EMS for Outlook®

User’s Manual

Event Management Systems
Schedule Clarity

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Preface

Welcome to the *EMS for Outlook User's Manual*. The purpose of the *EMS for Outlook User's Manual* is to answer your questions and guide you through the procedures necessary to use the EMS for Outlook plugin module efficiently and effectively.

Using the manual

You will find the *EMS for Outlook User's Manual* easy to use. You can simply look up the topic that you need in the table of contents. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *EMS for Outlook User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.

Conventions used in the manual

The *EMS for Outlook User's Manual* uses the following conventions:

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Location>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.

- Page numbering is "online friendly." Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the manual.

Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.

- This manual is intended for both print and online viewing.
  - If information appears in blue, it is a hyperlink. Table of Contents entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS for Outlook User's Manual* assumes that you are familiar with the Microsoft Outlook application and its basic functions and navigational elements.

Organization of the manual

In addition to this Preface, the *EMS for Outlook User's Manual* contains the following chapters and appendices:

- Chapter 1, "EMS for Outlook Overview," on page 9 provides an overview of the purpose and functions for the EMS for Outlook plugin module. It also compares and contrasts the EMS for Outlook plugin module, the Virtual EMS application, and Microsoft Outlook so that you aware of the similarities and differences between the different applications and when it is appropriate to use one application instead of another.
- Chapter 2, "EMS for Outlook Operations," on page 17 details the options for creating a single reservation or a series reservation using the EMS for Outlook plugin module. It also details how to edit a reservation after it has been created.
- Appendix A, "EMS for Outlook Plugin Module Alerts and Error Messages," on page 41 details the known alerts and error messages for the EMS for Outlook plugin module and provides an explanation for each.

Chapter 1

EMS for Outlook Overview

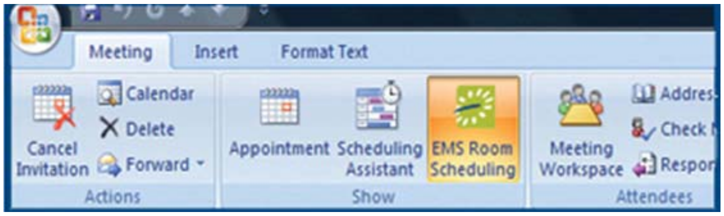
The EMS for Outlook plugin module provides one-click access to self-service room reservation and resource booking from within the familiar Outlook personal scheduling interface. Users can find available rooms, reserve them and book resources - such as A/V equipment or catering - all from within Microsoft Outlook.

This chapter covers the following topics:

- "Microsoft Outlook, EMS for Outlook, and VEMS Comparison" on page 10.
- "Microsoft Outlook and Exchange Imposed Limitations for the EMS for Outlook Plugin Module" on page 12.

Microsoft Outlook, EMS for Outlook, and VEMS Comparison

Figure 1-1: EMS for Outlook Plugin Module (displayed in Microsoft Outlook)



The EMS for Outlook plugin module provides one-click access to self-service room reservation and resource booking using the familiar Outlook personal scheduling interface. Users can find available rooms, reserve them and book resources - such as A/V equipment or catering - all from within Microsoft Outlook.

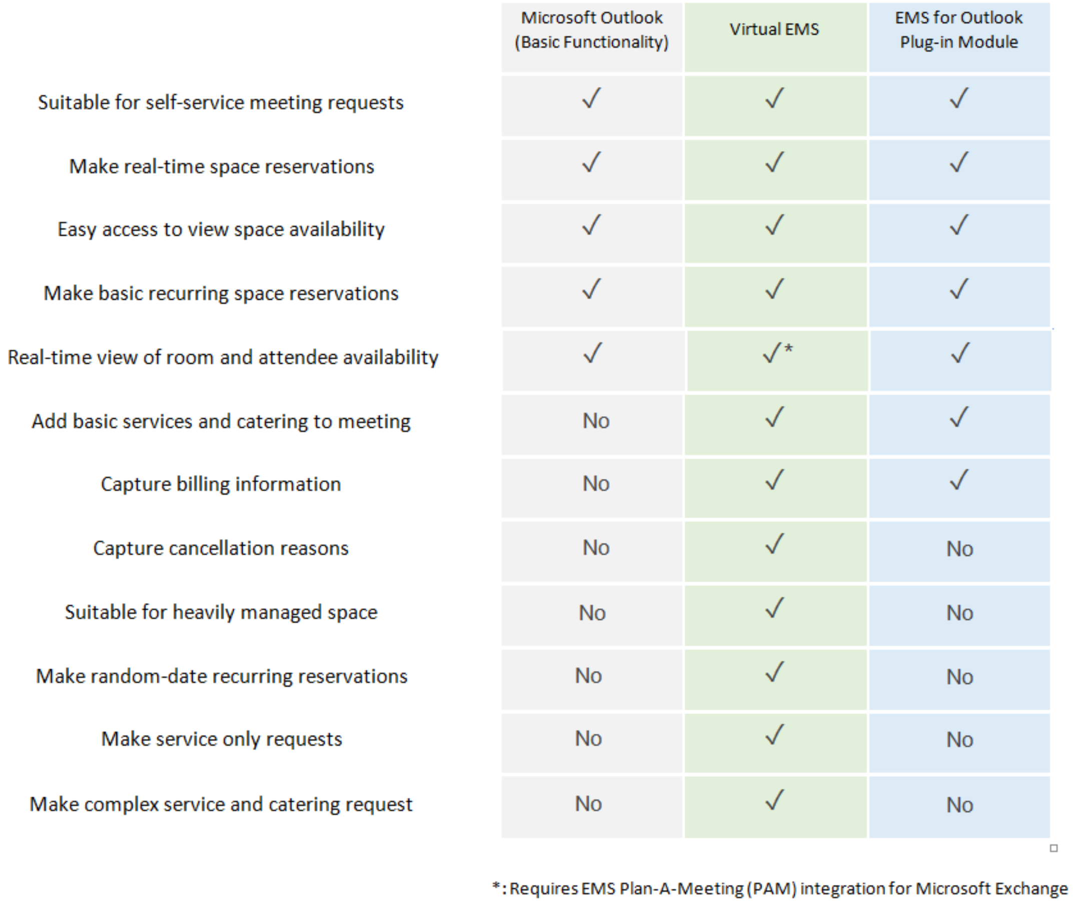
Virtual EMS(VEMS) provides robust, real-time access to scheduling information via an internet browser. A broad range of scheduling options and scheduling scenarios are supported easily. Authorized users can, depending on the level of access granted, submit room requests or create self-service reservations directly. Users can create basic or advanced reservations, schedule resources, view building schedules, or search for specific events.

Some important points to note about the EMS for Outlook plugin module as compared to Microsoft Outlook and VEMS are the following:

- The module is designed for the basic scheduling of rooms and resources that require no official approval (“unmanaged” space).
- The module is not designed to be an administrative tool. For complex room reservations and resource management, Virtual EMS (VEMS) or the EMS Desktop client application is required.
- Simple routine reservations made using the EMS for Outlook plugin module generally follow the same rules as simple Outlook reservations.
- The module supports existing Outlook delegation rules and assignments.
- The module can be used just like Microsoft Outlook to schedule regular recurring appointments (day and time).
- Just like VEMS reservations, EMS for Outlook reservations abide by the rules of the Web Process template and the VEMS settings of the applicable categories and resources. The ability to modify and cancel EMS for Outlook reservations (dates, time, rooms, services and/or resources) are determined by these rules *and* the restrictions of Microsoft Outlook and Exchange.

Figure 1-2 on page 11 summarizes these comparisons.

Figure 1-2: Microsoft Outlook, VEMS, and EMS for Outlook plugin module comparison



	Microsoft Outlook (Basic Functionality)	Virtual EMS	EMS for Outlook Plug-in Module
Suitable for self-service meeting requests	✓	✓	✓
Make real-time space reservations	✓	✓	✓
Easy access to view space availability	✓	✓	✓
Make basic recurring space reservations	✓	✓	✓
Real-time view of room and attendee availability	✓	✓*	✓
Add basic services and catering to meeting	No	✓	✓
Capture billing information	No	✓	✓
Capture cancellation reasons	No	✓	No
Suitable for heavily managed space	No	✓	No
Make random-date recurring reservations	No	✓	No
Make service only requests	No	✓	No
Make complex service and catering request	No	✓	No

*: Requires EMS Plan-A-Meeting (PAM) integration for Microsoft Exchange

Microsoft Outlook and Exchange Imposed Limitations for the EMS for Outlook Plugin Module

Rules regarding integration Microsoft Exchange and Outlook limit the functionality of the EMS for Outlook plugin module as described below:

Attachment Limitation

When using the EMS for Outlook plugin module to make a reservation or appointment, you can use Microsoft Outlook's native attachment function. The attachment, however, is *not* added to the EMS database. It resides only in Exchange.

Attendance Count Limitation

If you use the EMS for Outlook plugin module to make a reservation for a distribution list, the entire list is counted as a single attendee.

Changing a Booking as a Delegate Limitation

If you make a reservation in the EMS for Outlook plugin module and invite an attendee for whom you have delegation rights, and then attempt to modify the booking from your view of their calendar, the following message is displayed: "**Your web user id does not match the web user id on the reservation. Any changes to this meeting will disconnect the meeting from the EMS Reservation**." You must always modify a booking that you make from your own calendar.

EMS Cancel Reason Function Limitation

The native Cancel Reason function that is available in the EMS Desktop client and VEMS is not available for reservations that have been made with the EMS for Outlook plugin module.

Floor Plans and Meeting Room Images Limitation

When you make a reservation or appointment with the EMS for Outlook plugin module, the interactive EMS floor plan function (searching for open rooms in an interactive floor plan) is not available. You can, however, attach floor plan images to a room. The images are available for viewing as standard, static images.

Meeting Update Notification Limitation

The EMS for Outlook plugin module cannot circumvent the standard Microsoft Outlook behavior of notifying all attendees when any change is made to critical meeting information (location, date, and/or time). If you make any change to the critical information for a meeting, even for a single location or booking, through the plugin, then Microsoft Exchange generates and sends an update email to all the meeting invitees.

Offline Scheduling Limitation

A direct network connection to the Plan-A-Meeting web service is required to schedule appointments using the EMS for Outlook plugin module.

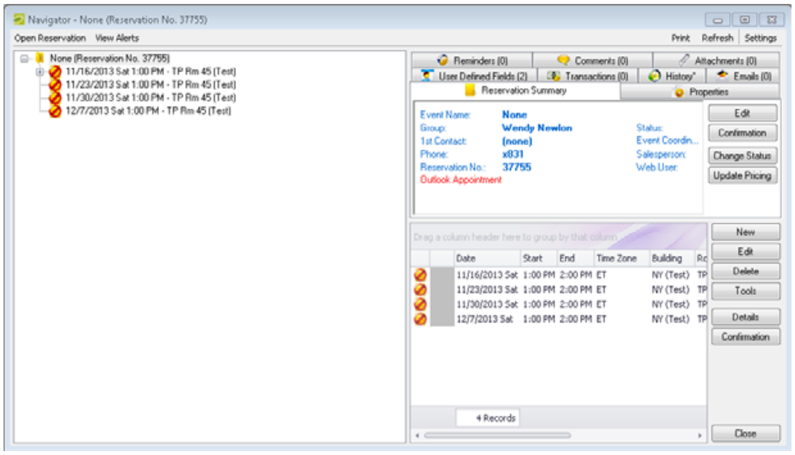
Outlook Web Application (OWA) Limitation

The EMS for Outlook plugin module works only with the Microsoft Outlook desktop application. It does not work with the Microsoft Outlook web application.

Recurring Meeting Limitation - Extending the Meeting without Selecting a Room

If you change the recurrence pattern of a meeting using the EMS for Outlook Plugin module, the location is removed from the meeting. You must select a location again before saving the meeting. The reservation, however, is still displayed on your calendar and all invitees' calendars in Microsoft Outlook.

Figure 1-3: Bookings cancelled in EMS if meeting recurrence pattern is changed



Navigator - None (Reservation No. 37755)

None (Reservation No. 37755)
11/16/2013 Sat 1:00 PM - TP Rm 45 (Test)
11/23/2013 Sat 1:00 PM - TP Rm 45 (Test)
11/30/2013 Sat 1:00 PM - TP Rm 45 (Test)
12/7/2013 Sat 1:00 PM - TP Rm 45 (Test)

Event Name: None
Group: Wendy Newlon
1st Contact: (none)
Phone: x831
Reservation No.: 37755
Outlook Appointment
Status:
Event Coordin...
Salesperson:
Web User:

Drag a column header here to group by that column

Date	Start	End	Time Zone	Building	Rc
11/16/2013 Sat	1:00 PM	2:00 PM	ET	NY (Test)	TP
11/23/2013 Sat	1:00 PM	2:00 PM	ET	NY (Test)	TP
11/30/2013 Sat	1:00 PM	2:00 PM	ET	NY (Test)	TP
12/7/2013 Sat	1:00 PM	2:00 PM	ET	NY (Test)	TP

4 Records

Open Reservation
View Alerts
Print
Refresh
Settings
Reminders (0)
Comments (0)
Attachments (0)
User Defined Fields (2)
Transactions (0)
History*
Emails (0)
Reservation Summary
Properties
Edit
Confirmation
Change Status
Update Pricing
New
Edit
Delete
Tools
Details
Confirmation
Close

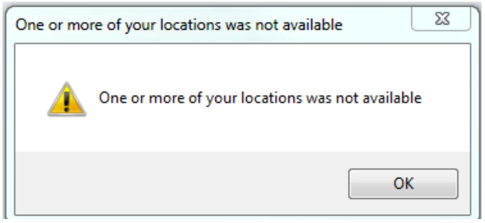
Recurring Meeting Limitation - Random Meetings

The module can be used just like Microsoft Outlook to schedule regular recurring appointments (day and time); however, if a reservation requires random recurring dates and times, these appointments must be scheduled individually in the plugin. None of these random appointments belongs to the same reservation. Each appointment gets its own unique reservation ID.

