



EMS MOBILE APP User Guide

V44.1

Last Updated: March 5, 2018

Table of Contents

CHAPTER 1: Introduction	. 1
System Requirements for EMS Mobile App	. 1
EMS Mobile or EMS Mobile Web App: What's the Difference?	. 2
EMS Mobile App = EMS Application for Mobile Devices	. 2
Features of EMS Mobile App (Which are Not in EMS Web App)	. 3
EMS Mobile App = EMS Web App on a Mobile Browser	. 3
Features of EMS Web App (Which are Not in EMS Mobile App)	. 3
How Do I Install It?	. 4
How Do I Use It?	. 4
CHAPTER 2: What's New	. 6
Designed for Everyday Users on the Go	. 6
EMS Mobile App Features Not in EMS Web App	. 7
EMS Web App Features Not in EMS Mobile App	. 7

What's New in the Update 9 Release	8
Performance: Changes to the Technology Stack	8
Functionality	8
CHAPTER 3: Get Started With EMS Mobile	9
CHAPTER 4: Log In, Reset Password, or Create an Account	10
Log In to EMS Mobile App	10
Reset Your Password	12
Create an Account	12
CHAPTER 5: Enter Your Server URL	14
CHAPTER 6: Search for Events	18
CHAPTER 7: Check In to Meetings	19
CHAPTER 8: Cancel a Meeting	21
CHAPTER 9: End a Meeting Early	24
CHAPTER 10: Assign Favorite Locations	26

CHAPTER 11: Remove a Favorite Location	31
CHAPTER 12: Scan QR Codes in EMS Mobile App	34
CHAPTER 13: Attend a Meeting	38
Check In to a Meeting	39
CHAPTER 14: Create a Meeting	41
CHAPTER 15: Find a Room	48
CHAPTER 16: Invite People	51
CHAPTER 17: Edit a Meeting	55
CHAPTER 18: Skype for Business in EMS Mobile App	57
Add Skype for Business to a Reservation	57
Join a Skype for Business Meeting	63



CHAPTER 1: Introduction

EMS Mobile App enables easy booking and scheduling on-the-go for mobile devices by enabling you to manage space on mobile devices, such as tablets and smartphones. Simple touchscreen gestures on mobile devices allow you to scan QR codes for rooms and to cancel, end, or check in to meetings.

SYSTEM REQUIREMENTS FOR EMS MOBILE APP

The EMS Mobile App—which includes the EMS Platform Services—has specific requirements on top of the general EMS server and database requirements.

NOTE: You must upgrade to EMS V44.1 (released June 30, 2016) to have the EMS Mobile App. It is not available for earlier versions of EMS.

Supported Platforms

Android 4.4, 5.0, 6.0

iOS 9.x, 10.x, 11.x



Prerequisites

To host and install EMS Mobile App, you will need the following:

EMS MOBILE OR EMS MOBILE WEB APP: WHAT'S THE DIFFERENCE?

Although their names are similar and they share the same databases, these products have very different applications.

EMS MOBILE APP = EMS APPLICATION FOR MOBILE DEVICES

This is a separate software application EMS produces specifically to run on mobile devices such as smartphones.

[&]quot;EMS database server, web server and Platform Services (see Requirements)

[&]quot;Mobile phone(s)



FEATURES OF EMS MOBILE APP (WHICH ARE NOT IN EMS WEB APP)

- " Ultra-compact display designed for smartphones
- "Two factor authentication method
- "QR Code functionality

EMS MOBILE APP = EMS WEB APP ON A MOBILE BROWSER

This is the EMS Web App as it displays when running on a web browser on a mobile device, such as a tablet.

FEATURES OF EMS WEB APP (WHICH ARE NOT IN EMS MOBILE APP)

- » Browse Events
- "Browse People
- "Act As (delegation feature)
- " Edit Account Details
- » Edit Delegates
- "Edit Everyday User Process templates



HOW DO I INSTALL IT?

If your organization has EMS Web Users licensing, no additional license for EMS Mobile App is required. Your administrator will need to:

- 1. Download the installation files from the EMS Customer Portal.
- 2. Install EMS Platform Services and connect to your organization's web server.
- 3. Set up user authentication.

