Booking Check In and Setup

EMS

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Introduction

This document will give instructions on how to configure booking level check in as well as how to install the new email notification service associated with this functionality.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

Email:	**support@dea.com**
Web:	**www.dea.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Hardware and Software Requirements

A list of the system requirements is maintained on www.dea.com

Obtaining the Latest Release of EMS

The latest release of EMS can be downloaded from the EMS Online Support Center.

1. Go to www.dea.com and enter your Email Address and Password in the Online Support Center area.
2. Click the Software downloads link.
3. Download the EMS Patch, Virtual EMS, EMS Web Client and the EMS Client. Required for both first time installations and upgrades.

Booking Level Check In

Booking level check in is used to help maintain room utilization levels and find accurate reporting on space. Check in at the booking level allows for users to check in to a single booking instead of the entire building for the day. Along with checking-in is the ability to have no show notifications trigger and free up spaces that aren't checked into.

Enabling Check In

1. On the EMS menu bar, click Configuration > Facilities > Rooms.
2. On the Building dropdown list, select one of the following to configure a room — (all) buildings, a specific building, a specific area, or a specific view.
3. Select and edit the room that booking level check in needs to be enabled for.
4. Check the box for Allow Check In. The minutes prior to booking event start is the amount of time before a booking in the specified room will be open for check in.

Note: This option can be added to multiple rooms at the same time using the Wizard on the Rooms screen.

Note: Anyone with access to the desktop client can check in a booking earlier than the alloted time assigned to the room.

No Show Notification Rules

No show notification rules are created for bookings in rooms that require Check in. These rules can be used to notify users of check in times, allow them to check in and cancel bookings if a user does not check in within the appropriate amount of time.

Configuring No Show Notification Rules

1. On the EMS menu bar, click Configuration > Administration > No Show Notification Rules (Bookings)
2. Create a new rule or edit an existing rule.

3. Enter the information for the Now Show Notification Rule.

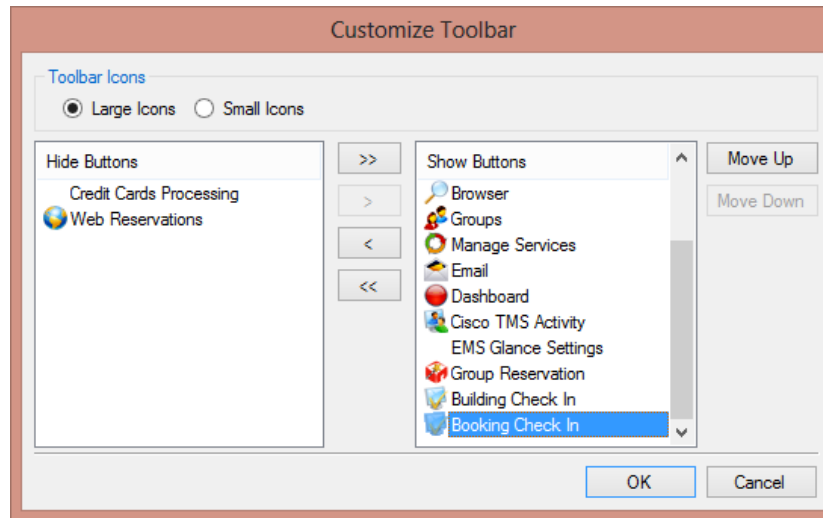| Option	Description
Description	The name or the description for the notification rule. **Note:** The description can be a maximum of 50 characters, including spaces.