Recurring Meeting Limitation - Unavailable Room

When you are making reservation using the EMS for Outlook plugin module, the module books the entire series of dates even if the selected room is not available for all the meeting dates. A warning message is displayed in Outlook, and EMS automatically sends you a message that details the dates that the room is not available. (See Figure 1-5 on page 14.) EMS also places the bookings into a Conflict status for the dates that the room is not available. (See Figure 1-6 on page 14.)

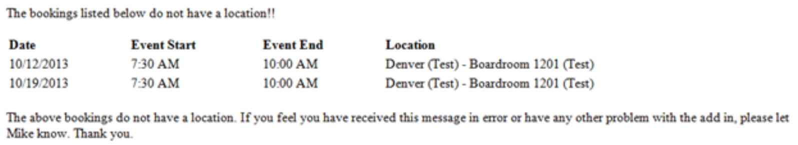
Figure 1-4: Warning message if the selected room is unavailable



One or more of your locations was not available

One or more of your locations was not available

Figure 1-5: Automatic unavailable message



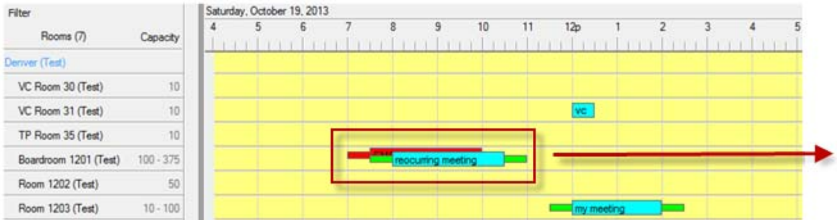
The bookings listed below do not have a location!!

Date	Event Start	Event End	Location
10/12/2013	7:30 AM	10:00 AM	Denver (Test) - Boardroom 1201 (Test)
10/19/2013	7:30 AM	10:00 AM	Denver (Test) - Boardroom 1201 (Test)

The above bookings do not have a location. If you feel you have received this message in error or have any other problem with the add in, please let Mike know. Thank you.

The customer configures the header and footer for this automatic unavailable message.

Figure 1-6: Room placed into Conflict status in EMS Desktop client on the unavailable dates


Filter
Saturday, October 19, 2013
4
5
6
7
8
9
10
11
12p
1
2
3
4
5
vc
reocurring meeting
my meeting

Rooms (7)	Capacity
Denver (Test)	
VC Room 30 (Test)	10
VC Room 31 (Test)	10
TP Room 35 (Test)	10
Boardroom 1201 (Test)	100 - 375
Room 1202 (Test)	50
Room 1203 (Test)	10 - 100

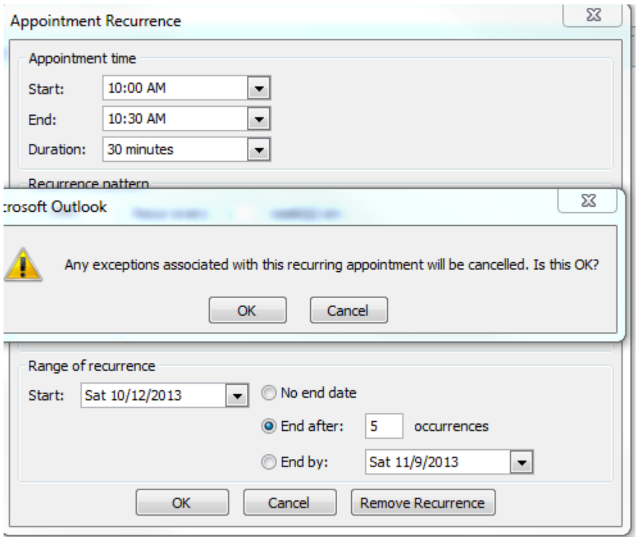
Room placed in Conflict status in EMS desktop client for the unavailable dates.

Recurring Meeting Limitation - Unique Booking Changes

If you make any change to one or more, but not all bookings, for a recurring meeting in the module (for example, you change the date and/or time pattern), and then extend the meeting, the following occurs:

- The original recurrence meeting is cancelled in its entirety in EMS.
- The recurrence meeting is built again with all the original bookings and the extended bookings in EMS.
- All the “exceptions” (locations and services) that were associated with the original bookings that you changed are canceled.

Figure 1-7: Exception cancellation message


Appointment Recurrence
Appointment time
Recurrence pattern
Range of recurrence
OK
Cancel
Remove Recurrence

Start: 10:00 AM
End: 10:30 AM
Duration: 30 minutes

rosoft Outlook [redacted]

Any exceptions associated with this recurring appointment will be cancelled. Is this OK?

OK Cancel

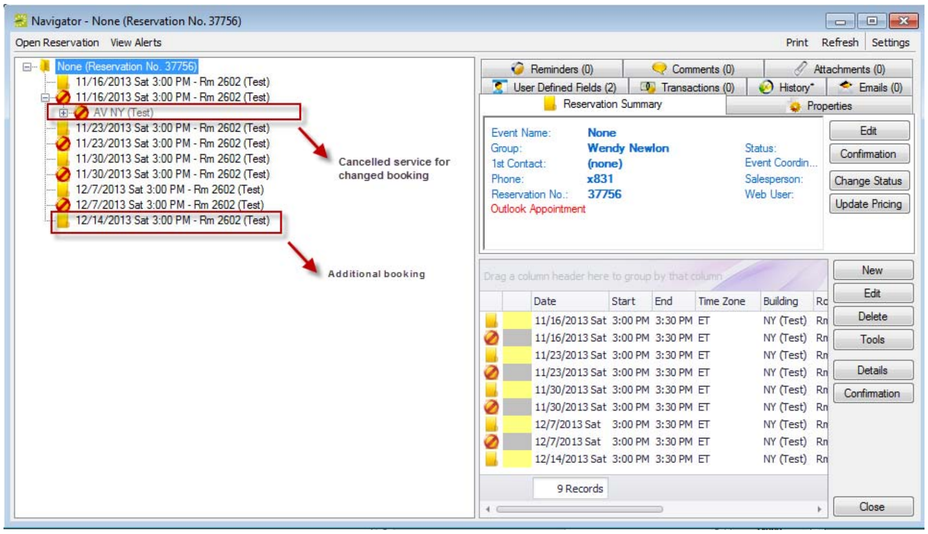
Start: Sat 10/12/2013
○ No end date
● End after: 5 occurrences
○ End by: Sat 11/9/2013

The following scenarios are examples that result in the cancellation of exceptions for a reservation made using the EMS for Outlook plugin module:

- Adding a service to one or more, but not all, the bookings.
- Changing the time for one or more, but not all, the bookings.
- An EMS Desktop client user adds a service to one or more, but not all, the bookings.
- An EMS Desktop client users adds another booking to the recurrence.

This additional booking is not tied to Exchange and it is not displayed on the user's calendar.

Figure 1-8: Unique booking changes and results in EMS


Navigator - None (Reservation No. 37756)
Open Reservation
View Alerts
Print
Refresh
Settings
Reminders (0)
Comments (0)
Attachments (0)
User Defined Fields (2)
Transactions (0)
History*
Emails (0)
Reservation Summary
Properties
Edit
Confirmation
Change Status
Update Pricing
Drag a column header here to group by that column
New
Edit
Delete
Tools
Details
Confirmation
Close

None (Reservation No. 37756)
11/16/2013 Sat 3:00 PM - Rm 2602 (Test)
11/16/2013 Sat 3:00 PM - Rm 2602 (Test)
AV NY (Test)
11/23/2013 Sat 3:00 PM - Rm 2602 (Test)
11/23/2013 Sat 3:00 PM - Rm 2602 (Test)
11/30/2013 Sat 3:00 PM - Rm 2602 (Test)
11/30/2013 Sat 3:00 PM - Rm 2602 (Test)
12/7/2013 Sat 3:00 PM - Rm 2602 (Test)
12/7/2013 Sat 3:00 PM - Rm 2602 (Test)
12/14/2013 Sat 3:00 PM - Rm 2602 (Test)

Cancelled service for changed booking

Additional booking

Event Name: None
Group: Wendy Newlon
1st Contact: (none)
Phone: x831
Reservation No.: 37756
Outlook Appointment
Status:
Event Coordin...
Salesperson:
Web User:

		Date	Start	End	Time Zone	Building	Rc
		11/16/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
⊘		11/16/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
		11/23/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
⊘		11/23/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
		11/30/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
⊘		11/30/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
		12/7/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
⊘		12/7/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn
		12/14/2013 Sat	3:00 PM	3:30 PM	ET	NY (Test)	Rn

9 Records

Room Filtering Limitation

When you are creating a reservation, it is often helpful to filter the list of available rooms. You can filter by capacity, room type, floor, and selected features in the EMS for Outlook plugin module.

The EMS for Outlook plugin module "remembers" the filters that you specify. Unless you modify the values, all subsequent room searches are carried out according to the filter values that you last specified.

Setup Type Limitation

In the EMS for Outlook plugin module, you cannot select a setup type for a scheduled room, for example, a banquet or a class room setup, which is unlike reservations made in VEMS or the EMS Desktop client application.

Translation Support Limitation

The only data that can be translated for the EMS for Outlook plugin module is the *configurable* data related to EMS such as the names of food items, room, buildings, categories, and so on. Full translation is available only with VEMS.

Visitor Management Limitation

Attendee category types (for example, Visitors) are not available in the EMS for Outlook plugin module. After you make a reservation and invite attendees using the EMS for Outlook plugin module, you must access the meeting in VEMS or the EMS Desktop client to add the attendee category type of Visitors. After you have added the attendee category type of Visitors in VEMS or the EMS desktop client, then the visitors are displayed on the Visitors Dashboard in the EMS Desktop client.

Chapter 2

EMS for Outlook Operations

You can use the functions in the EMS for Outlook plugin module to check for available space for an event and to make a reservation for the event that is saved in your EMS database. You can search for rooms that are available for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings).

This chapter covers the following topics:

- “Creating a Single Reservation” on page 19.
- “Creating a Series Reservation” on page 28.
- “Creating a Video Conference Reservation” on page 37.
- “Editing or Canceling a Scheduled Event” on page 39.

Creating a Single Reservation

You can search for rooms that are available for a particular time on one day and create a simple reservation with one booking.

This section details the creation of a single reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see "Creating a Video Conference Reservation" on page 37.

To create a single reservation

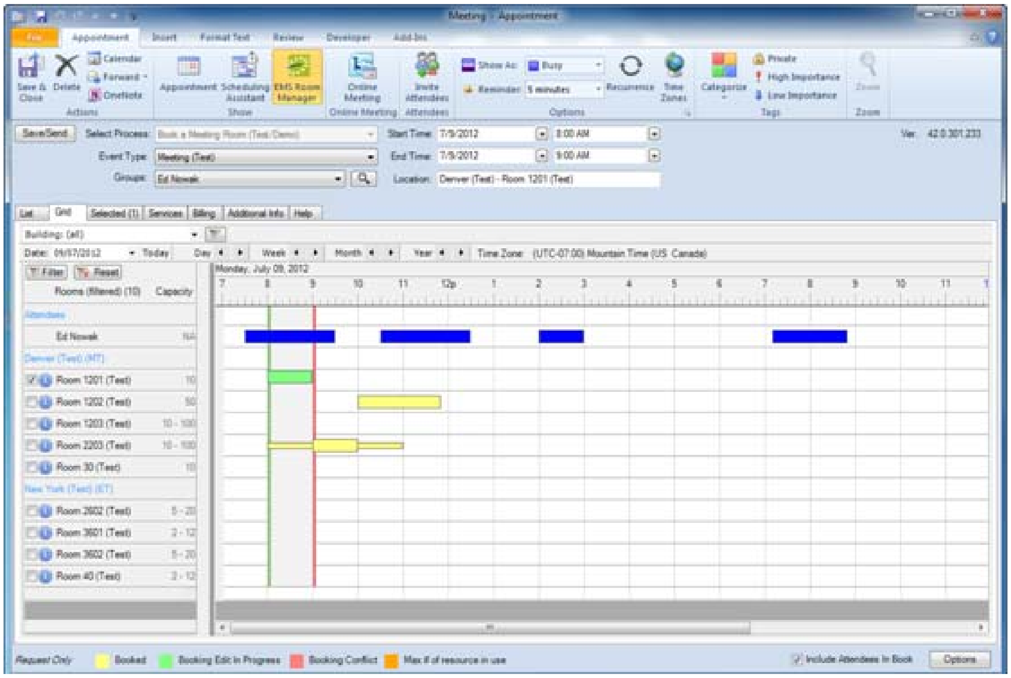
1. Open Microsoft Outlook and create a standard event that includes the event subject, the date and time for the event, and invite the necessary attendees.

2. Click EMS Room Scheduling .

   By default, the EMS for Outlook plugin module opens in the Grid view for a single meeting date. The Grid view shows the attendees' free/busy schedules for the scheduled event date. Rooms that can be booked for the event are displayed below the attendee list as well as their minimum and/or maximum capacities.

The EMS for Outlook plugin module "remembers" the building/area/view that you last selected.

