guest” users. For a user to be able to view and use this template, you must assign the user to the template. See Configure Everyday Users.

> **TIP:** To view all everyday user process templates in your EMS database, regardless of status, under Show, click **Inactive**.

2. Click **New**. The Book a Meeting Room configuration dialog box displays. Enter the information for the new everyday user process template as needed. See Everyday User Process Template Field Definitions for more information on the tabs in the Book a Meeting Room configuration dialog.

Book a Meeting Room Configuration Dialog



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.

TIP: You can use the Request/Approval Model to Oversee "Managed Space." For more information, see Configure Managed Space.

NOTE: In the Everyday User Application Settings section:

- **Enable for Web App** means enable the template on EMS Web App.
- **Enable for Mobile** means enable the template for the EMS Mobile App.
- **Enable for Outlook** means enable the template for the 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.
- **Enable Integration to Microsoft Exchange** means enable the template for Microsoft® Exchange when your organization does not use EMS for Outlook.

See Also: Everyday User Process Template Field Definitions.

You can continue configuring the booking template on additional tabs or just click **OK** to save your changes.

SAVE YOUR TEMPLATE SETTINGS

When you have completed entries in all tabs as desired, click **OK**. Your changes to the everyday user templates are saved.

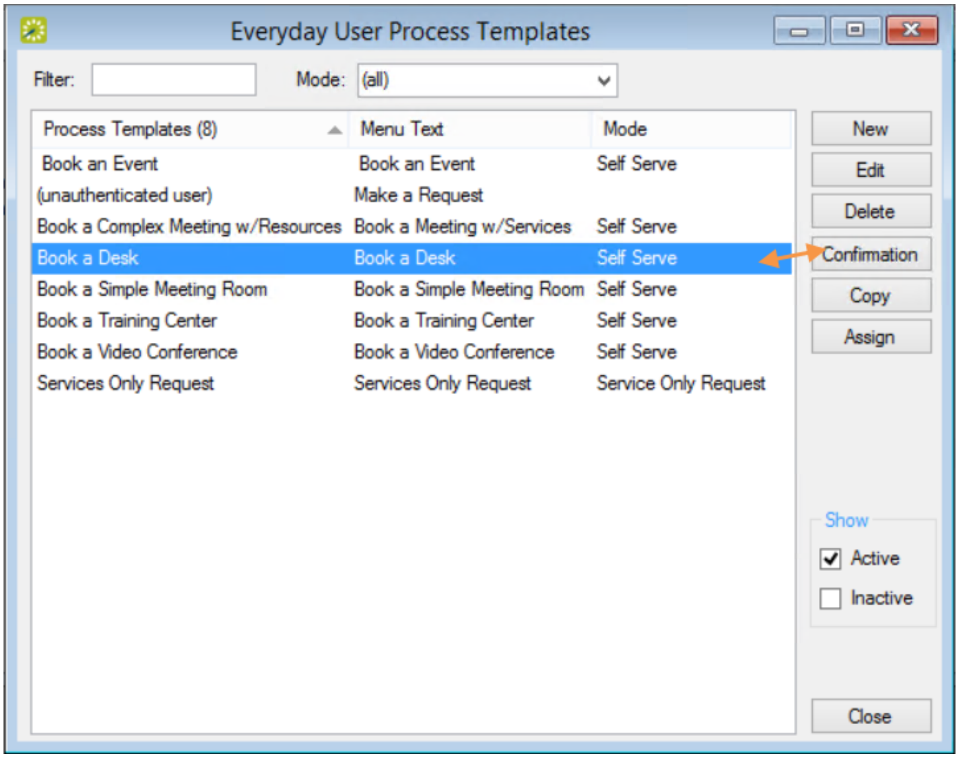
TIP: Make sure that you have defined your everyday users so you can assign them to your everyday templates. See Also: Configure Everyday Users

CHAPTER 8: 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.

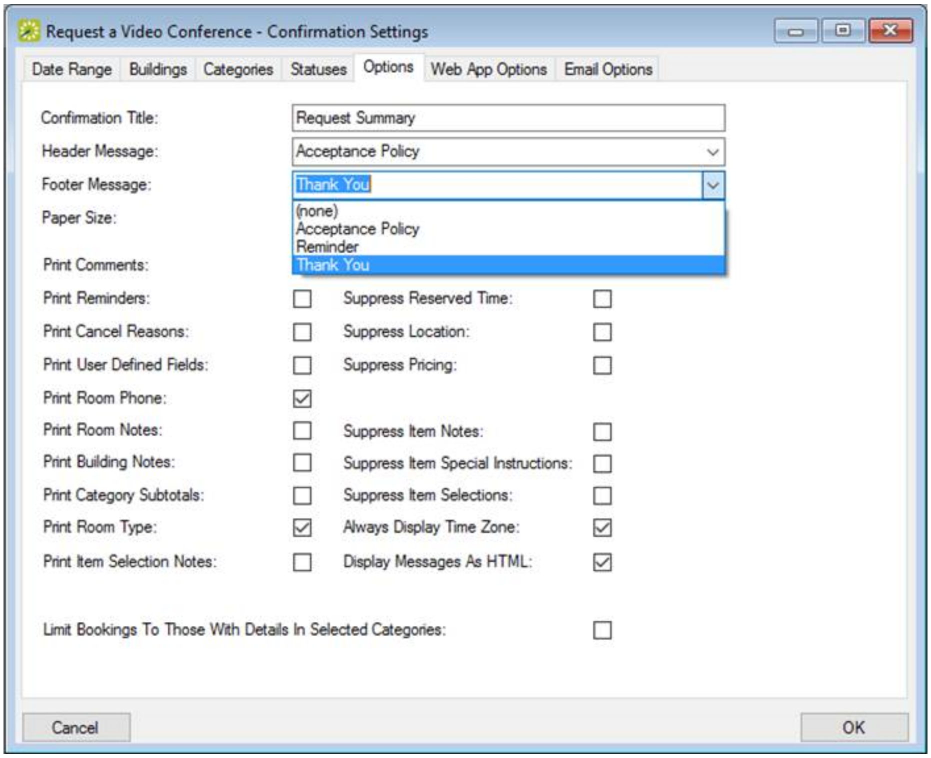
1. To customize the behavior of this type of confirmation, from the Everyday User Process Templates window, select the template for which you wish to customize a confirmation.
2. Click **Confirmation**.

Everyday User Process Templates Window



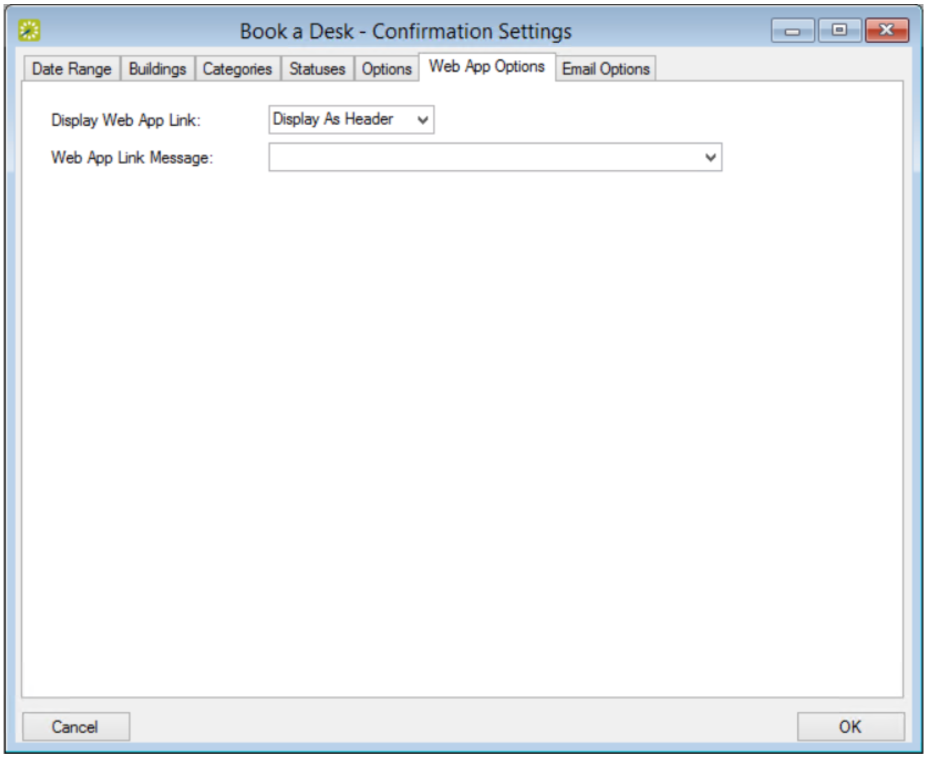
3. The Confirmation Settings window appears for this template. Click through the tabs specifying your Confirmation Settings.
   - Use the **Options** tab to set an email header and email footer for pre-configured messages (which you set under **Configuration** > **Other** > **Messages**).