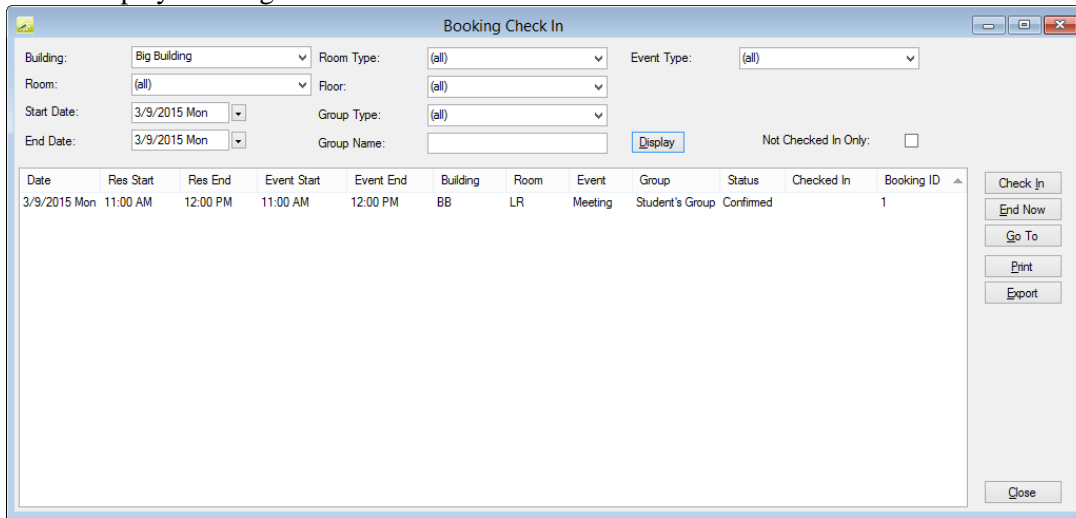| Option	Description
Apply Rule	Selecting when to apply the rule determines when the no show notification rule will be applied and trigger. This can be either before or after the event has started.
Change Status	Select this option if the group's bookings are to be changed to the status selected on the No Show Status dropdown list.
No Show Status	The status to which the group's bookings are changed if the group "no-shows."
Cancel Reason	Available only if the No Show Status is a Cancel Status type. Select a reason for cancelling the "no-show" group.
Send Email	If this box is checked it will send a notification email to the selected party/parties.
Header Message Footer Message	Select a header and/or footer message that is to be displayed on every No Show notification that is sent.
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 Contact Email Web User	Select the appropriate options to indicate to whom the no show notification is to be sent.
Email From	Enter the email address that is to be displayed in the Email From field for the no show notification.
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 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.
Inactive	When this box is checked the no show notification will be made inactive and no longer send notifications for the selected rule.

Managing Check In

When check in is enabled for rooms there are multiple ways to check in to bookings that users can utilize. Included with booking level check in is a new booking check in dashboard. The dashboard is a place to manage bookings and the check in status for them. This dashboard is separate from the EMS Dashboard and the Group Check In Status dashboard that were previously available.

Booking Check In Dashboard

1. On the EMS menu bar, click Reservations > Other> Booking Check In to open the Booking Check In dashboard.
    a. Alternately this can be accessed through the Booking Check In icon on the Toolbar.
    - To add the Booking Check In icon to the Toolbar right click on the toolbar, select customize and move the Booking Check In to the Show Buttons side.

2. This area has multiple options for EMS administrators to help manage booking check in. It also is used to display bookings that have been checked in or not.


| Option	Description
Group Name	Allows the user to search for a group to check in to their booking.
Display	Shows bookings in rooms that are set up for check in and match the filters.
Check In	This will check in a booking for a user that has not checked in using another method.
End Now	This will end a selected booking that is in progress, which will free the room up for another booking.
Go To	This will take the administrator to the navigator for the highlighted booking to view further information.
Print	This will print the information being displayed for the filters that are set above.