Figure 2-1: EMS plugin module, Grid view


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As:
Busy
Reminder:
5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Today
Day
Week
Month
Year
Filter
Reset
Options

Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver: 42.0.301.233

Building: (all)
Date: 09/07/2012
Time Zone: (UTC-07:00) Mountain Time (US Canada)
Monday, July 09, 2012

Rooms (filtered) (10)	Capacity
Attendees	
Ed Nowak	NA
Denver (Test) (MT)	
☑ Room 1201 (Test)	10
☐ Room 1202 (Test)	50
☐ Room 1203 (Test)	10 - 100
☐ Room 2203 (Test)	10 - 100
☐ Room 30 (Test)	10
New York (Test) (ET)	
☐ Room 2602 (Test)	5 - 20
☐ Room 3601 (Test)	2 - 12
☐ Room 3602 (Test)	5 - 20
☐ Room 40 (Test)	2 - 12

Request Only 🟨 Booked 🟩 Booking Edit In Progress 🟥 Booking Conflict 🟧 Max # of resource in use

☑ Include Attendees In Book

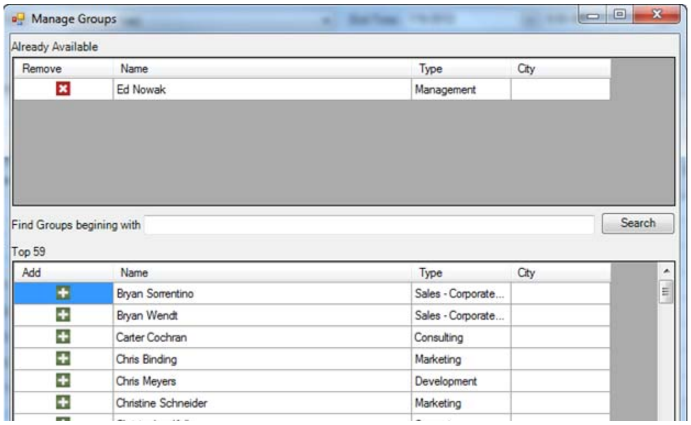
3. On the Select Process dropdown list, select the type of reservation that you are making.
4. On the Event Type list, select the event type for the event.

The Start Time and the End Time are pulled from the initial event information that you specified when creating the event in Outlook. You can edit these values. See “Editing or Canceling a Scheduled Event” on page 39.

5. If applicable, click the Search icon 🔍 next to the Groups field to open the Manage Groups window and search for the group for which you are making the reservation.

You might be able to make a reservation only for yourself, and therefore, this step is not applicable.

Figure 2-2: Manage Groups window

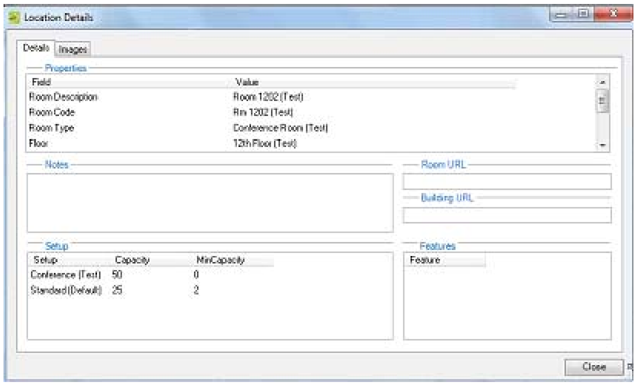

Manage Groups
Already Available
Find Groups begining with
Search
Top 59

Remove	Name	Type	City
☒	Ed Nowak	Management	

Add	Name	Type	City
⊞	Bryan Sorrentino	Sales - Corporate...	
⊞	Bryan Wendt	Sales - Corporate...	
⊞	Carter Cochran	Consulting	
⊞	Chris Binding	Marketing	
⊞	Chris Meyers	Development	
⊞	Christine Schneider	Marketing	

6. Optionally, before you select a room for the event, you can do one or more of the following:
   - Click the Information icon ⓘ next to a room to open a Locations Details dialog box that displays information about the room, such as its properties, setup type, features, images (if available), and so on.

Figure 2-3: Details dialog box showing information for a room


Location Details
Details
Images
Properties
Notes
Room URL
Building URL
Setup
Features
Close

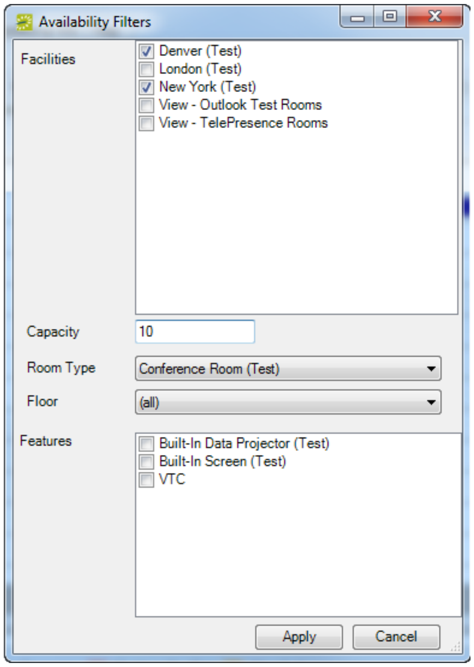
Field	Value
Room Description	Room 1202 (Test)
Room Code	Rm 1202 (Test)
Room Type	Conference Room (Test)
Floor	12th Floor (Test)

Setup	Capacity	MinCapacity
Conference (Test)	50	0
Standard (Default)	25	2

Feature

- Click Filter Filter above the list of rooms to open the Availability Filters dialog in which you can specify filters (Room Type, Floor, Features, and/or Capacity) to limit the display of available rooms.

Figure 2-4: Availability Filters



Facilities
☑ Denver (Test)
☐ London (Test)
☑ New York (Test)
☐ View - Outlook Test Rooms
☐ View - TelePresence Rooms

Capacity: 10

Room Type: Conference Room (Test)

Floor: (all)

Features
☐ Built-In Data Projector (Test)
☐ Built-In Screen (Test)
☐ VTC

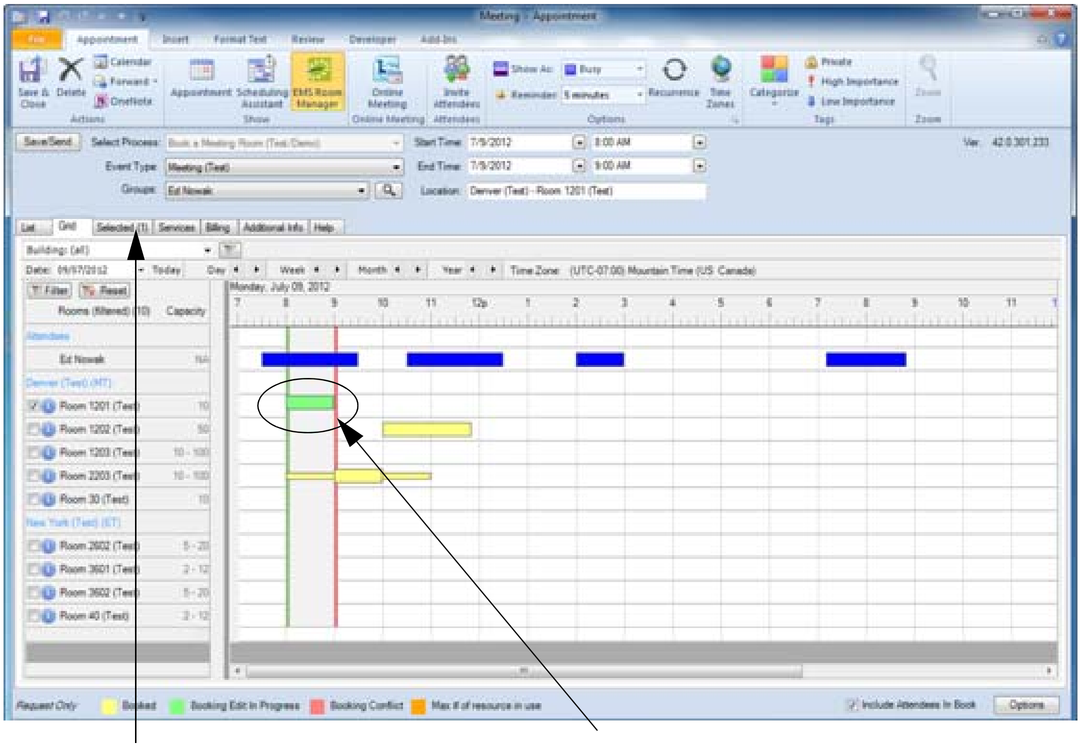
- On the Building dropdown list, select a specific building to the limit the display of available rooms to only those rooms in the selected building.

You can also create list of favorite rooms that can be searched for availability when you are scheduling a meeting. See "To create a list of Favorite rooms" on page 26.

7. Select the event room.

   A "Booking Edit in Progress" status (green color) is displayed for the room. The Selected tab indicates that one room has been selected for an event. (See Figure 2-5 on page 22.) Also, Setup and Teardown times might be displayed for the selected room. You can place your cursor on the entry for a room to view information about the scheduled event. (See Figure 2-6 on page 22.)

Figure 2-5: Booking Edit in Progress status for a room



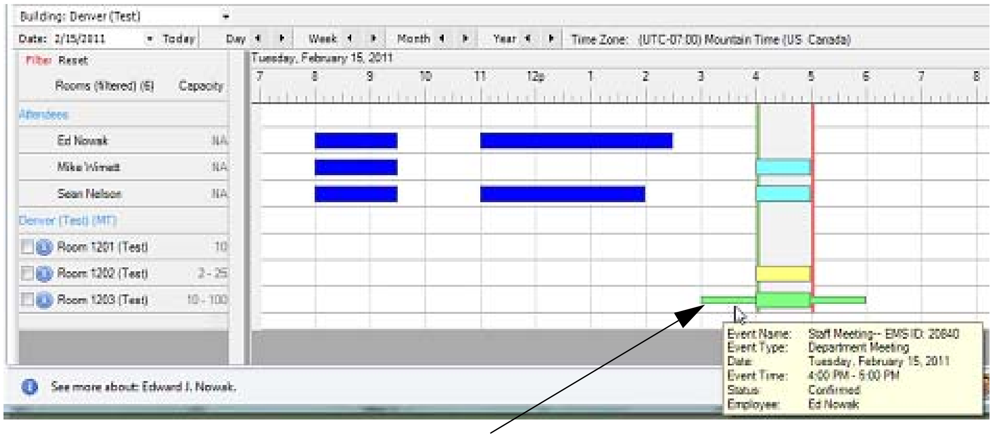
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Event Type: Meeting (Test)
Groups: Ed Nowak
Location: Denver (Test) - Room 1201 (Test)
Time Zone: (UTC-07:00) Mountain Time (US Canada)

Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
EMS Room Manager
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Monday, July 09, 2012
Ed Nowak
Room 1201 (Test)
Room 1202 (Test)
Room 1203 (Test)
Room 2203 (Test)
Room 30 (Test)
Room 2602 (Test)
Room 3601 (Test)
Room 3602 (Test)
Room 40 (Test)
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book
Options

Selected tab indicates that one room has been scheduled.

Booking Edit in Progress status for a scheduled room. Bar indicates the event time and location

Figure 2-6: Setup and teardown times displayed for a selected room



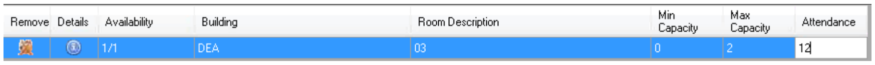
Event Name: Staff Meeting-- EMS ID: 20840
Event Type: Department Meeting
Date: Tuesday, February 15, 2011
Event Time: 4:00 PM - 5:00 PM
Status: Confirmed
Employee: Ed Nowak

Building: Denver (Test)
Date: 2/15/2011
Time Zone: (UTC-07:00) Mountain Time (US Canada)
Tuesday, February 15, 2011
Ed Nowak
Mike Wimett
Sean Nelson
Room 1201 (Test)
Room 1202 (Test)
Room 1203 (Test)
See more about: Edward J. Nowak.

Left bar indicates setup time. Middle bar indicates event time and location. Right bar that indicates teardown time. Place your cursor on the room entry to view information about the scheduled event.

8. Optionally, open the Selected tab to view information about the selected room, such as the building in which it is located, its description, and its capacity. If needed, you can do one or both of the following:
   - Click Remove to remove the room for the scheduled event so that you can select a different room.
   - Edit the attendance in the Attendance column.