Setting Email Header and Footer in the Options Tab



» 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: Configure the Confirmation Email Subject Line.

Specifying EMS Web App Link Settings in the Web App Options Tab



EMS Web App Link Settings Fields

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.

TIP: To understand how the Desktop Client user encounters these confirmations, see Confirmations.

CHAPTER 9: Configure Managed Space

Once you have configured facilities (rooms, categories, services, resources, and so on), you can configure special process templates for "managed space," which is meeting space that may require additional oversight and an approval process to finalize a reservation. For example, you may wish to configure a large banquet hall as managed space to ensure that any request to use it is approved by a supervisor. That supervisor would use the Dashboard from the EMS Desktop Client menu bar to view requests for space.

Typically, managed space involves services, expenses, and invoicing that affect multiple stakeholders and departments, and templates designed for this model are typically assigned to Everyday Users of EMS Web App. By contrast, such templates are **not** recommended for assignment to EMS for Outlook users since Microsoft® Outlook does not show the request status of such a reservation.

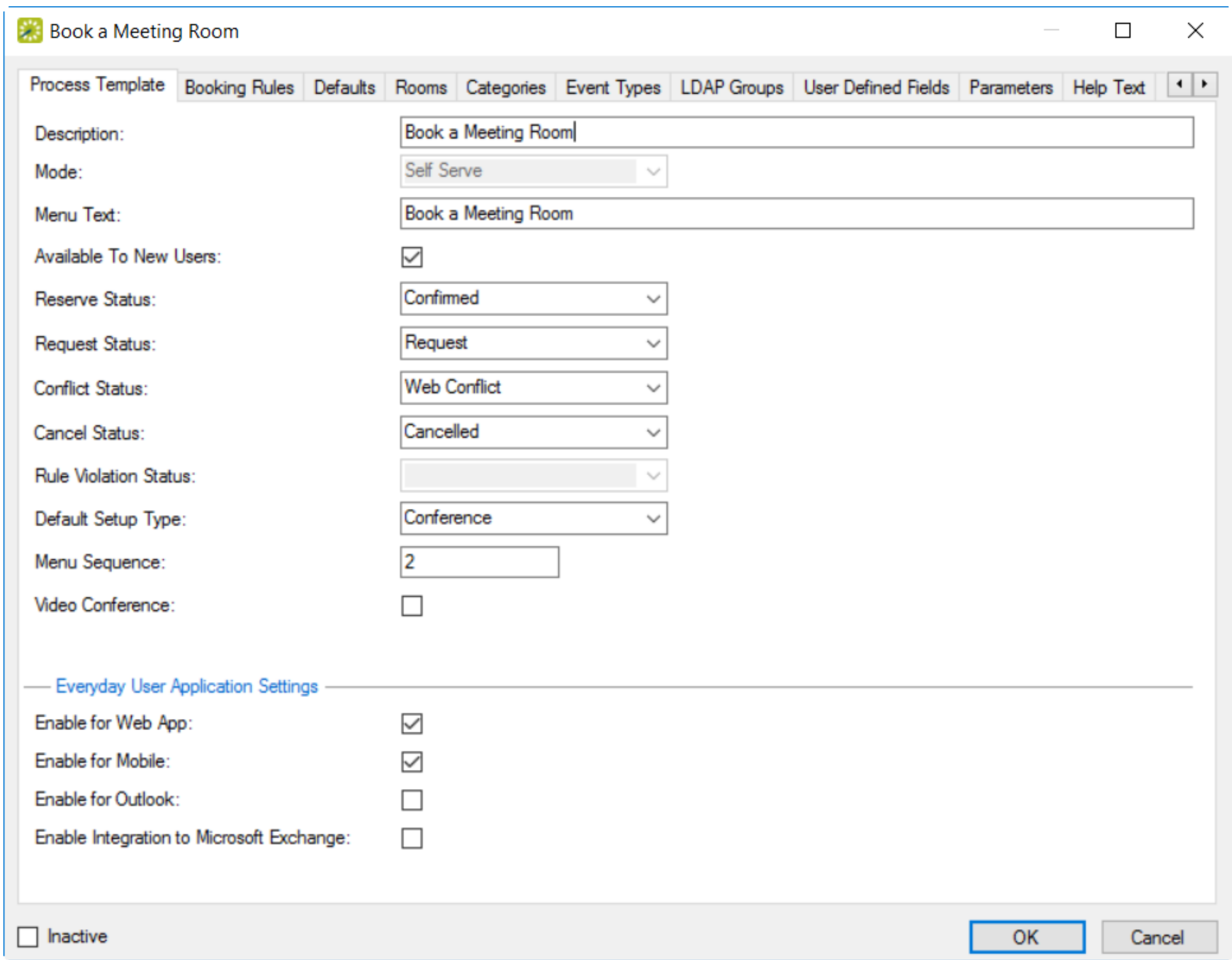
To configure a process template to require supervisory approval:

- When defining an Everyday User Process template for a specialized type of space or room, you set the **Request Status** field to Request (so it will show as pending in the Dashboard).
- Assign that template to the appropriate everyday users (typically, EMS Web App users so they can only Request reservations for that specialized space.
- Designate users in EMS Desktop Client who will review and approve this type of space request in the Dashboard.

CHAPTER 10: Everyday User Process Template Field Definitions

This topic provides information on the following:

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 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.
Available to New Users	Select this option if this everyday user process template is to be automatically assigned to newly registered users.

FIELD	DESCRIPTION
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).
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 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.

FIELD	DESCRIPTION
	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. **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.
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 Microsoft 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.