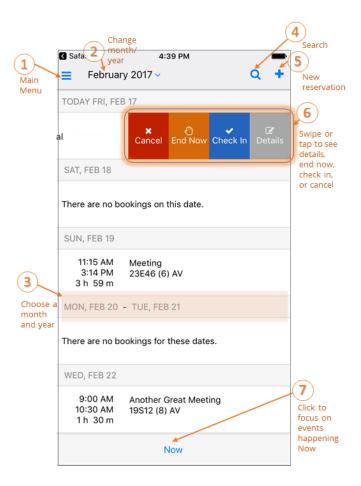
Once these components are in place, users at your organization can add EMS Mobile App to their mobile devices (as a private or public deployment) and enter your server URL and (optional) credentials to authenticate.

HOW DO I USE IT?

Once you've <u>logged in</u>, you can follow the tips below to interact with your calendar and see your events. Your calendar shows only current and upcoming events.



Mobile App: Using the Calendar



TIP: Get up to speed fast using ourEMS Mobile App Video Tutorials:

[&]quot;Booking a Desk or Meeting

[&]quot;Booking a Meeting By Scanning a QR Code



CHAPTER 2: What's New

DESIGNED FOR EVERYDAY USERS ON THE GO

EMS Mobile App, available on iOS and Android smartphones, is designed primarily for everyday users "on the go." It allows users to make simple reservations in unmanaged spaces (i.e., spaces without services and approvals), such as workspaces and open conference rooms. For example, everyday users may want to:

- "Book a meeting space with a few attendees while traveling from their hotel room
- "Change the time and/or room for an existing booking
- "View where their upcoming meeting is located
- "Check-in to or cancel their upcoming meeting

EMS Mobile App uses your phone's hardware features. You can use your phone's camera to scan a QR code to book or check-in to meetings. Administrators can set a proximity-based check-in distance so that users will be able to check-in to their meeting when they are within a certain distance of the building.



Although EMS Mobile App contains many features available on the desktopbrowser based EMS Web App, there are some key differences between the two.

EMS MOBILE APP FEATURES NOT IN EMS WEB APP

- " Hardware: location, camera
- Offline capability
- "Ability to integrate with other mobile apps (e.g., Maps)
- " Ultra-compact display designed for smartphones
- "Two-factor authentication method
- "QR Code functionality
- "Proximity-based location search
- "> Proximity-based check-in validation

EMS WEB APP FEATURES NOT IN EMS MOBILE APP

- » Browse events and people
- Act As (delegation feature)
- Edit account details
- Edit delegates
- Edit everyday user process template defaults
- " Create / edit service orders



WHAT'S NEW IN THE UPDATE 9 RELEASE

This release introduces several enhancements, summarized below (see also: Mobile App Release Notes for Update 9):

PERFORMANCE: CHANGES TO THE TECHNOLOGY STACK

- ** EMS Mobile API to new Middle-tier product: EMS Platform Services (the first EMS application to consume RESTful API)
- "React Native framework for app development
- "Updated architecture

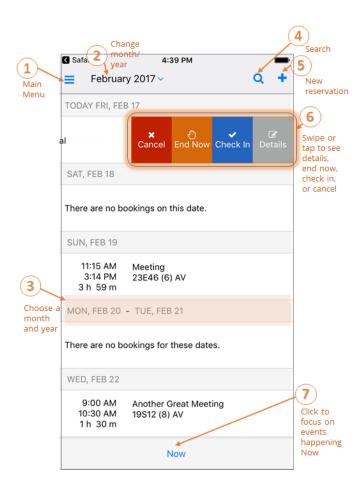
FUNCTIONALITY

- New user authentication options: new SSO authentication options, persistent authentication option, new EMS Mobile App Admin page
- "Create reservation: enhanced the filter for room search (now filters by Area, Building, Views, Capacity), smart defaults for start time and end time, time zone default to selected location
- "List view: removed past bookings, improved user interface improvements
- "Favorite rooms: added room filter



CHAPTER 3: Get Started With EMS Mobile

Once you've <u>Log In</u>, <u>Reset Password</u>, <u>or Create an Account</u>, you can follow the tips below to interact with your calendar and see your events. Your calendar shows only current and upcoming events.