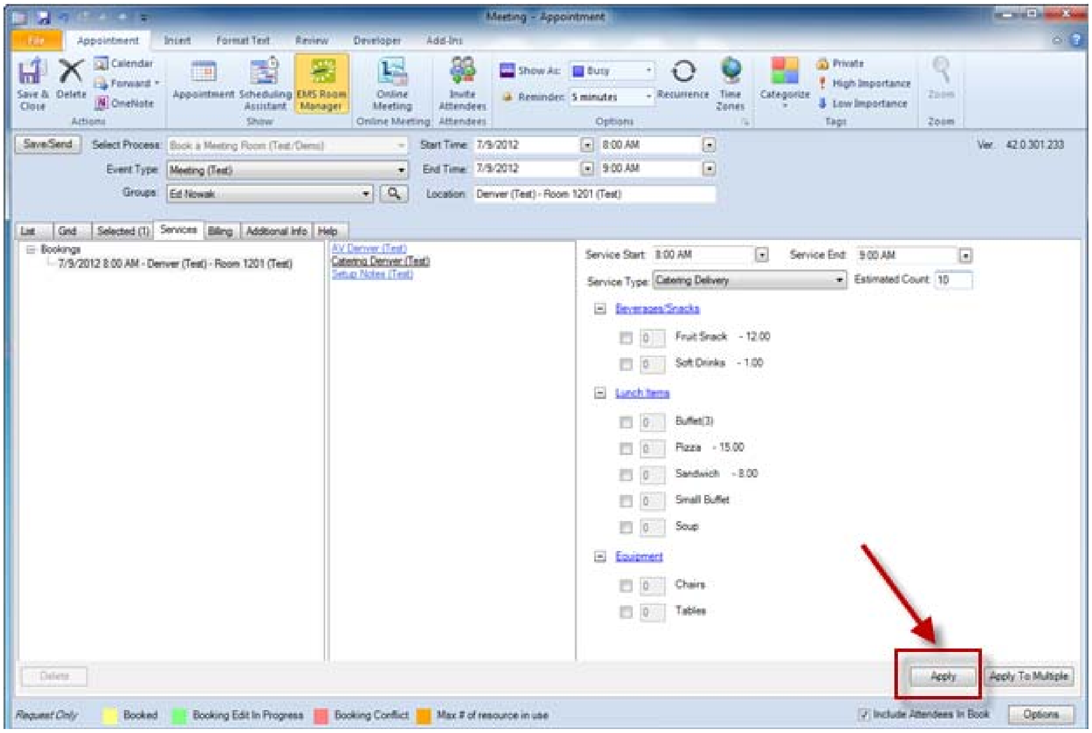
Figure 2-7: Selected tab showing a room selected for a meeting



Remove	Details	Availability	Building	Room Description	Min Capacity	Max Capacity	Attendance
		1/1	DEA	03	0	2	12

9. Optionally, you might be able to request services for the event, supply billing information for the event, and/or answer additional questions about the event.
   - Services tab—The Services tab might be available for requesting one or more services for the event, such as Catering, A/V Equipment, and so on. If you can request services for an event, you might be required to make selections for some of these services and you might also be required to answer questions about the services that you select. After you select a service for an event, click Apply to add the service to the event.

Figure 2-8: Services tab for a single booking



Meeting - Appointment

Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233

Bookings
7/9/2012 8:00 AM - Denver (Test) - Room 1201 (Test)

AV Denver (Test)
Catering Denver (Test)
Setup Notes (Test)

Service Start: 8:00 AM
Service End: 9:00 AM
Service Type: Catering Delivery
Estimated Count: 10

Beverages/Snacks
☐ 0 Fruit Snack - 12.00
☐ 0 Soft Drinks - 1.00

Lunch Items
☐ 0 Buffet(3)
☐ 0 Pizza - 15.00
☐ 0 Sandwich - 8.00
☐ 0 Small Buffet
☐ 0 Soup

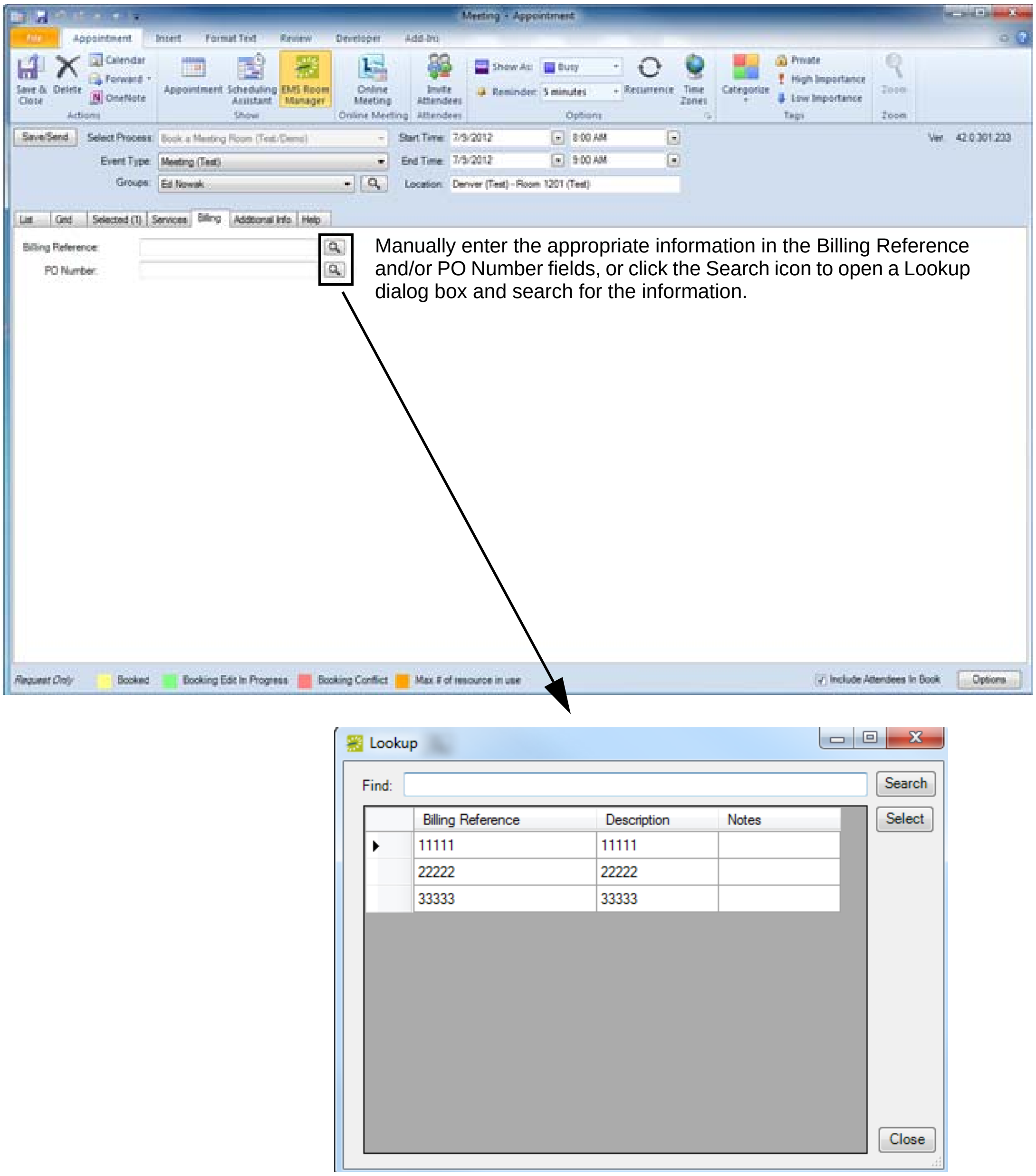
Equipment
☐ 0 Chairs
☐ 0 Tables

☑ Include Attendees In Book

File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As: Busy
Reminder: 5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Delete
Apply
Apply To Multiple
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Options

- Billing tab—The Billing tab might be available for providing billing information about the event. You can manually enter the billing information for the event, or you can click the Search icon 🔍 to open a Lookup dialog box and search for a specific billing reference number and/or PO number to add to the event.

Figure 2-9: Billing tab


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Options
Lookup
Search
Select
Close

Show As: Busy
Reminder: 5 minutes
Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233
Billing Reference:
PO Number:
☑ Include Attendees In Book

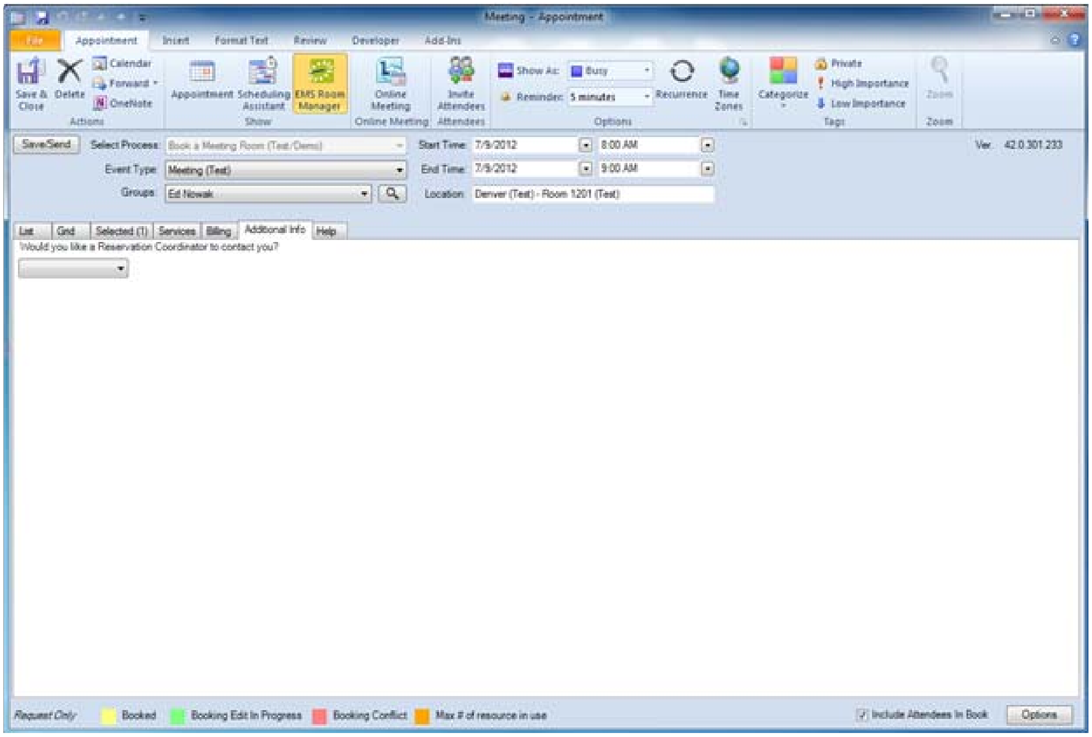
Manually enter the appropriate information in the Billing Reference and/or PO Number fields, or click the Search icon to open a Lookup dialog box and search for the information.

Find:

Billing Reference	Description	Notes
11111	11111	
22222	22222	
33333	33333	

- Additional Information tab—You might be required to answer one or more questions about the scheduled event, or the questions might be optional.

Figure 2-10: Additional Info tab


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Options

Show As: Busy
Reminder: 5 minutes
Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233

Would you like a Reservation Coordinator to contact you?

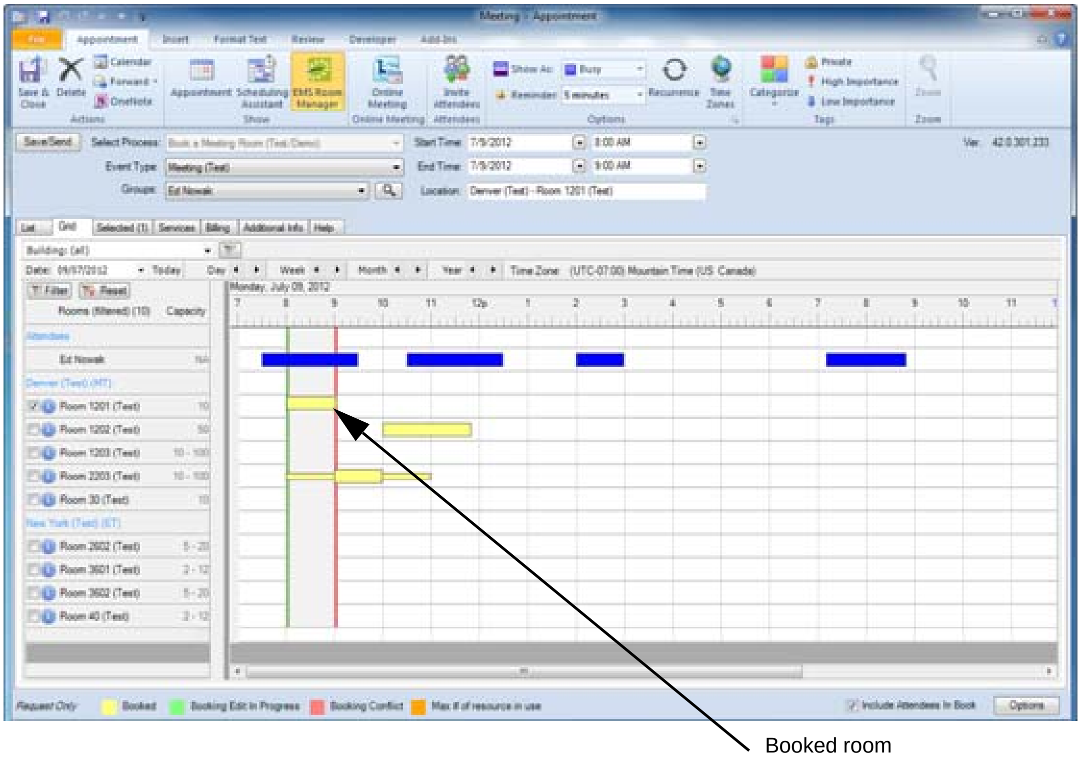
☑ Include Attendees In Book

- Help tab—The Help tab might contain custom help text or policies and procedures that are specific to your organization. You might want to open this tab and review this information before you complete the reservation.

10. Click Save/Send.

    The selected room is booked in the EMS database. The event is automatically added to your Outlook calendar. The invited meeting attendees receive a standard invitation for the meeting. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status is indicated as “Booked.” See Figure 2-11 on page 26.