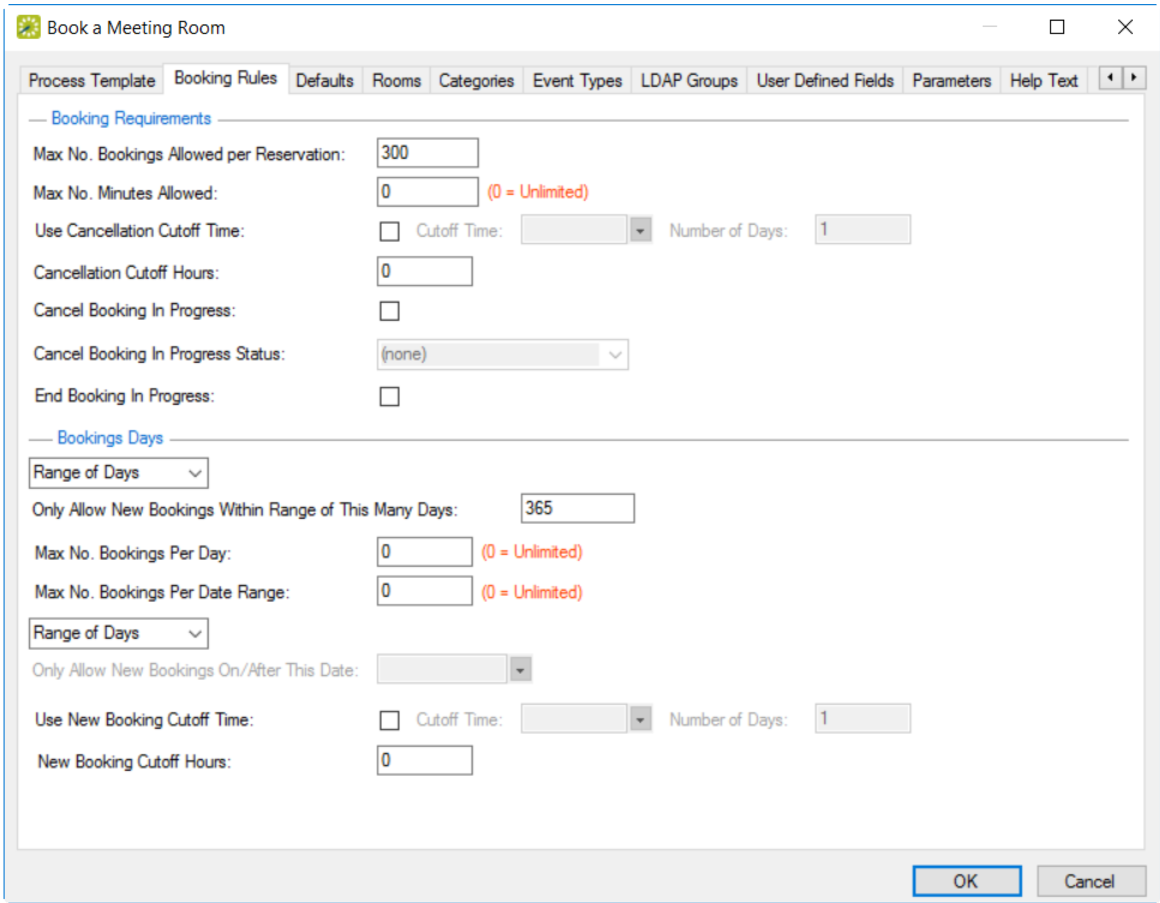
BOOKING RULES TAB

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



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 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 Pro-	Sets the status for bookings that are canceled when in progress.

FIELD	DESCRIPTION
gress 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

FIELD	DESCRIPTION
	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.
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.
	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

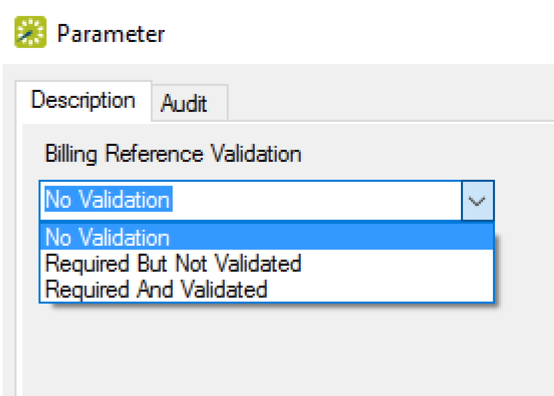
You can use this tab to control the behavior of your implementation's customized fields for this template by moving one or more from the Available pane to the Required or Optional panes. These fields are pre-configured. See Also: Configuring User Defined Fields (UDFs).

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.

CHAPTER 11: Security Templates

A security template specifies which menu items are available to the users who are assigned to the template, which fields can be viewed in event tooltips, and other information.

In this section:

CHAPTER 12: Configure Everyday User Security Templates

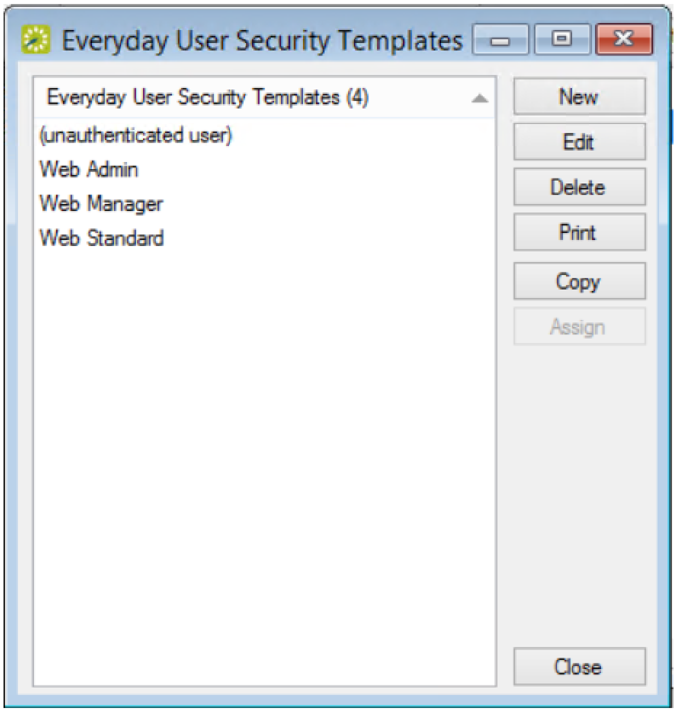
A security template specifies which menu items are available to the users who are assigned to the template, which event information fields can be viewed, and other information.

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 Window

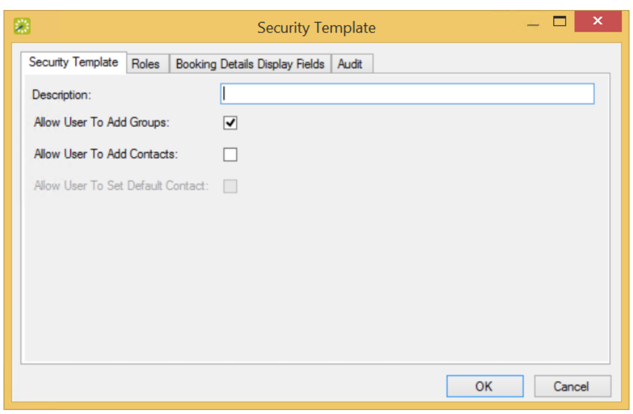


NOTE: The "(unauthenticated user)" role controls what happens when users do not have a log in access an EMS Everyday User application such as EMS Web App and EMS Mobile App.

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.

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. 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 Contact	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 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.
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 Web App everyday users.
Browse People	Allows an 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.

ROLE	DESCRIPTION
View Floor Map	Requires the optional Floor Plan module. Allows a EMS Web App user to view and book rooms on a floor plan.
View Reservation Summary	Allows an EMS Web App user to view the Reservation Summary page when the user clicks on the link from notification/confirmation emails. Note that the reservation owner, or delegate of the owner, can view the Reservation Summary page through the email link even if the role has not been assigned. Administrators can use the View Reservation Summary role to limit access to reservation information from forwarded emails.
Web Administrator	Provides access to various administrative functions within EMS Web App such as clearing the cache, enabling help text edit mode, and enabling detailed errors.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.

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.

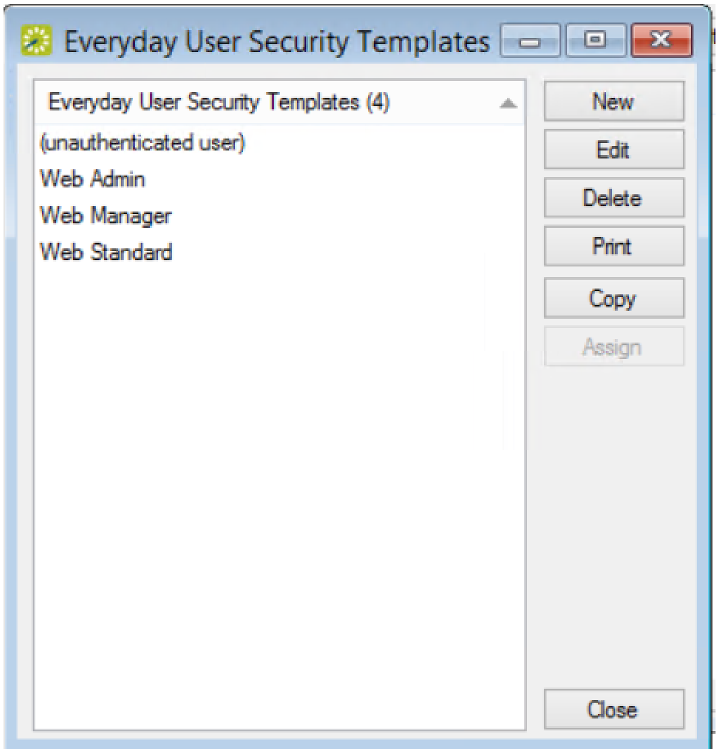
You can also print a security template information in two ways—using the Print button, you can print a list of your templates or a list of user roles showing how they are mapped to security templates.

CHAPTER 13: 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.