CHAPTER 4: Log In, Reset Password, or Create an Account

This section provides instructions on:

- "Log In to EMS Mobile App
- "Reset Your Password
- "Create an Account

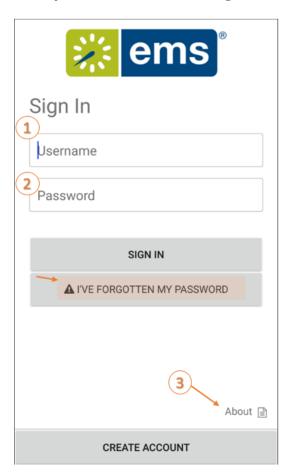
LOG IN TO EMS MOBILE APP

To log in to the EMS Mobile App:

1. Enter your **Username**.



2. Enter your Password. Click Sign In.



- 3. Click **About** to view the following information:
 - "Change API URL
 - " Version Information
 - " Location Services
 - " QR Code Scanner



Logs

"Import SSO Configuration

RESET YOUR PASSWORD

To reset your password:

- 1. If you've forgotten your password, navigate to the **Sign In** page and click the **I've** forgotten my password link.
- 2. Provide your username:
 - "If the username is in the EMS system, an email will be sent to the corresponding email address containing reset password instructions.
 - "If the username is not in the EMS system, you will receive an error message and no reset instructions will be sent via email.

CREATE AN ACCOUNT

TIP: The Create Account link displays only if your Administrator has enabled it and your EMS Mobile App has retained the EMS Native authentication. The CREATE ACCOUNT option is not available for Windows, LDAP, and SSO



authentications.

- 1. Click the Create Account link at the bottom of the Sign In screen.
- 2. You will be asked to provide:
 - a. Email Address
 - b. Password
 - c. Re-enter Password
 - d. EMS Server URL
 - e. Name
 - f. Phone 1
 - g. Time Zone
 - h. Additional Details
 - i. Accept the Terms of Use and Create Account
- 3. Click Create Account.

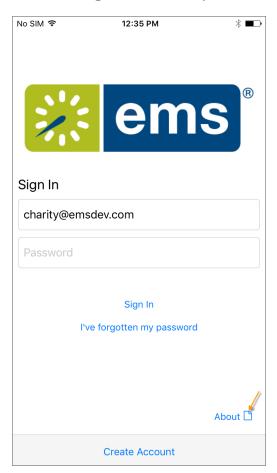


CHAPTER 5: Enter Your Server URL

You can view and/or change the API URL to which your EMS Mobile App points in one of two ways:

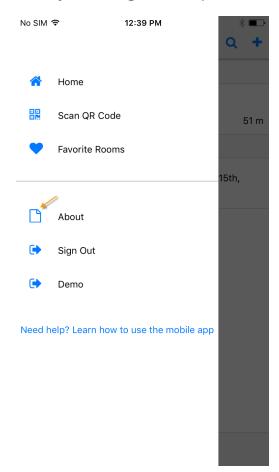


1. From the **Sign in** screen, tap **About** in the lower right-hand corner.



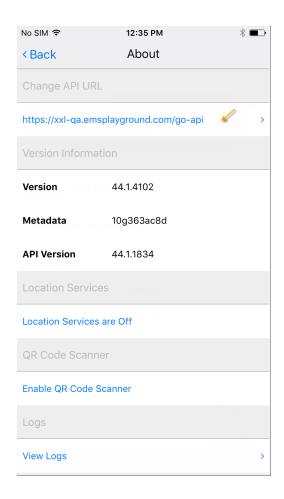


2. Once you are signed in, tap on the menu and navigate to the **About** screen.



3. Either option will allow you to view, enter, or change the URL. Check with your Administrator for the correct URL.





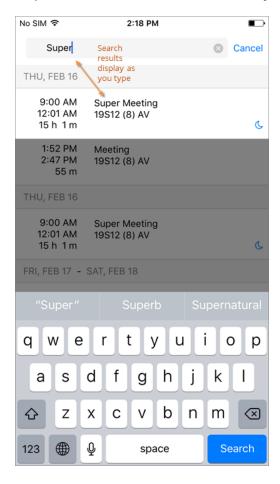
4. Tap **Connect** to finalize the new entry.