Figure 2-11: Showing a room as booked in the EMS for Outlook plugin module



Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233
Building: (all)
Date: 09/07/2012
Time Zone: (UTC-07:00) Mountain Time (US Canada)
Monday, July 09, 2012

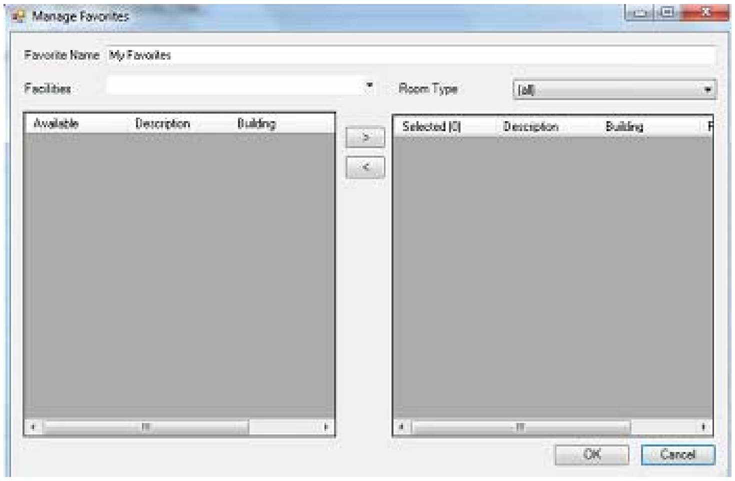
Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Invite Attendees
Attendees
Show As: Busy
Reminder: 5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Today
Day
Week
Month
Year
Filter
Reset
Rooms (filtered) (10)
Capacity
Attendees
Ed Nowak
Denver (Test) (MT)
Room 1201 (Test)
Room 1202 (Test)
Room 1203 (Test)
Room 2203 (Test)
Room 30 (Test)
New York (Test) (ET)
Room 2602 (Test)
Room 3601 (Test)
Room 3602 (Test)
Room 40 (Test)
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book
Options
Booked room

To create a list of Favorite rooms

1. Click Options.

   The Manage Favorites dialog box opens.

Figure 2-12: Manage Favorites dialog box



Favorite Name: My Favorites
Room Type: (all)

Manage Favorites
Facilities
Available
Description
Building
>
<
Selected (0)
Description
Building
OK
Cancel

2. On the Facilities dropdown list select a specific building.

   A list of all rooms in the selected building are displayed in the Available list.

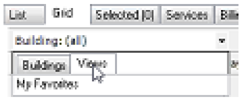
3. Optionally, on the Room Type dropdown list, select a specific room type by which to filter the list of displayed rooms.

4. 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.

5. Click OK.

   The Manage Favorites dialog box closes. The rooms in your Favorites list, which are available under Views, are the only rooms that are displayed in the EMS for Outlook plugin module after you select Views > My Favorites.

Figure 2-13: Opening your My Favorites list



Building: (all)

Creating a Series Reservation

You can search for rooms that are available for a particular time on multiple days and create a series reservation, which is a single reservation with multiple bookings.

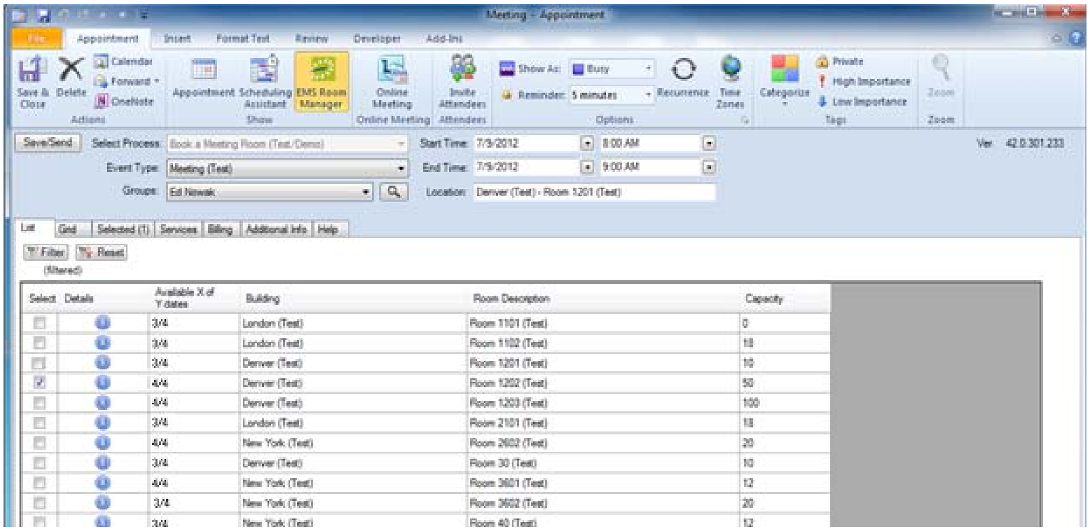
This section details the creation of a series reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see "Creating a Video Conference Reservation" on page 37.

To create a series reservation

1. Open Microsoft Outlook and create a standard *recurrent* event that includes the event subject, the date and time for the event, and invite the necessary attendees.
2. Click EMS Room Scheduling .

   By default, for a recurring meeting, the EMS for Outlook plugin module opens in the List view. The List view shows the availability for all the rooms. For example, in Figure 2-14 below, for a recurrent meeting with four meeting dates, Room 1201 is available for three out of the four meeting dates and Room 1202 is available for all four meeting dates.

Figure 2-14: Available rooms shown in List view


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As:
Busy
Reminder:
5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Filter
Reset
(filtered)

Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver 42.0.301.233

Select	Details	Available X of Y dates	Building	Room Description	Capacity
☐	●	3/4	London (Test)	Room 1101 (Test)	0
☐	●	3/4	London (Test)	Room 1102 (Test)	18
☐	●	3/4	Denver (Test)	Room 1201 (Test)	10
☑	●	4/4	Denver (Test)	Room 1202 (Test)	50
☐	●	4/4	Denver (Test)	Room 1203 (Test)	100
☐	●	3/4	London (Test)	Room 2101 (Test)	18
☐	●	4/4	New York (Test)	Room 2602 (Test)	20
☐	●	3/4	Denver (Test)	Room 30 (Test)	10
☐	●	4/4	New York (Test)	Room 3601 (Test)	12
☐	●	3/4	New York (Test)	Room 3602 (Test)	20
☐	●	3/4	New York (Test)	Room 40 (Test)	12

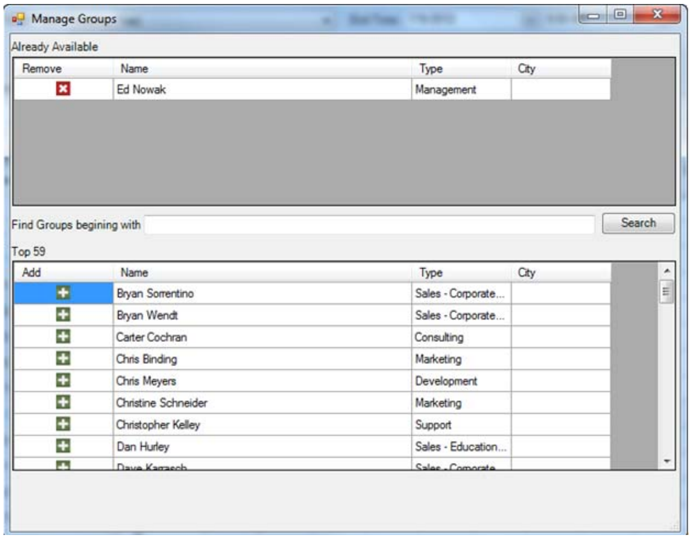
3. On the Select Process dropdown list, select the type of reservation that you are making.
4. On the Event Type list, select the event type for the event.

The Start Time and the End Time are pulled from the initial event information that you specified when creating the event in Outlook. You cannot edit these values.

5. If applicable, click the Search icon next to the Groups field to open the Manage Groups window and search for the group for which you are making the reservation.

You might be able to make a reservation only for yourself, and therefore, this step is not applicable.

Figure 2-15: Manage Groups window



Already Available

Remove	Name	Type	City
☒	Ed Nowak	Management	

Find Groups begining with

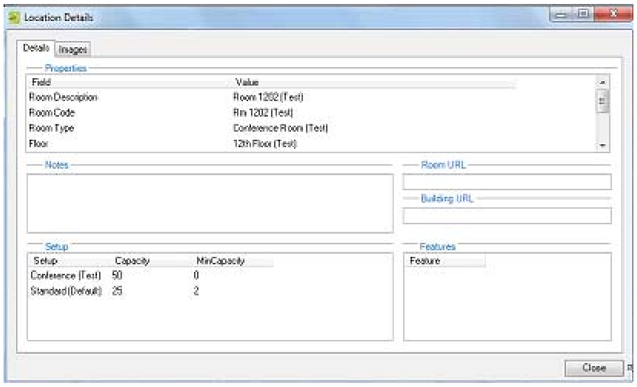
Top 59

Add	Name	Type	City
⊞	Bryan Sorrentino	Sales - Corporate...	
⊞	Bryan Wendt	Sales - Corporate...	
⊞	Carter Cochran	Consulting	
⊞	Chris Binding	Marketing	
⊞	Chris Meyers	Development	
⊞	Christine Schneider	Marketing	
⊞	Christopher Kelley	Support	
⊞	Dan Hurley	Sales - Education...	

6. Optionally, before you select a room for the event, you can do one or more of the following:

   - Click the Information icon next to a room to open a Locations Details dialog box that displays information about the room, such as its properties, setup type, features, images (if available), and so on.

Figure 2-16: Details dialog box showing information for a room



Properties

Field	Value
Room Description	Room 1202 (Test)
Room Code	Rm 1202 (Test)
Room Type	Conference Room (Test)
Floor	12th Floor (Test)

Setup

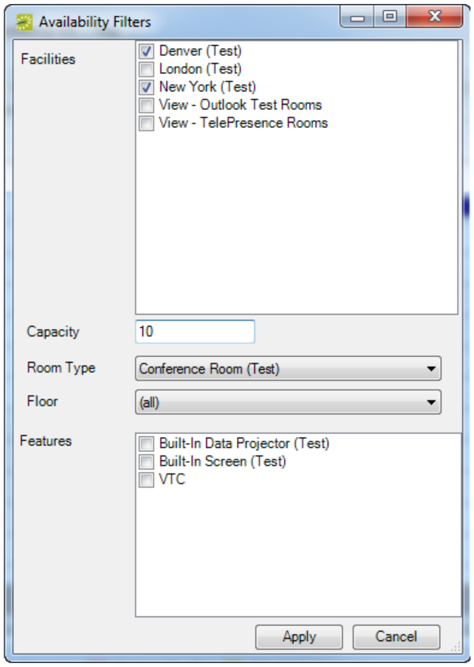
Setup	Capacity	MinCapacity
Conference (Test)	50	0
Standard (Default)	25	2

Features

Feature

- Click Filter Filter above the list of rooms to open the Availability Filters dialog in which you can specify filters (Room Type, Floor, Features, and/or Capacity) to limit the display of available rooms.

Figure 2-17: Availability Filters



Availability Filters

Facilities
☑ Denver (Test)
☐ London (Test)
☑ New York (Test)
☐ View - Outlook Test Rooms
☐ View - TelePresence Rooms

Capacity: 10

Room Type: Conference Room (Test)

Floor: (all)

Features
☐ Built-In Data Projector (Test)
☐ Built-In Screen (Test)
☐ VTC

- On the Building dropdown list, select a specific building to the limit the display of available rooms to only those rooms in the selected building.

You can also create list of favorite rooms that can be searched for availability when you are scheduling a meeting. See “To create a list of Favorite rooms” on page 26.

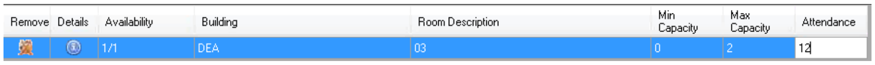
7. Select the event room.

   The Selected tab indicates that one room has been selected for an event.

You can select a room even if the room is not available for all the event dates. The room will be marked as being in conflict in the EMS for Outlook plugin module, and you can resolve this conflict for each occurrence in a series reservation as needed. See “To resolve a booking in conflict” on page 35.

8. Optionally, open the Selected tab to view information about the selected room, such as the building in which it is located, its description, and its capacity. If needed, you can do one or both of the following:
   - Click Remove to remove the room for the scheduled event so that you can select a different room.
   - Edit the attendance in the Attendance column.

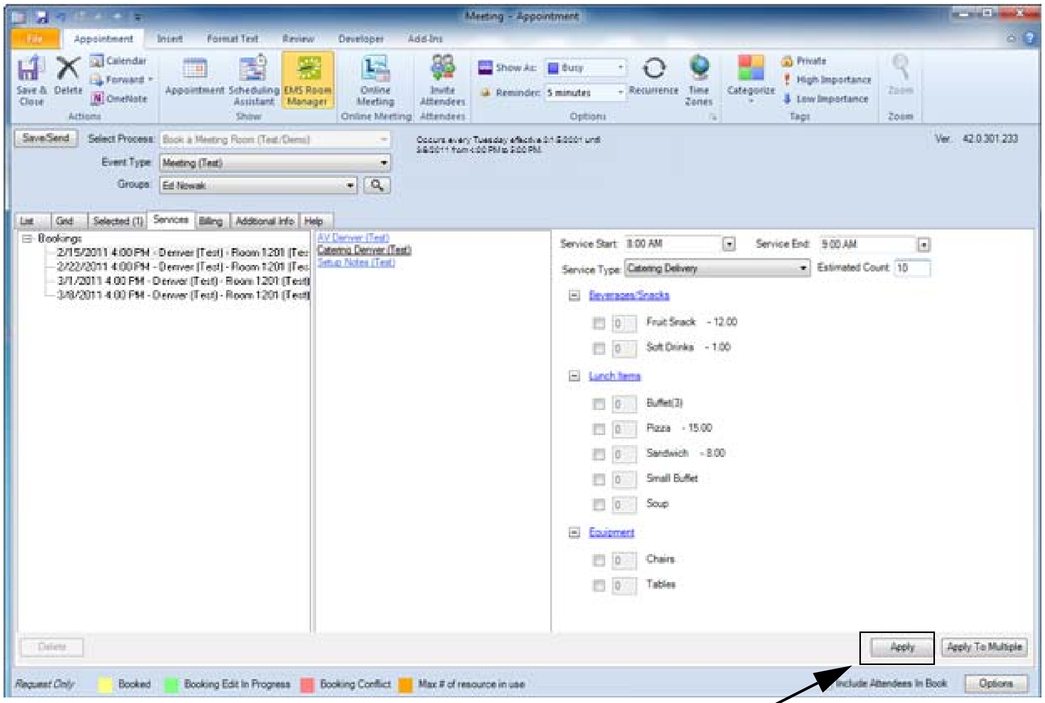
Figure 2-18: Selected tab showing a room selected for a meeting



Remove	Details	Availability	Building	Room Description	Min Capacity	Max Capacity	Attendance
		1/1	DEA	03	0	2	12

9. Optionally, you might be able to request services for the event, supply billing information for the event, and/or answer additional questions about the event.
   - Services tab—The Services tab might be available for requesting one or more services for the event, such as Catering, A/V Equipment, and so on. If you can request services for an event, you might be required to make selections for some of these services and you might also be required to answer questions about the services that you select. You can select a single booking, and then click Apply to the apply the service to the selected booking, or you can click Apply to Multiple to open the Apply to Additional Bookings dialog box and select the additional bookings to which to apply the services.