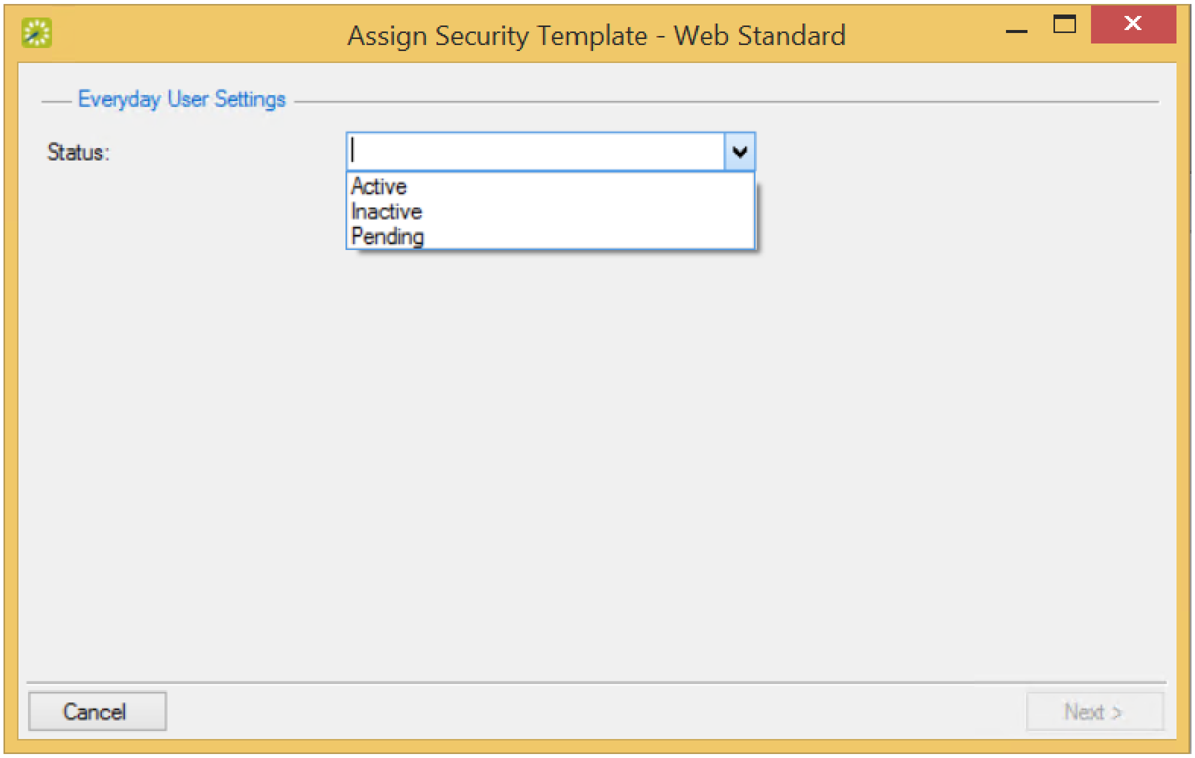
1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Everyday User Security Templates**. The Everyday User Security Templates window opens. The window lists security templates that have been defined for your implementation. The "(unauthenticated user)" template is reserved for guest users.

Everyday User Security Templates Window



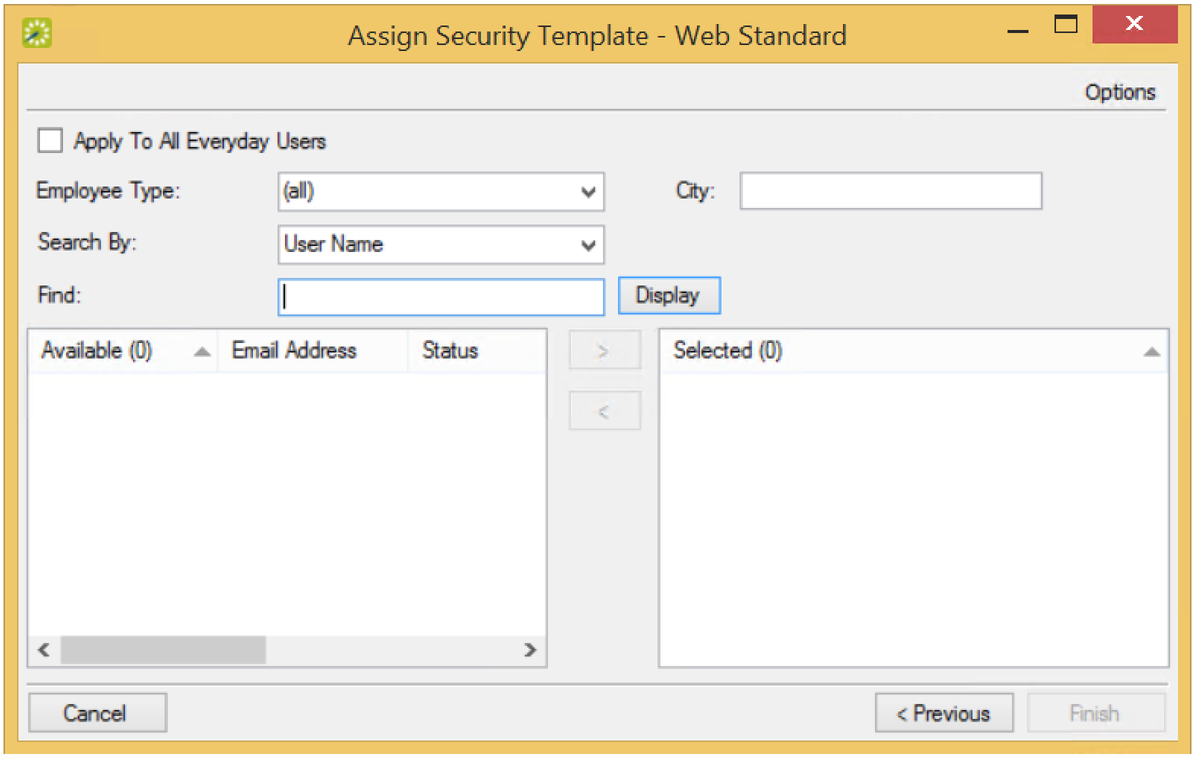
2. Select a security template other than "(unauthenticated user)" to assign to one or multiple users, and then click the **Assign** button. The Assign Security Template window opens, first prompting you to filter everyday users by status.

Assign Security Template Window - 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.

Assign Security Template Window - Everyday Users



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.

CHAPTER 14: 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 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.
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.
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

ROLE	DESCRIPTION
	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 text edit mode, displaying detailed error messages, and configuring optional integration modules.
Expert User	A security role that only pertains to EMS Platform Services. This role is required to access Platform Services API routes for EMS Desktop Client functionality.
View ReservationSummary	This security role allows Administrators to configure unauthenticated access for viewing reservation summary details. For example, if a host forwards a confirmation with a View Reservation Summary link, this security role allows the recipient to view the full details of the reservation when clicking the summary link.

CHAPTER 15: Email 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**.

   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.

CHAPTER 16: Configure Web Menus

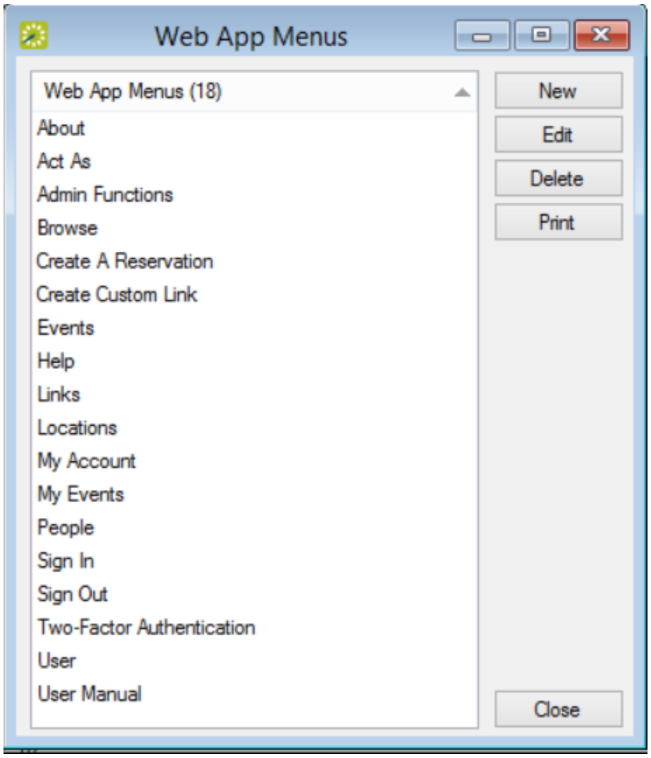
When EMS Web App is first installed, the main menu has a layout that determines the following:

- 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.