Check In Methods

Booking Check In Dashboard

By going into the Booking Check In dashboard and entering the information into the filters, an administrative user can check in a booking by highlighting it and selecting check in.
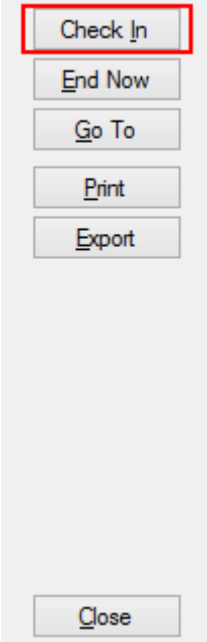
Reservation Book

Bookings in the Reservation Book can be checked in to by right clicking on the booking and selecting Check In.
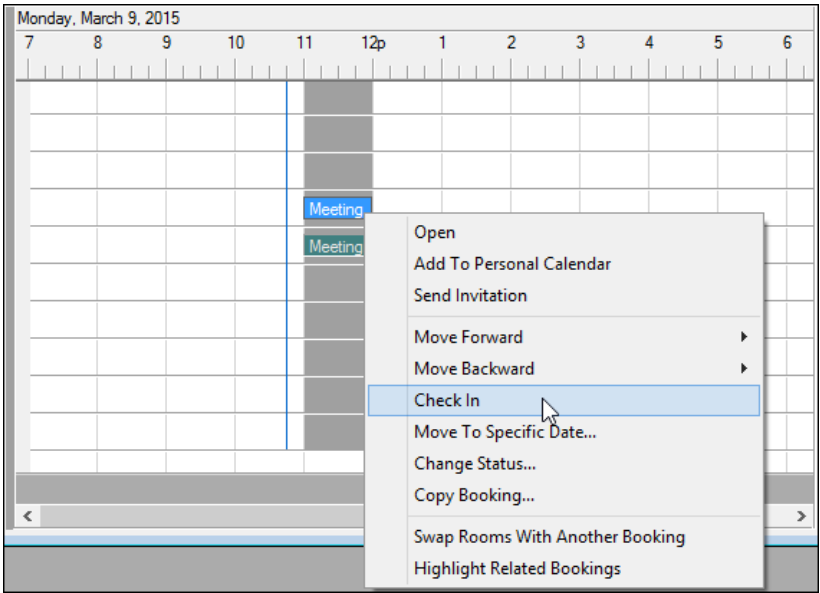
Virtual EMS

To check in through Virtual EMS it requires that the user have a Web Security Template that has the role for Check In/Check Out.

1. To add the role navigate to Configuration > Web > Web Security Templates then edit the template the role is to be added to.
2. Once the Web User has the role they can check into their bookings in the Reservation Summary screen.

EMS Glance

Checking in on EMS Glance can be done at the Glance monitor.

Installing EMS No Show Notification Service

To install the EMS Email Notification Service:
1. Verify that the prerequisite software is installed.
2. Download the **EMSNoShowNotificationSetup.msi** onto the server that will be running the service.
3. Double-click **EMSNoShowNotificationSetup.msi**. Follow the on-screen prompts. It is recommended that the defaults are accepted.
4. Within the Microsoft Windows Start menu, locate **EMS No Show Notification service**. The EMS No Show Notification Configuration screen will appear.

5. Review and complete/change the following settings:
   - **Mode** – Type of authentication to the SMTP server.
   - **SMTP Server** – SMTP server name or IP address.
   - **Use Gmail** – Check this box if the organization uses Gmail as their mail server.
   - **Port Number** – SMTP port (default = 25)
   - **Use SSL** – Check this option if your SMTP server runs under SSL.
   - **User Name/Password** – Required if an authentication mode other than Unauthenticated is selected.

- **Email Interval** – The frequency with which the system will generate notification emails. If the interval is set to 0 minutes, the service will not function.

6. In the Databases section of the dialog box, you will see a sample database and server (named 'server' and 'database.') Select this entry, click **Edit**, and change the values to your EMS server and database name.

On the Database tab of the Notification Database dialog box, complete the following:

- **Server/Database** – EMS server and database name
- **EMS Authentication/Windows Authentication** – The method of authentication to this database.
- **Email From** – Email address that will be displayed in the From field of notification emails that are sent.
- **Enable Service Event Logging** – Activates Windows event logging.

8. After making your entries, click **OK**.
9. Click **OK** again to save your EMS Email Notification Configuration settings.

Note: If any issues are encountered starting the service, please visit the EMS Knowledge Base in the online Support Center for a possible solution or call Customer Support.