Figure 2-19: Services tab for multiple bookings


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As:
Busy
Reminder:
5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Delete
Apply
Apply To Multiple
Options
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book

Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Ver. 42.0.301.233

Bookings
2/15/2011 4:00 PM - Denver (Test) - Room 1201 (Te:
2/22/2011 4:00 PM - Denver (Test) - Room 1201 (Te:
3/1/2011 4:00 PM - Denver (Test) - Room 1201 (Test)
3/8/2011 4:00 PM - Denver (Test) - Room 1201 (Test)

AV Denver (Test)
Catering Denver (Test)
Setup Notes (Test)

Service Start: 8:00 AM
Service End: 9:00 AM
Service Type: Catering Delivery
Estimated Count: 10

Beverages/Snacks
☐ 0 Fruit Snack - 12.00
☐ 0 Soft Drinks - 1.00

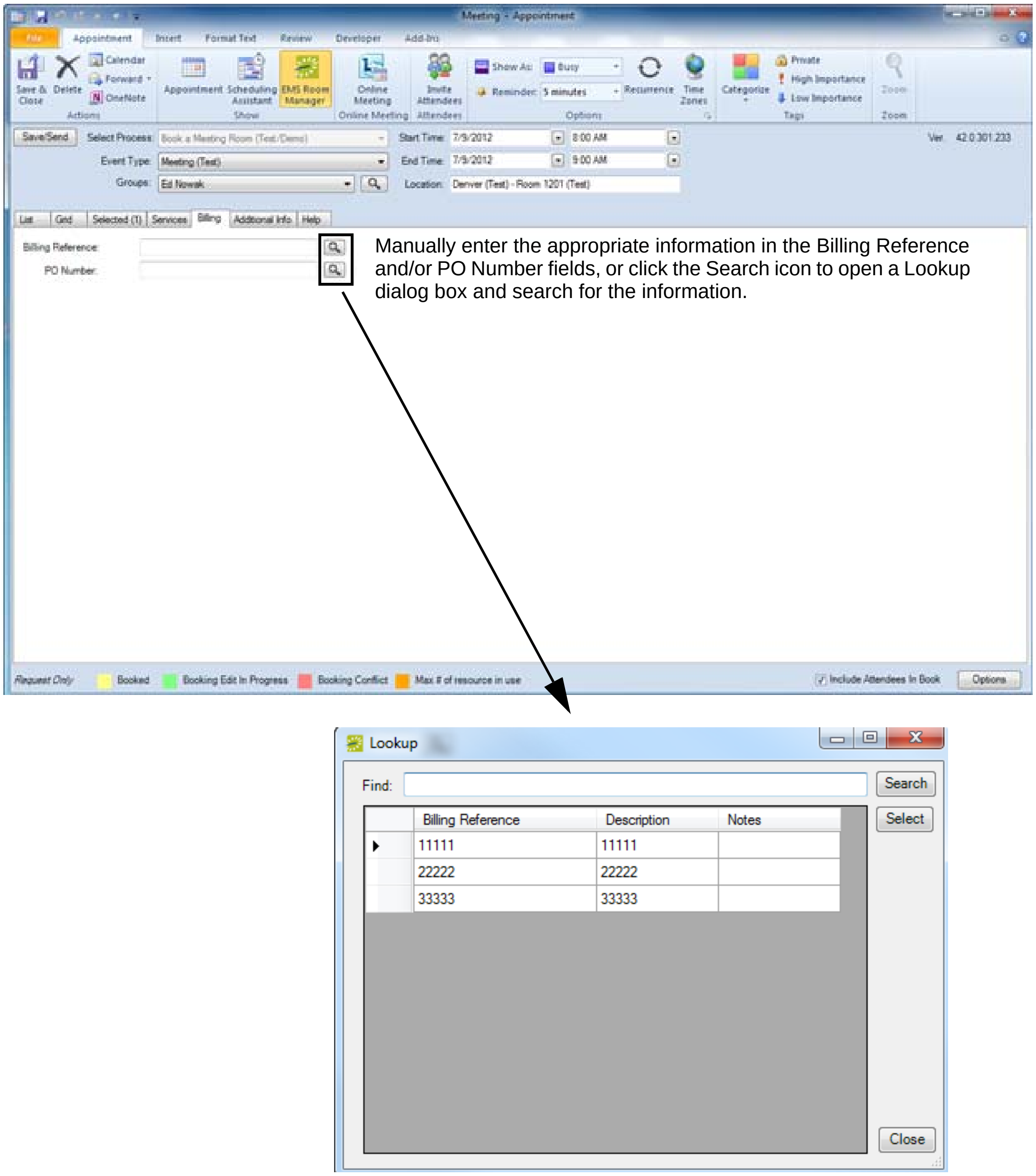
Lunch Items
☐ 0 Buffet(3)
☐ 0 Pizza - 15.00
☐ 0 Sandwich - 8.00
☐ 0 Small Buffet
☐ 0 Soup

Equipment
☐ 0 Chairs
☐ 0 Tables

You can apply the selected services to a single booking or to multiple bookings.

- Billing tab—The Billing tab might be available for providing billing information about the event. You can manually enter the billing information for the event, or you can click the Search icon 🔍 to open a Lookup dialog box and search for a specific billing number and/or PO number to add to the event.

Figure 2-20: Billing tab


Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As:
Reminder:
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book
Options
Lookup
Search
Select
Close

Show As: Busy
Reminder: 5 minutes
Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233
Billing Reference:
PO Number:

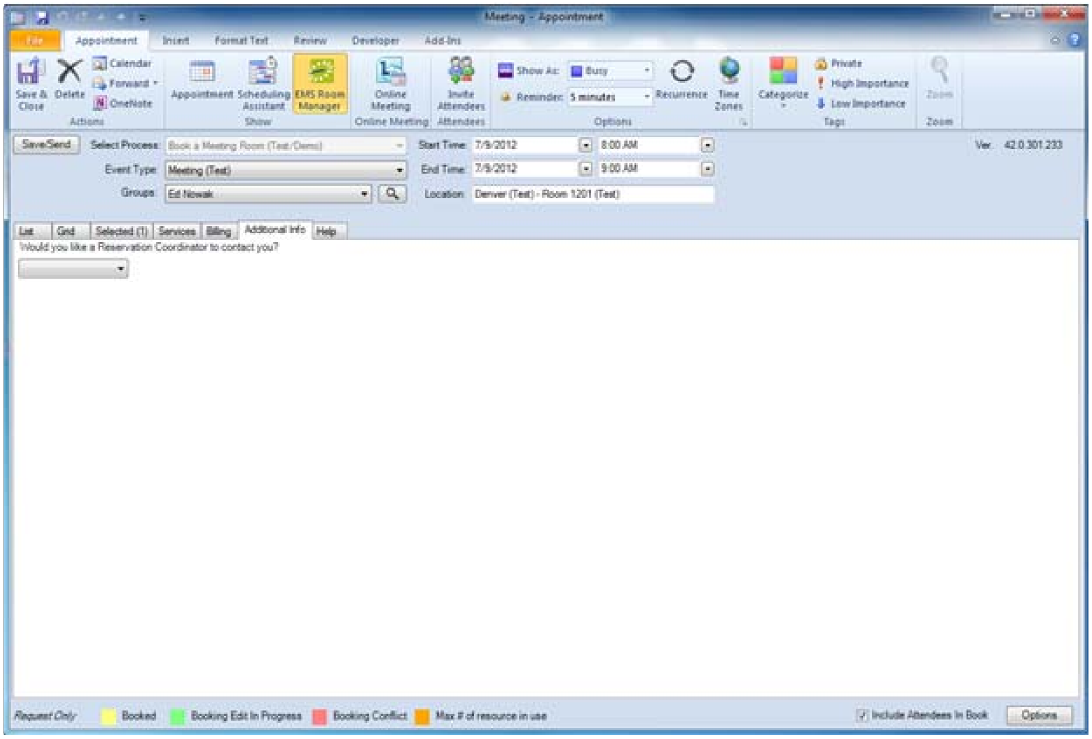
Manually enter the appropriate information in the Billing Reference and/or PO Number fields, or click the Search icon to open a Lookup dialog box and search for the information.

Find:

Billing Reference	Description	Notes
11111	11111	
22222	22222	
33333	33333	

- Additional Information tab—You might be required to answer one or more questions about the scheduled event, or the questions might be optional.

Figure 2-21: Additional Info tab



Meeting - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Request Only
🟨 Booked
🟩 Booking Edit In Progress
🟥 Booking Conflict
🟧 Max # of resource in use
Options

Show As: Busy
Reminder: 5 minutes

Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver. 42.0.301.233

Would you like a Reservation Coordinator to contact you?

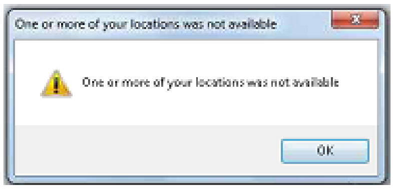
☑ Include Attendees In Book

- Help tab—The Help tab might contain custom help text or policies and procedures that are specific to your organization. You might want to open this tab and review this information before you complete the reservation

10. Click Save/Send.

    The selected room is booked in the EMS database. The event is automatically added to your Outlook calendar, even if the selected room was not available for all the dates. If the selected room was not available for one or more of the event dates, a message opens indicating this. As the meeting scheduler, you also receive a Booking Error email that indicates the reservation number and the bookings that were in conflict for the reservation.

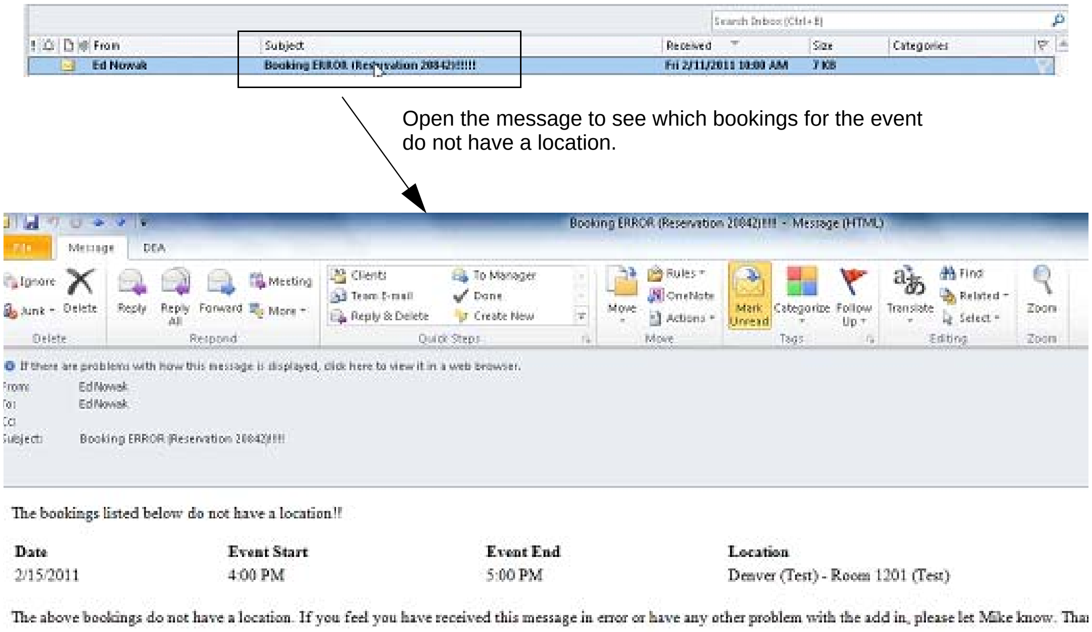
Figure 2-22: Message indicating that the one or more of the locations was not available



One or more of your locations was not available

One or more of your locations was not available

Figure 2-23: Booking error message for a booking conflict


Search Inbox (Ctrl+E)
From
Subject
Received
Size
Categories
File
Message
DEA
Ignore
Delete
Junk
Reply
Reply All
Forward
Meeting
More
Clients
Team E-mail
Reply & Delete
To Manager
Done
Create New
Quick Steps
Move
Rules
OneNote
Actions
Mark Unread
Categorize
Follow Up
Tags
Translate
Find
Related
Select
Editing
Zoom
Respond

From	Subject	Received	Size	Categories
Ed Nowak	Booking ERROR (Reservation 20842)!!!!!	Fri 2/11/2011 10:00 AM	7 KB	

Open the message to see which bookings for the event do not have a location.

Booking ERROR (Reservation 20842)!!!! - Message (HTML)

If there are problems with how this message is displayed, click here to view it in a web browser.

From: Ed Nowak
To: Ed Nowak
Cc:
Subject: Booking ERROR (Reservation 20842)!!!!