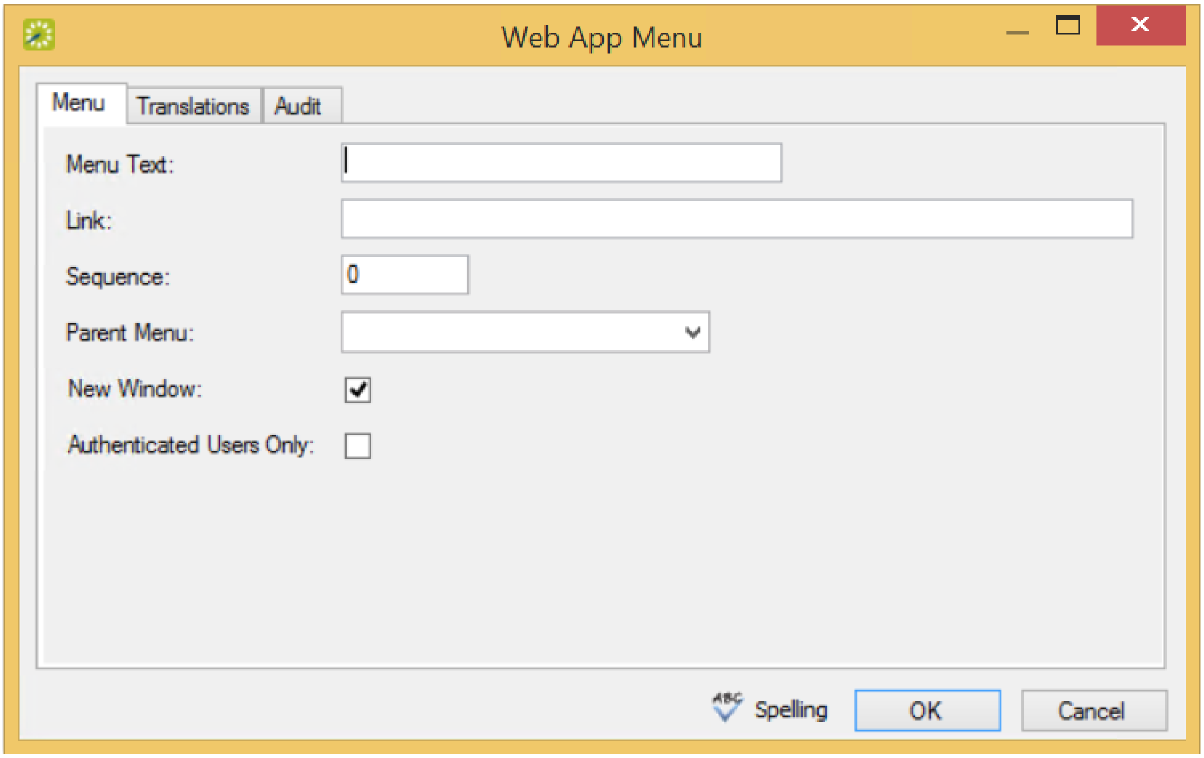
1. On the EMS menu bar, click **Configuration** > **Everyday User Applications** > **Web App Menus**. The Web App Menus window opens. This window lists all the current parent menu items and child options in alphabetical order. Buttons to the right enable you to create new menus, change existing ones, delete, and print.

Web App Menus Window



2. To configure a new menu, click **New**. The Web App Menu dialog box opens. The **Web App Menu** tab is the active tab.

Menu Tab of the Web App Menu Dialog Box



3. Enter the information for the new web menu item.

Menu Tab Field Descriptions

FIELD	DESCRIPTION
Menu Text	The text for the item as it is to appear on the EMS 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 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.

CHAPTER 17: 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 Floor Plans 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.

This topic provides information about the following:

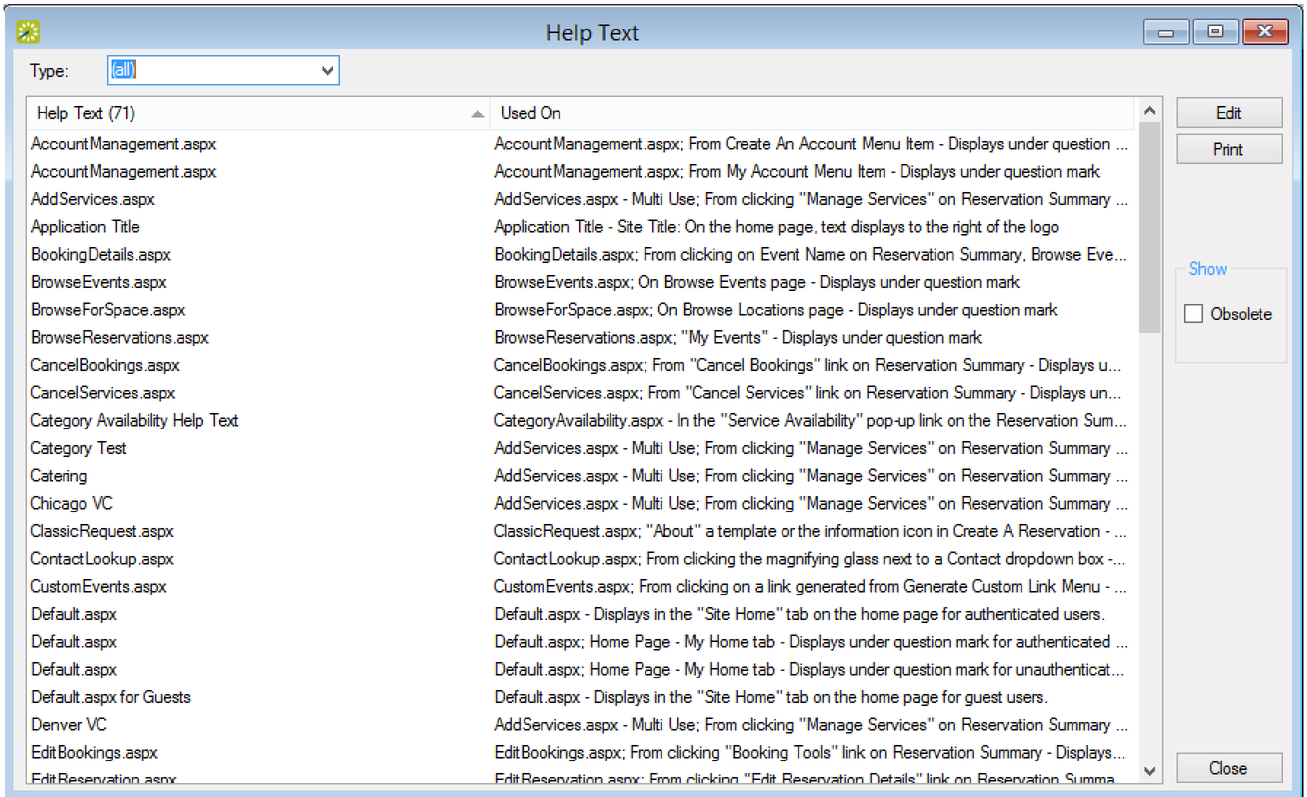
> **TIP:** Depending on your organization, configuration in the EMS Desktop Client may need to be performed by a different type of System Administrator than configuration and text customization in the EMS Web App.

CONFIGURE HELP TEXT IN EMS DESKTOP CLIENT

Follow the instructions below to enable custom help text for EMS Web App and/or EMS Kiosk.

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.

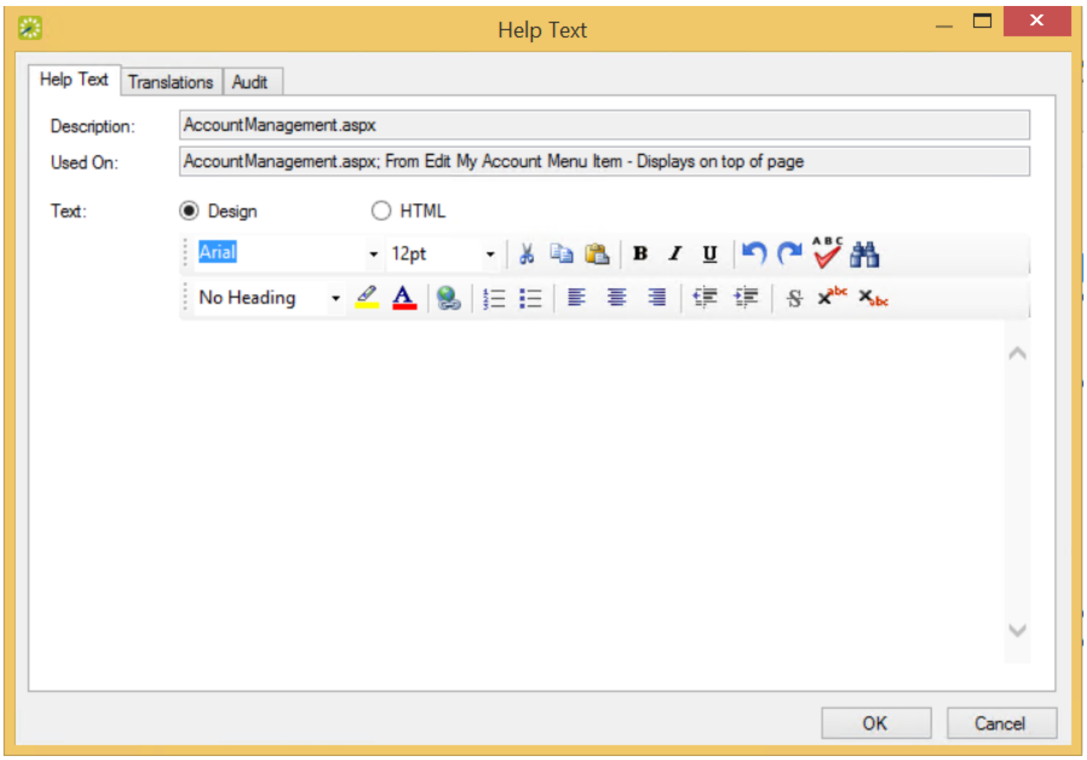
Help Text Window



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.

   Help Text Tab



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.

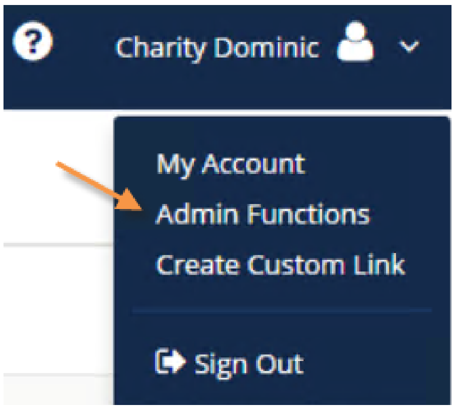
4. If translations have been defined for everyday user templates (see Configure Language Translations), then open the **Translations** tab, and for each translation, click in the **Text** field, and enter the appropriate translation for the Help Text item.
5. Click **OK**. The Help Text dialog box closes. You return to the Help Text window with the newly configured Help Text item automatically selected in the window.

CONFIGURE HELP TEXT IN 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.

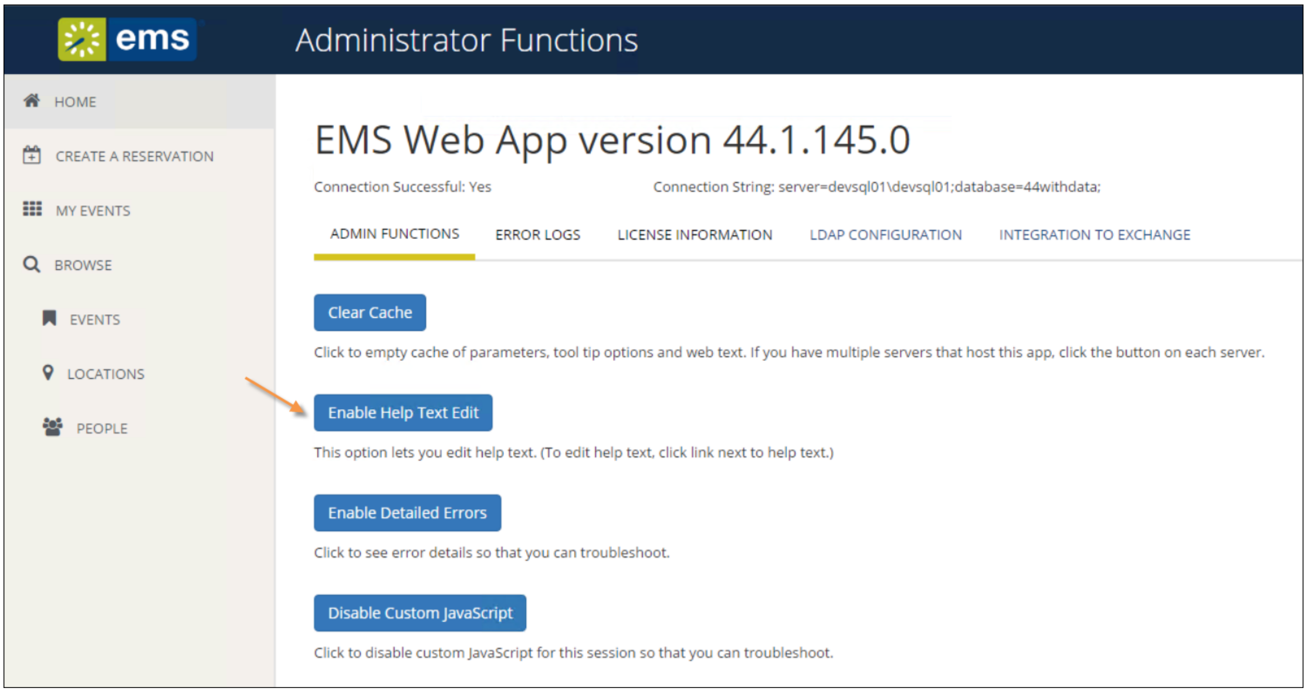
ENABLE THE CUSTOM HELP TEXT FEATURE

1. Log in to EMS Web App.
2. In the dropdown menu next to your name, click **Admin Functions**.



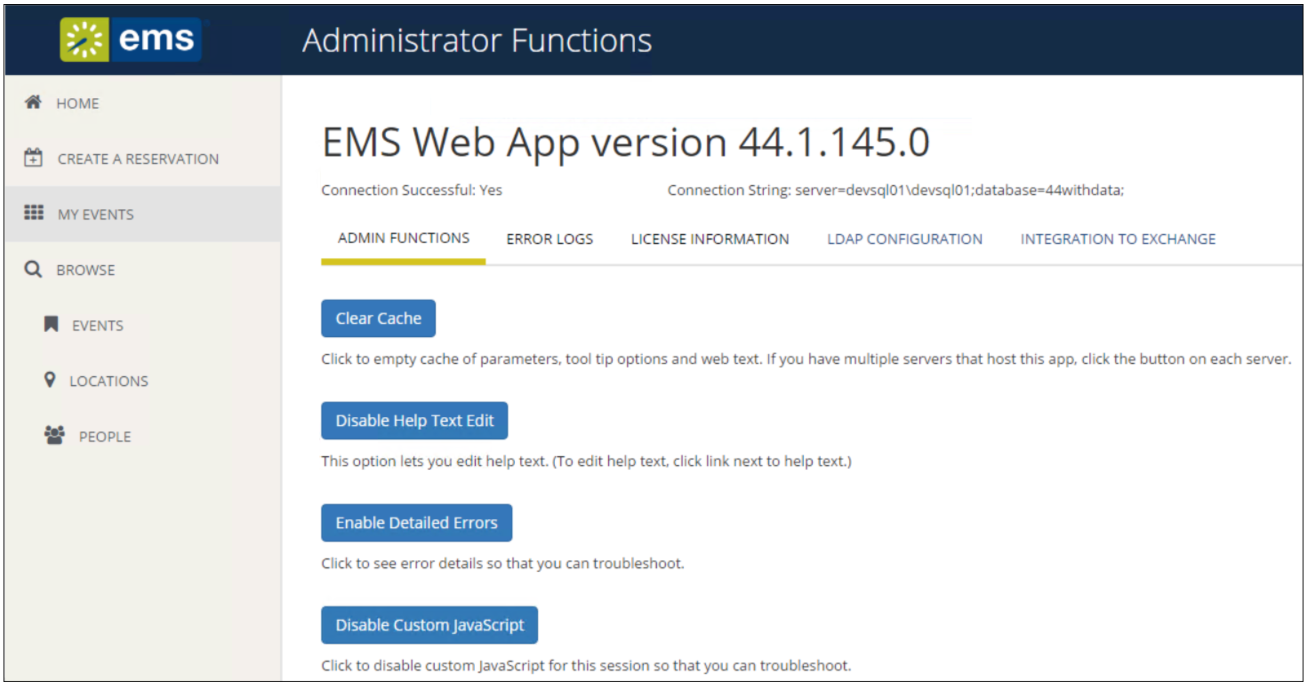
3. The EMS Web App Administrator Function page opens.