The bookings listed below do not have a location!!

Date	Event Start	Event End	Location
2/15/2011	4:00 PM	5:00 PM	Denver (Test) - Room 1201 (Test)

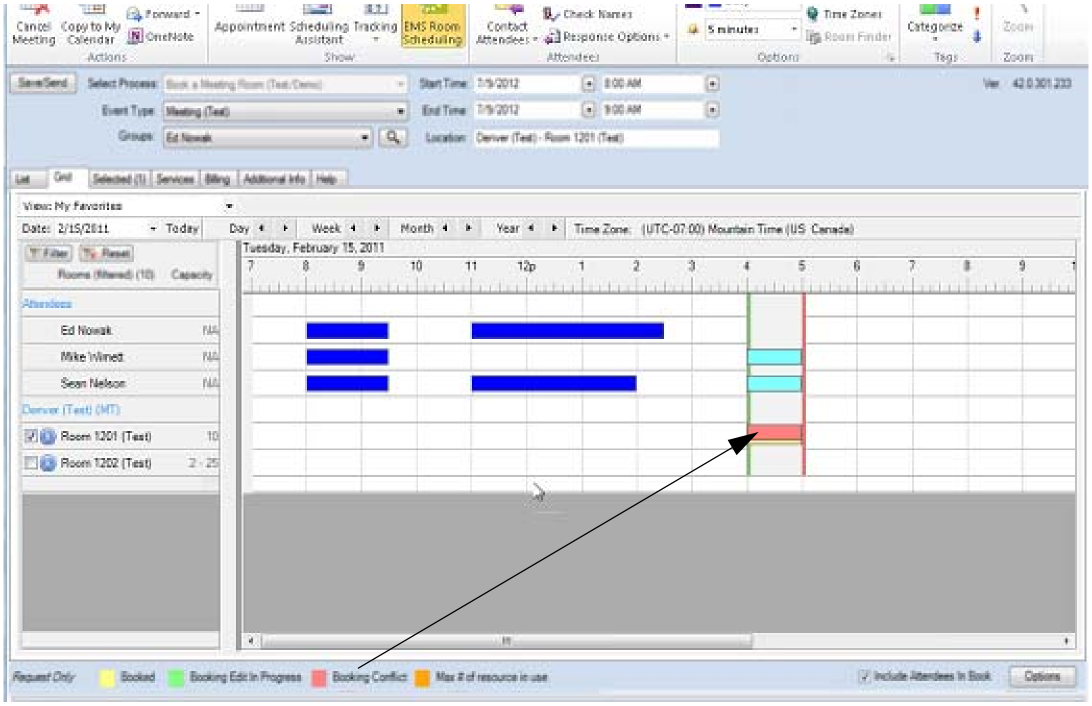
The above bookings do not have a location. If you feel you have received this message in error or have any other problem with the add in, please let Mike know. Tha

---

You can resolve this conflict for each occurrence in a series reservation as needed. See "To resolve a booking in conflict" on page 35.

Regardless of the meeting room availability, all the invited meeting attendees receive a standard Outlook invitation. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status is indicated as "Booked" for the event dates for which the room is available, and "Booking in Conflict" for the event dates for which the room is unavailable. See Figure 2-24 on page 35.

Figure 2-24: Showing a booking in conflict the EMS for Outlook plugin module


Cancel Meeting
Copy to My Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
Tracking
EMS Room Scheduling
Show
Contact Attendees
Check Names
Response Options
Attendees
5 minutes
Options
Time Zones
Room Finder
Categorize
Tags
Zoom
Save/Send
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Filter
Reset
Rooms (filtered) (10)
Capacity
Attendees
Ed Nowak
Mike Winest
Sean Nelson
Denver (Test) (MT)
Room 1201 (Test)
Room 1202 (Test)
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book
Options

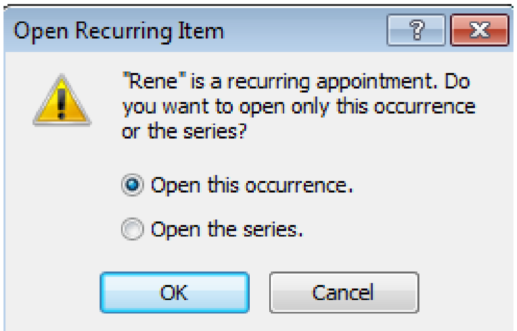
Select Process: Book a Meeting Room (Test/Demo)
Event Type: Meeting (Test)
Group: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver: 42.0.301.233
View: My Favorites
Date: 2/15/2011
Time Zone: (UTC-07:00) Mountain Time (US Canada)
Tuesday, February 15, 2011

To resolve a booking in conflict

1. Open your Outlook calendar.
2. In the calendar, double-click the event date for which a booking is in conflict.

   An Open Recurring Item message opens. The message indicates that the event recurring and asks you if want to open only this occurrence of the event, or the series.

Figure 2-25: Open Recurring Item message


Open Recurring Item
?
X
OK
Cancel

"Rene" is a recurring appointment. Do you want to open only this occurrence or the series?

● Open this occurrence.
○ Open the series.

3. Leave Open this occurrence selected, and then click OK.

   The EMS for Outlook plugin module opens, showing the booking that is in conflict.

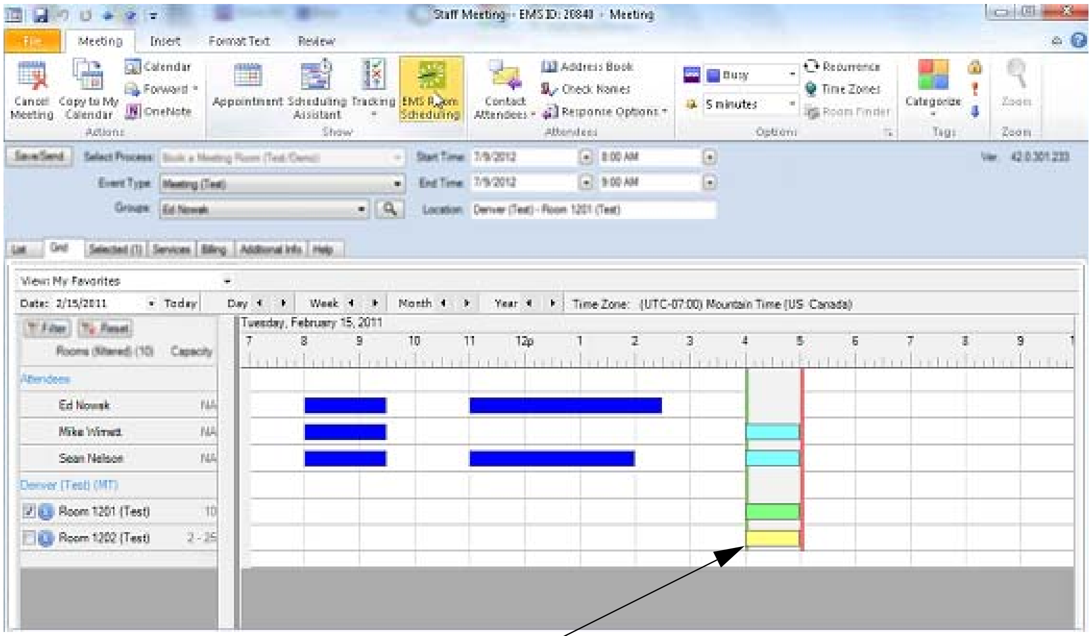
4. In the Rooms list, select a room that is available for the booking.

   The booking status is changed from Booking Conflict to Booking Editing in Progress.

5. Click Save/Send.

   The selected room is booked in the EMS database. The event is updated in your Outlook calendar to reflect the new location. All the invited meeting attendees receive a standard Outlook message about the updated meeting location. The invitees accept or decline the meeting invitation as they normally would in Outlook. The next time that you open the EMS for Outlook plugin module and show the date of the scheduled event, the room status for the newly selected room is indicated as “Booked” for the event date.

Figure 2-26: Room status now showing as booked for an event date that was in conflict



Staff Meeting - EMS ID: 20840 - Meeting

Event Type: Meeting (Test)
Group: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 1201 (Test)
Ver: 42.0.301.233
View: My Favorites
Date: 2/15/2011
Time Zone: (UTC-07:00) Mountain Time (US Canada)

File
Meeting
Insert
Format Text
Review
Cancel Meeting
Copy to My Calendar
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
Tracking
EMS Room Scheduling
Show
Contact Attendees
Address Book
Check Names
Response Options
Attendees
Busy
5 minutes
Recurrence
Time Zones
Room Finder
Options
Categorize
Tags
Zoom
Save/Send
Select Process:
List
Grid
Selected (1)
Services
Billing
Additional Info
Help
Today
Day
Week
Month
Year
Filter
Reset
Rooms (filtered) (10)
Capacity
Tuesday, February 15, 2011
7
8
9
10
11
12p
1
2
3
4
5
6
7
8
9
Attendees
Ed Nowak
Mike Wimet
Sean Nelson
NA
Denver (Test) (MT)
☑ Room 1201 (Test)
10
☐ Room 1202 (Test)
2 - 25

Different room showing as booked for an event date.

6. Repeat Step 1 through Step 5 for each booking date that is in conflict.

Creating a Video Conference Reservation

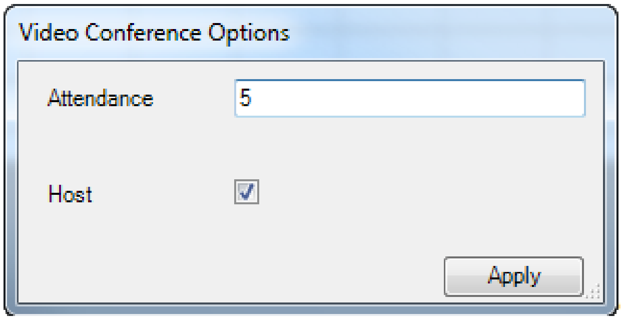
You can create a video conference reservation for both a single reservation and a series reservation. When you create a video conference reservation, two room options are available:

- The room is a dedicated video conferencing room. (The room has built-in video conferencing features.)
- The room has no built-in video conferencing features. Instead, you must use a mobile video conferencing cart in the room.

You follow the appropriate steps to create a single reservation (see "Creating a Single Reservation" on page 19) or a series reservation (see "Creating a Series Reservation" on page 28, noting the following differences for a video conference reservation:

- A video conference reservation requires two rooms. You must always designate the capacity for each room, and you must indicate which room is the *host* room.

Figure 2-27: Video Conference Room dialog box



Video Conference Options

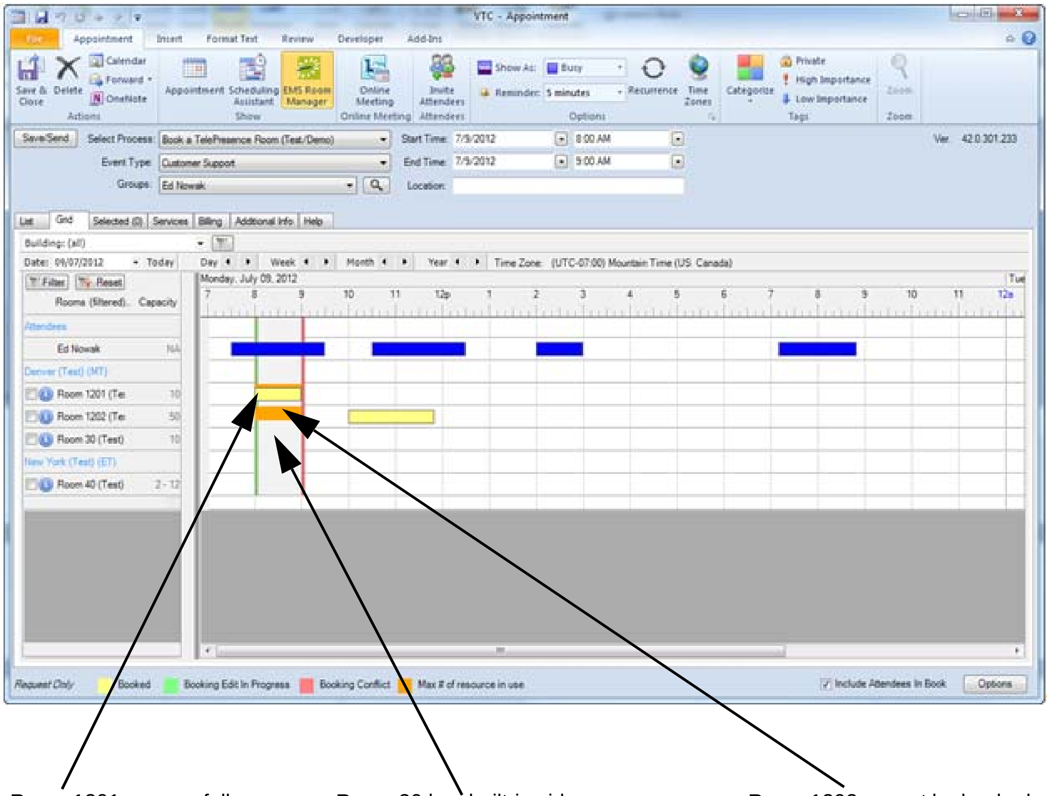
Attendance: 5

Host: ☑

- If a room that you select for a video conference reservation requires a mobile video conferencing cart, and at least one mobile video conferencing cart is available, then an orange line is displayed for the room. After you book the room, the standard booking color of yellow with an orange line above it is displayed to indicate that you have successfully booked the room and a cart for the room.
- If a room that you select for a video conference reservation requires a mobile video conferencing cart, but no carts (resources) are available to book, then a solid orange rectangle is displayed for the room to indicate that the maximum number of resources are in use and you cannot book the room.
- If a room that you select for a video conference reservation has built-in video conferencing features and the room is available to book, then no color is initially displayed for the room. After you book the room, the standard booking color of yellow is displayed to indicate that you have successfully booked the room.