Administrator Functions Page with Enable Help Text Edit Button Showing



4. Click **Enable Help Text Edit**. A confirmation message appears indicating that Help Text Mode is now enabled.

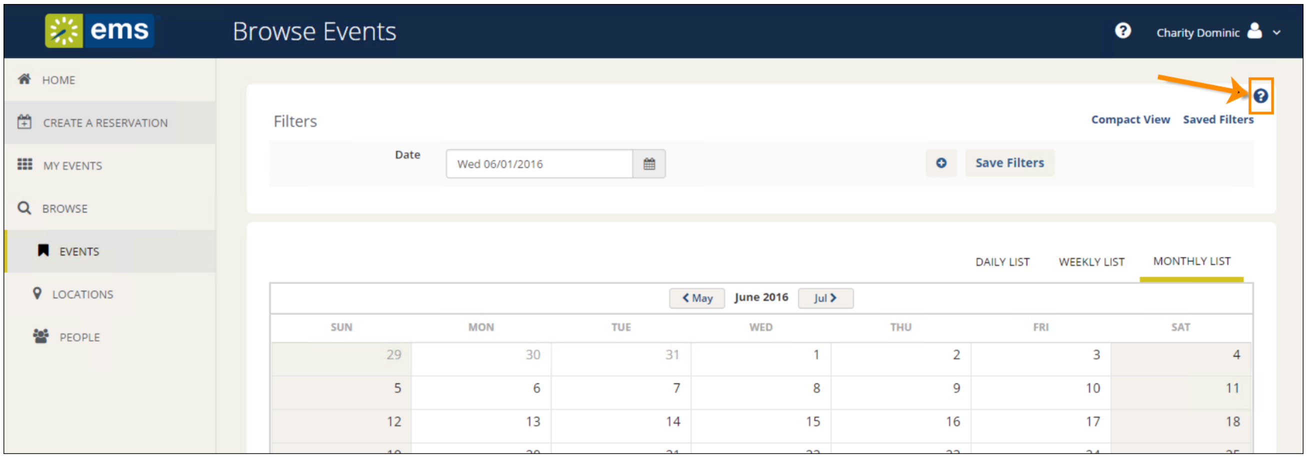
Administrator Functions Page with Disable Help Text Edit Button Showing



NAVIGATE TO PAGES IN EMS WEB APP AND CUSTOMIZE HELP TEXT

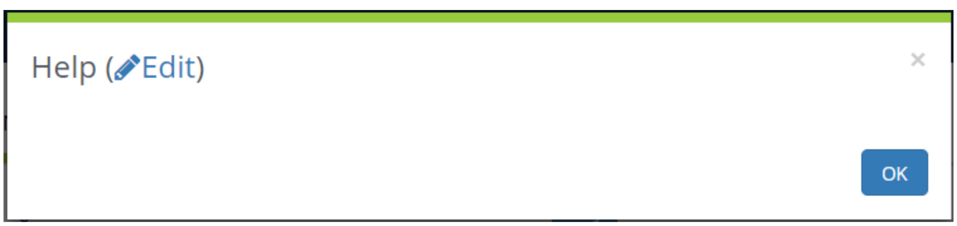
1. Navigate to the EMS Web App page where you wish to customize Help text. The Edit option is available in the upper, right corner of the page.

Edit Option Available in Upper, Right Corner



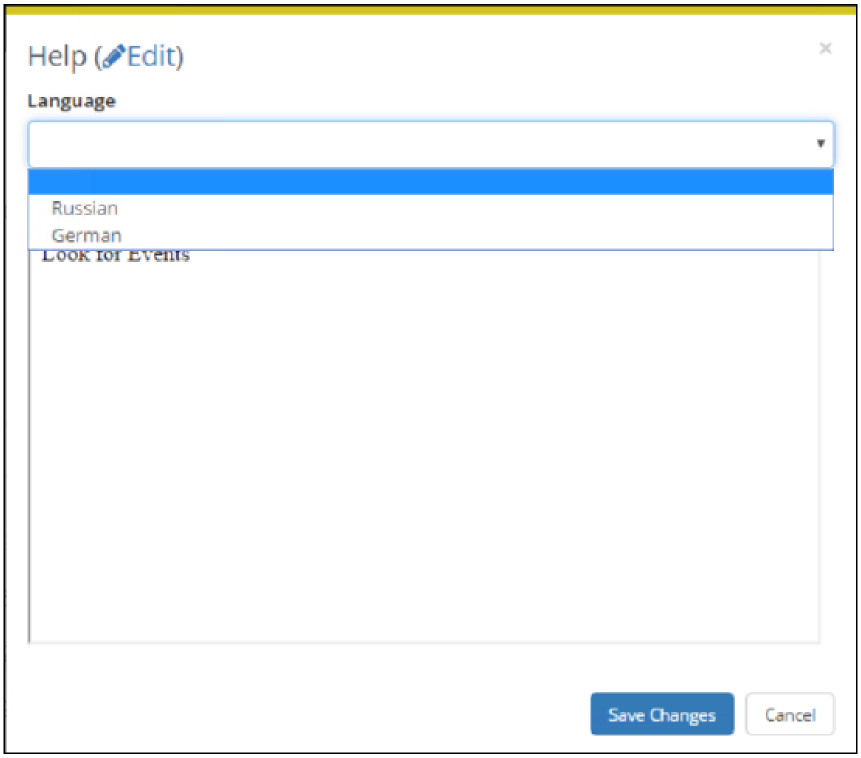
2. Click the option. An edit window launches where you can customize the help text (click **Edit** to enter your custom help text).

Help Text Edit Window



3. If your help text should appear in another language, select a language option in the dropdown field.

Language Field of Help Text Window (After Selecting Edit)



> **TIP:** Options in the Language dropdown are controlled by another Administrator setting, Language Translations.

4. After entering and configuring the Help text, click **Save Changes** to apply the text to the selected page.

CHAPTER 18: Configure Language Translations for Everyday User Applications

> **NOTE:** 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.

Concept: EMS Provides You with the Latest Translation Files.

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.

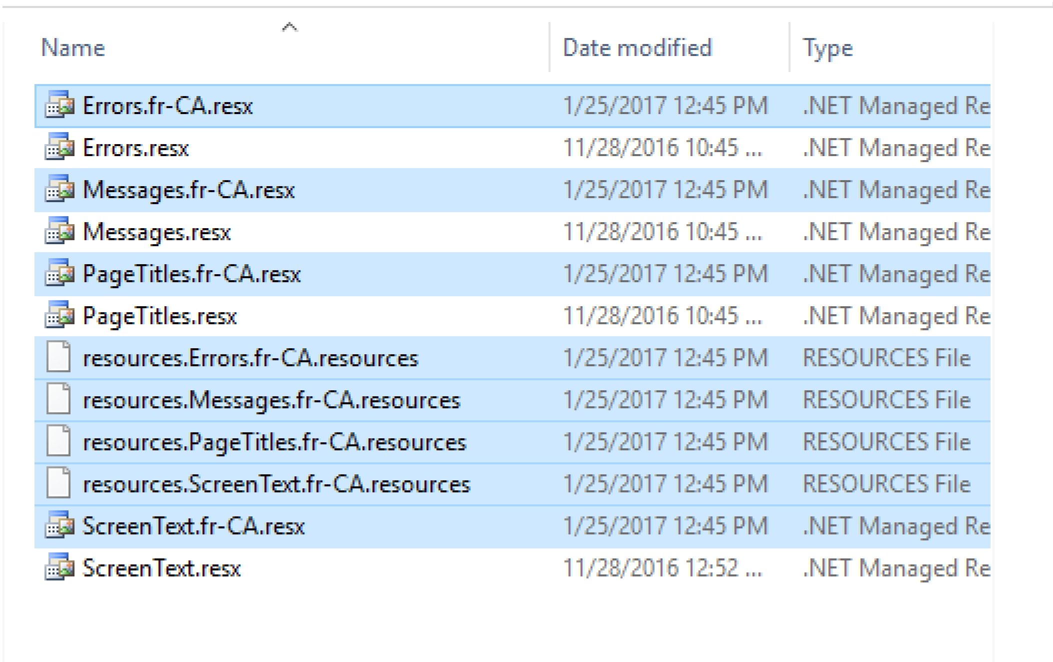
> **NOTE:** Values for data items (e.g. Event Types like “Meeting”, “Training”, etc. or Room Types like “Workspace”, “Conference Room”, etc.) configured within EMS or dynamic information that is inputted by an EMS user or Virtual EMS web user (e.g. Event Name like “HR Meeting”, Comments, Special Instructions, 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\).

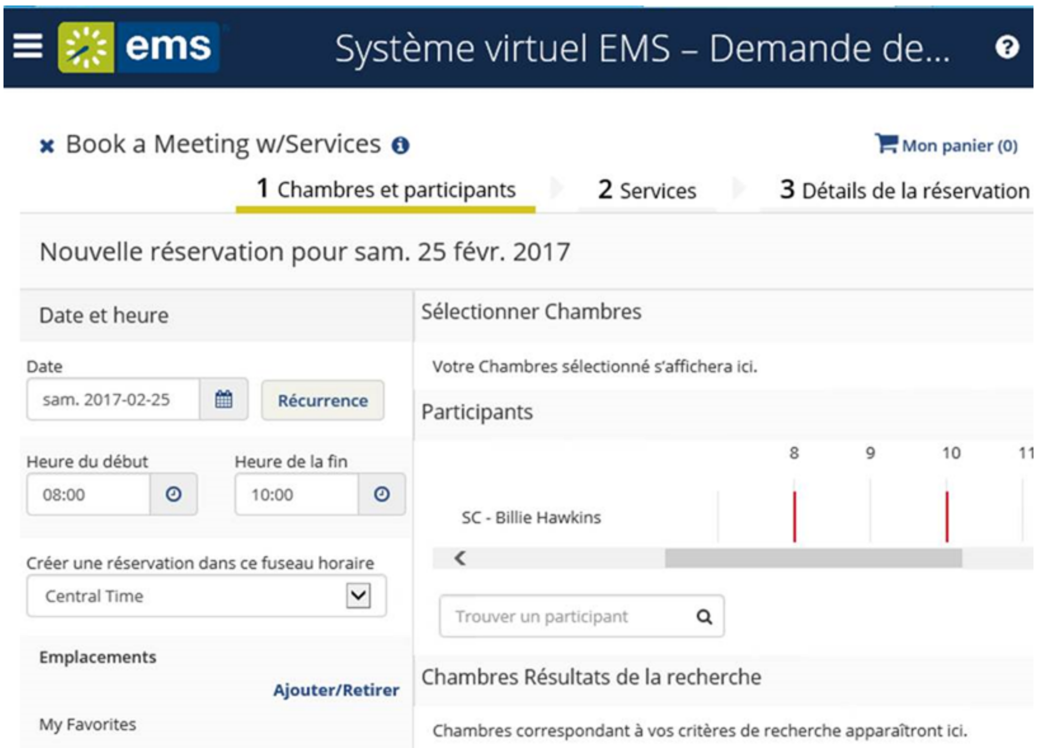
IMPORTANT: For the translation to affect an Everyday Applications user, two conditions should be met:

1. The language setting should be set in Windows.
2. The end user's browser Language Preference is set to that specific language and set as the default.

EXAMPLE SUCCESSFUL INSTALLATION



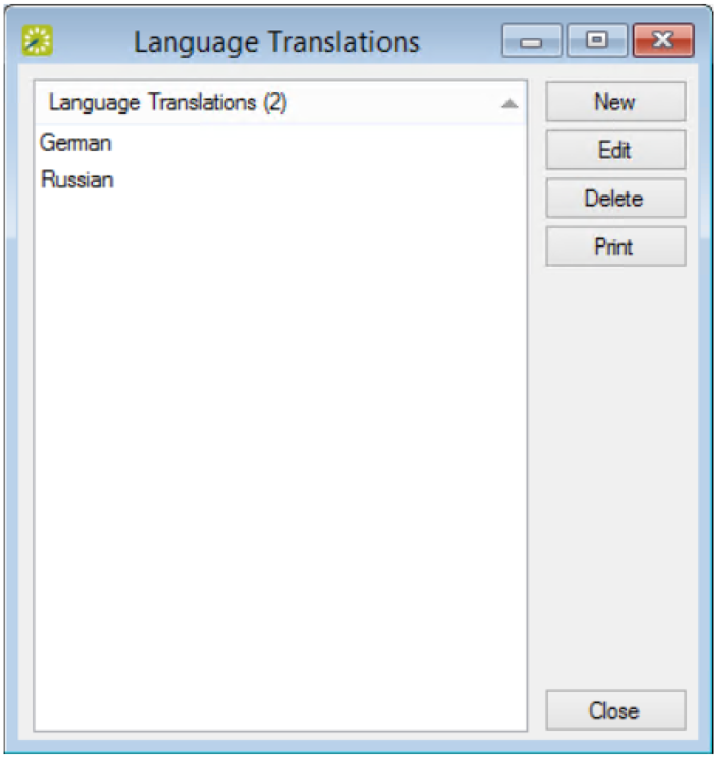
Reflected in EMS as follows (example is French-Canadian).



CONFIGURE YOUR LANGUAGE TRANSLATIONS IN EMS DESKTOP CLIENT

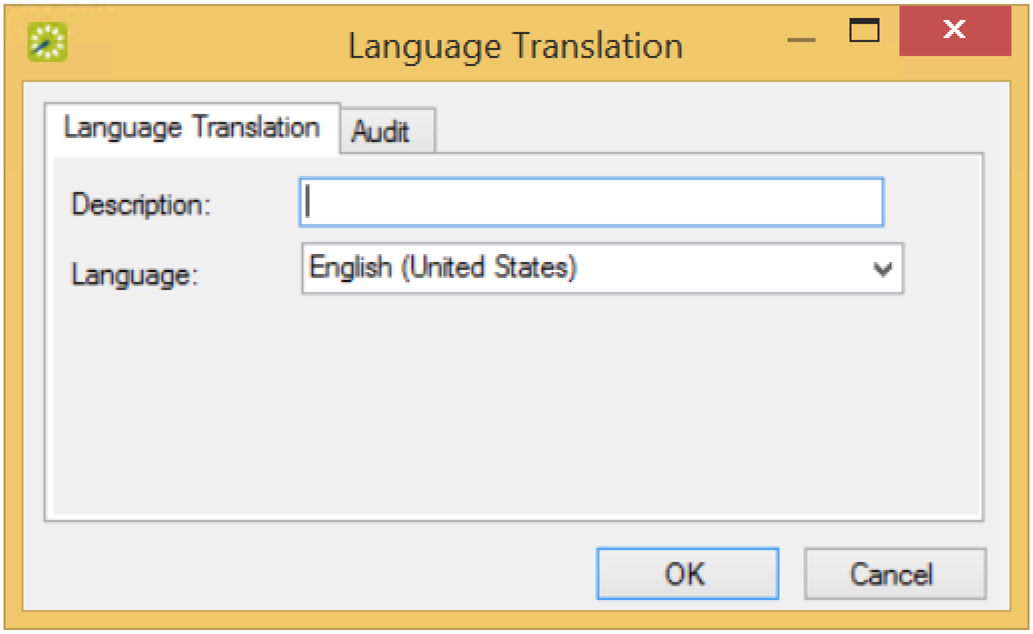
1. On the EMS Desktop Client menu bar, click **Configuration** > **Everyday User Applications** > **Language Translations**. The Language Translations window opens, listing all the translations that are currently configured in your EMS database.

Language Translations Window



2. Click **New**. The Language Translation dialog box opens. By default, the language is set to English (United States).

Language Translation Tab



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.

TIP: After you configure a language translation, it is displayed on the Translations tab in various configuration areas in EMS.

CHAPTER 19: EMS Web App System Parameters

Parameters for the EMS Web App are configured in the EMS Desktop Client. As an EMS Administrator, you can access these parameters by navigating to **System Administration** > **Settings** > **Parameters** > [Everyday User Applications](#) tab.

Parameters for the EMS Web App