After you successfully book a video conference reservation, the host room is indicated on the Selected tab. See Figure 2-28 on page 38 and Figure 2-30 on page 39.

Figure 2-28: Video Conference Room Availability Indicators


VTC - Appointment
File
Appointment
Insert
Format Text
Review
Developer
Add-Ins
Save & Close
Delete
Calendar
Forward
OneNote
Actions
Appointment
Scheduling Assistant
EMS Room Manager
Show
Online Meeting
Online Meeting
Invite Attendees
Attendees
Show As:
Busy
Reminder:
5 minutes
Recurrence
Time Zones
Options
Categorize
Private
High Importance
Low Importance
Tags
Zoom
Zoom
Save/Send
List
Grid
Selected (0)
Services
Billing
Additional Info
Help
Today
Day
Week
Month
Year
Filter
Reset
Rooms (filtered)..
Capacity
Attendees
Ed Nowak
NA
Denver (Test) (MT)
Room 1201 (Te
10
Room 1202 (Te
50
Room 30 (Test)
10
New York (Test) (ET)
Room 40 (Test)
2 - 12
Monday, July 09, 2012
Tue
7
8
9
10
11
12p
1
2
3
4
5
6
7
8
9
10
11
12a
Request Only
Booked
Booking Edit In Progress
Booking Conflict
Max # of resource in use
Include Attendees In Book
Options

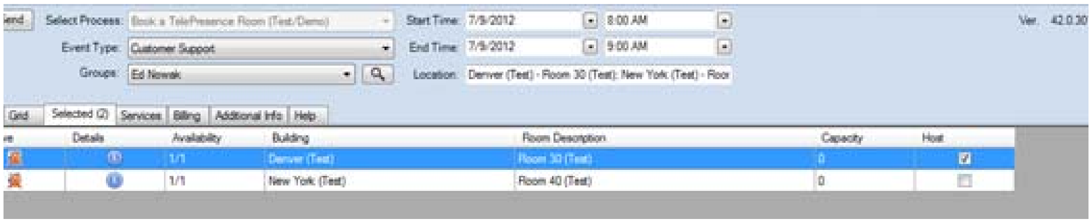
Select Process: Book a TelePresence Room (Test/Demo)
Event Type: Customer Support
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location:
Ver. 42.0.301.233
Building: (all)
Date: 09/07/2012
Time Zone: (UTC-07:00) Mountain Time (US, Canada)
☑ Include Attendees In Book

Room 1201 successfully booked with a mobile video conference cart.

Room 30 has built-in video conferencing features and is available for booking.

Room 1202 cannot be booked as no mobile video conferencing carts are available.

Figure 2-29: Host room indicated on the Selected tab for a video conference reservation


Send
Grid
Selected (2)
Services
Billing
Additional Info
Help

Select Process: Book a TelePresence Room (Test/Demo)
Event Type: Customer Support
Groups: Ed Nowak
Start Time: 7/9/2012 8:00 AM
End Time: 7/9/2012 9:00 AM
Location: Denver (Test) - Room 30 (Test); New York (Test) - Roo
Ver. 42.0.30

Details	Availability	Building	Room Description	Capacity	Host
	1/1	Denver (Test)	Room 30 (Test)	0	☑
	1/1	New York (Test)	Room 40 (Test)	0	☐

Editing or Canceling a Scheduled Event

You can edit or cancel both a single reservation and a series reservation in the EMS for Outlook plugin module.

To edit or canceled a scheduled event

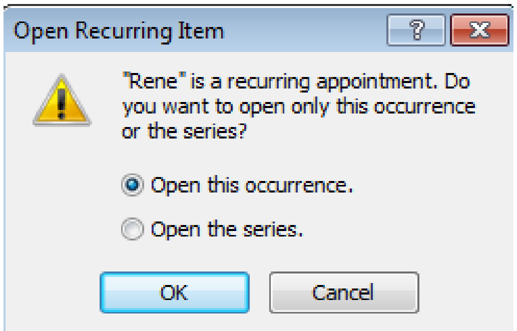
1. Open your Outlook calendar.
2. In the calendar, double-click an event date.
   - If the reservation is a single reservation, then the meeting information opens in the standard Outlook meeting format. If needed, edit the Start Time and/or End Time, and then click EMS Room Scheduling .

     The EMS for Outlook plugin module opens in the Grid view, which shows the attendees' free/busy schedules for the scheduled event date. (See Figure 2-1 on page 19.) You can edit any and all of the information for the scheduled event as needed (see Step 3 through Step 10 of "To create a single reservation" on page 19) or you can click Delete to cancel the event.

When you are editing an event, if you want to cancel a scheduled service, you can open the Services tab and clear the selection for the service.

   - If the reservation is a series reservation, then an Open Recurring Item message opens. The message indicates that the event is recurring and asks you if want to open only this occurrence of the event, or the series. Continue to Step 3.

Figure 2-30: Open Recurring Item message



"Rene" is a recurring appointment. Do you want to open only this occurrence or the series?

● Open this occurrence.

○ Open the series.

3. Do one of the following:
   - To edit the Start Time and/or End Time for a single occurrence of a series reservation, leave Open this occurrence selected, and then click OK.
   - To edit any value other than the Start Time and/or End Time for all bookings for a series reservation in a single step, select Open the series, and then click OK.
4. Click EMS Room Scheduling .

   The EMS for Outlook plugin module opens in the Grid view, which shows the attendees' free/busy schedules for the scheduled event date. (See Figure 2-1 on page 19.) You can edit any and all of the information for the scheduled event as needed (see Step 3 through Step 10 of "To create a series reservation" on page 28), or you can click Delete to cancel the event.

When you are editing an event, if you want to cancel a scheduled service, you can open the Services tab and clear the selection for the service.

Appendix A

EMS for Outlook Plugin Module Alerts and Error Messages

During the course of using the EMS for Outlook plugin module to schedule reservations and make appointments, you might encounter alerts and error messages. This appendix details the known alerts and error messages for the module and provides an explanation for each.

This appendix covers the following topics:

- "Known Alerts and Errors for the EMS for Outlook Plugin Module" on page 43.

Known Alerts and Errors for the EMS for Outlook Plugin Module

Alert/Error Message	Description
Alerts	
Resource Alert	Customer-specified resource alerts are displayed when a user selects a resource.
Room Alert	Customer-specified room alerts are displayed when a user selects a room.
Errors	
You have an unapplied service order. Are you certain you wish to continue?	Displayed if a user has entered a service order, but clicks Save before clicking Apply.
Appointment “SUBJECT” is tied to an EMS Booking.	Displayed when a user attempts to copy or cut a meeting on a calendar that is linked to EMS.
The meeting you are viewing is no longer being monitored by EMS. Changing this meeting will disconnect the meeting from EMS.	• Displayed if a user opens a meeting that has occurred in the past. • Prior to build 43.0.28 - In inconsistent scenarios, this message was displayed when a user created a creating on a delegate’s calendar and then tried to modify the meeting.
Your web user id does not match the web user id on the reservation. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a meeting for which they are not the web user.
This reservation has been invoiced. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a meeting that has been invoiced.
This reservation is assigned to a process template that is unavailable to you in Outlook. Any changes to this meeting will disconnect the meeting from the EMS Reservation.	Displayed when a user attempts to open a reservation that is tied to a process template to which they do not have access to or is not available in Outlook.
EMS requires all meetings be 24 hours or less.	Displayed if a user sets a start/end date/time combination to anything greater than 24 hours.

Alert/Error Message	Description
You changed the time after changing the location which invalidated your locations.	Displayed if a user: • Changes the meeting time after selecting a meeting location. • Changes the meeting recurrence any in way after selecting a location. **Note:** A user must verify a room after changing times or recurrences.
One or more of your locations was not available.	Displayed when a user attempts to save a meeting and one or more of the EMS rooms requested was not available.
One or more of your services violated the available quantity and was not applied to your meeting.	Displayed when a user attempts to save a meeting that has a service order and one or more of the resources had insufficient quantities available.
There was a problem saving your reservation in EMS.	Displayed when EMS encounters an unexpected error trying to save the reservation in EMS
Your request would violate the maximum allowed duration for a reservation ({0} minutes).	Displayed when a user attempts to add a booking that violates the Max Minutes Allowed value as specified by the Web Process template.
This template only allows for {0} booking(s) at a time.	Displayed when a user attempts to add a booking that violates the Max Number of Bookings value as specified by the Web Process template.
Terms must be accepted.	Displayed if a user does not select the option to accept Terms and Conditions.
Event type is required.	Displayed if a user attempts to submit an entry without an event type being selected.
Group is Required.	Displayed if a user has not selected a group. (Group label used in message.)
Use the Send Cancellation button on the appointment tab.	Displayed in the meeting cancel notification if a user attempts to press the EMS Save/Send button.
There was a problem updating one or more of your EMS bookings that are part of this recurring meeting. You may not have location for some of you times.	Displayed when an element failed while attempting to move a meeting on the Outlook calendar, typically because the location was not available for the time requested.
Bookings are not allowed before {0:d}.	Displayed if a user attempts to book a meeting prior to the first allowable booking date that is defined in the customer’s Web Process template.
This template allows only {0} bookings before {1:d}.	Displayed if a user attempts to book more bookings than allowed in the date range that is specified in the customer’s Web Process template.

Alert/Error Message	Description
This template allows only {0} bookings per date.	Displayed if a user attempts to book multiple bookings on a single day and the number exceeds the allowable amount that is defined in the customer’s Web Process template.
Problem with system timezone records.	Displayed if an unexpected time zone issue was encountered while saving a room.
Booking would exceed the twenty four hour limit.	Displayed when a user is selecting a room and the booking exceeds 24 hours in duration.
First available booking date violation.	Displayed if a user selects a room and the user has not specified enough advance lead time as defined in the user’s Web Process template.
Bookings not allowed to begin in the past.	Displayed when a user selects a room and the start time is prior to the current time.
Request violates building hours.	Displayed when a user selects a room and the booking falls outside the customer’s defined “Open” hours for the room’s building.
Request would create a conflict with another booking.	Displayed when a user selects a room and the room has a conflicting booking already on the calendar.
This template allows only {0} bookings before {1:d}.	Displayed when a user selects a room and the Web Process template specifies a limited allowable number of bookings.
You cannot book multiple parts of a combo room.	Displayed if a user attempts to book multiple pieces of the same combo room.
No locations match your criteria.	Displayed when changing tabs/applying a filter and no locations match.
No services selected.	Displayed when a user clicks Apply without first selecting a category or resource.
The grouping {0} of resource {1} requires that you select at least {2} item(s).	Displayed when a user attempts to apply services and the user has not met the minimum “”Selections”” requirement as defined by the customer.
The grouping {0} of resource {1} requires that you select no more than {2} item(s).	Displayed when a user attempts to apply services and the user has exceeded the maximum “Selections” requirement as defined by the customer.
You are adding a note, but didn’t supply a note.	Displayed while a user is applying services.
Service Start is required.	Displayed if a user applies services without specifying a service start time.
Service End is required.	Displayed if a user applies services without specifying a service end time.

Alert/Error Message	Description
Your service order times must be contained within event time.	Displayed if a user applies services and the service start/end times fall outside the event time.
Estimated Count is required.	Displayed if a user applies catering services without specifying the estimated count.
Your request does not meet the minimum amount of {0:F2}.	Displayed if a user applies services and the monetary total of the requested resources falls below the customer-specified minimum amount.
EMS For Outlook has not been initialized. Any changes made to meetings tied to EMS For Outlook will break the connection to EMS. Check network connectivity, then close and reopen Outlook. If the problem persists, please contact your local help desk.	Displayed when Outlook is opened and: • The user’s computer cannot contact to the PAM Web Service. • The EMS license is invalid. • The current user has no assigned Web Process templates. • The current user’s web user state is not Active.
Resource Not Available.	Displayed on a booking for a Video Conferencing template when the resource is unavailable because of a restrictive quantity.
x is not a valid date.	Displayed when a user enters bad data in a date field.
x is not a number.	Displayed when a user enters bad data in number field.
x is not a valid time.	Displayed when a user enters bad data in a time field.
You must supply a favorite name to continue.	Displayed when a user is defining favorites, but does not name the selection.
You must provide text to search.	Displayed if a user attempts to look up groups without specifying a name
You cannot remove the {0} you are tied to via external reference.	Displayed if a user attempts to remove their own group record from the selected groups on the group picker.
You cannot remove the {0} that is on the reservation you are currently editing.	Displayed if a user attempts to remove the group record assigned to the reservation they are currently editing.
{0} is required.	Displayed if a user has not completed filling out a User Defined Field that has been marked as required in the customer’s Web Process template.
You must supply a location to continue.	Displayed if a user attempts to add an Override description room without a location on a Video Conferencing template.
Attendance does not meet the minimum capacity ({0}) for the location.	Displayed if a user violates the minimum capacity of a room while booking a video conference.

Alert/Error Message	Description
Attendance does not meet the maximum capacity ({0}) for the location.	Displayed if a user violates the maximum capacity of a room while booking a video conference.
{0} is required.	Billing Reference/PO Number is required.
{0} must be valid.	Billing Reference/PO Number must be valid.
Video Conference Templates require one location to be Host.	Displayed if a user attempts to submit a video conference reservation without a video conferencing host.
{0} has a minimum quantity of {1}.	Displayed when a user selects a resource that has a minimum quantity.
{0} has a maximum available quantity of {1}.	Displayed when a user selects a service that has a maximum quantity.