CHAPTER 6: Search for Events

To search for existing events:

1. Tap the Search icon and enter a keyword in the Search field.



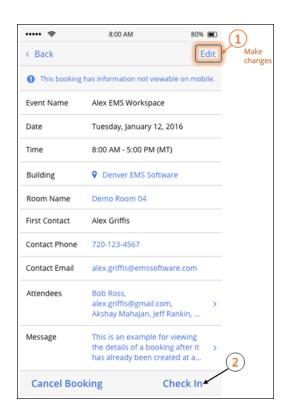


CHAPTER 7: Check In to Meetings

You can Check In to an event in one of two ways:

- 1. From the Calendar on the **Home** page, locate the event you want to check in to.
 - a. If it is with in the pre-determined check-in time period, a **Check In** option will appear when you swipe right. The meeting organizer or booking template usually determines how soon before a meeting you can check in.
- 2. You can also Check In by opening and/or editing an event.
 - a. Tap on the event and click **Edit** in the upper right-hand corner.
 - b. Click Check In.







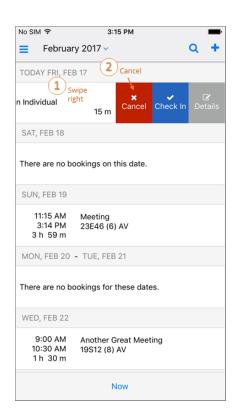
CHAPTER 8: Cancel a Meeting

You can cancel an existing meeting in one of two ways:

- 1. From the Calendar on the **Home** page, locate the meeting you want to cancel.
 - "If you are able to Cancel the meeting, a **Cancel** option will appear when you swipe right. The meeting organizer or booking template usually determines your permissions control and whether you can cancel a meeting. If enabled, attendees will be notified.



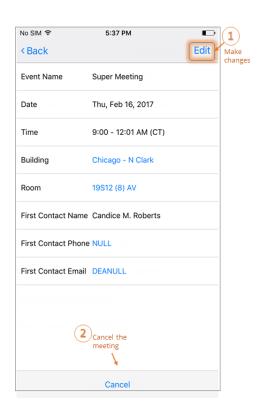
Accessing the Cancel Option





- 2. You can also Cancel by opening and/or editing an event.
 - "Tap on the event and click Edit in the upper right-hand corner. Click Cancel.

Cancel an Event Through Edit Screen





CHAPTER 9: End a Meeting Early

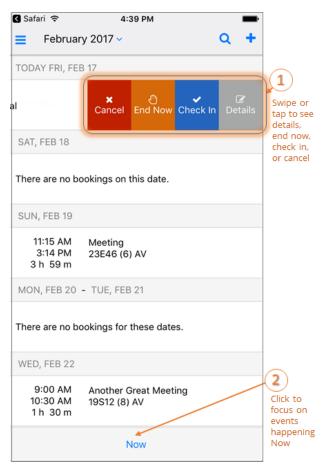
If your meeting has taken less than the reserved time, you can End a meeting early to release the space for others.

You can End a Meeting early in one of two ways:

- 1. From the Calendar on the **Home** page, locate the meeting you want to **End Now**.
 - a. If you are able to End the meeting, an **End Now** option will appear when you swipe right. The meeting organizer or booking template usually determines







- 2. You can also End a meeting by opening and/or editing an event.
 - b. Tap on the event and click Edit in the upper right-hand corner. Click End
 Now.

See Also: Invite People



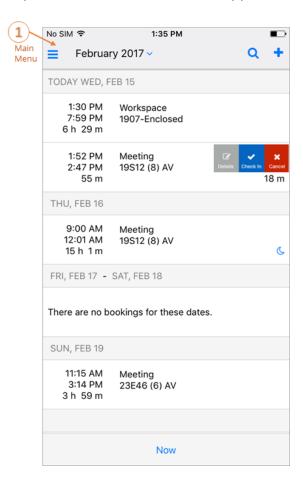
CHAPTER 10: Assign Favorite Locations

Assigning favorite locations streamlines the booking process and filters your location search results.

To assign a location as a favorite:

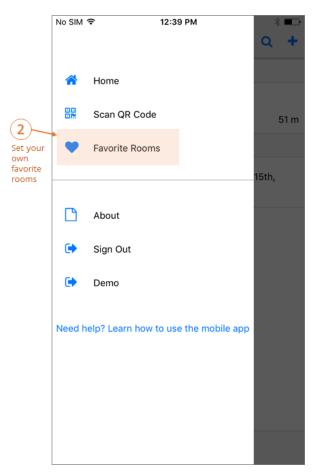


1. Tap the main menu icon in the upper left corner of the **Home** screen.



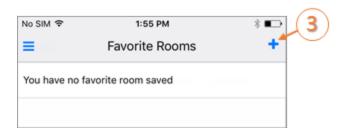


2. Tap Favorite Locations.

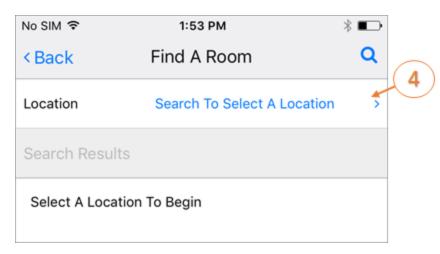




3. Click the + symbol to add Favorites.

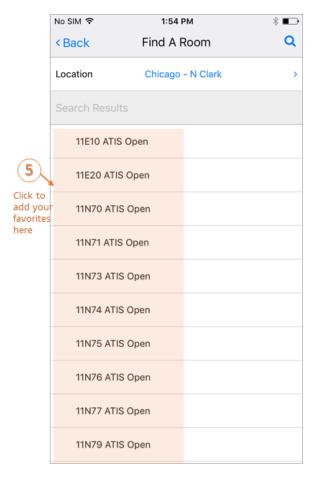


4. The Find a Location screen will appear. Search for rooms by Location.





1. Choose a location from the Search Results list. When you search for locations during the booking process, those that are in your favorites list will be listed first.





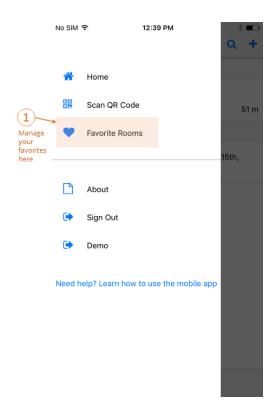
CHAPTER 11: Remove a Favorite Location

When you no longer wish to see a location listed first in search results, you can remove it from your personalized list.

To remove a Favorite Location:

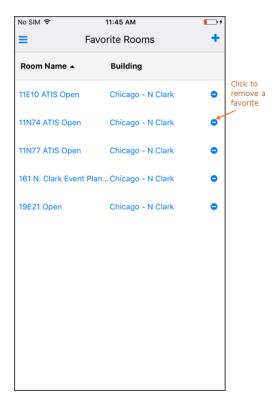
1. Navigate to your Favorites list by clicking on the main menu in the upper left corner of EMS Mobile App and selecting **Favorite Locations**.







2. Click the Remove icon to remove a Favorite from your list.





CHAPTER 12: Scan QR Codes in EMS Mobile App

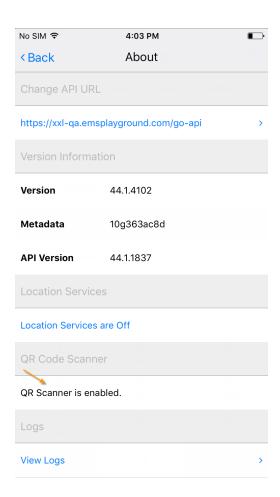
The QR Code Scanner feature of EMS Mobile App allows you to easily create a new booking or check in to a meeting you are hosting.

To create a new booking using the QR Code Scanner:

- You must first enable this functionality by navigating to the Main Menu on the Mobile App and tapping About.
- 2. Navigate to the **QR Code Scanner** field and ensure that the QR Code Scanner is enabled.

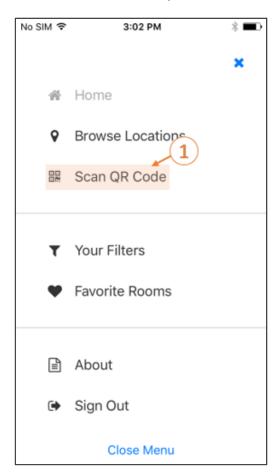


QR Code Scanner Field





3. When you are ready to Scan a QR Code using the EMS Mobile App, navigate to the Main Menu and tap **Scan QR Code**.



3. Scan the workspace QR Code. A new booking is created and will appear in your Calendar. From the EMS Mobile App, you can now:



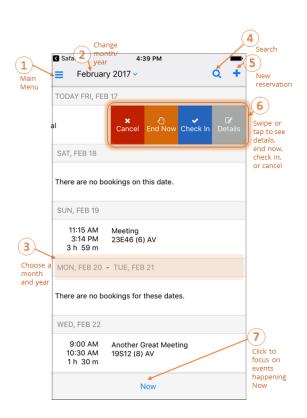
- » Book the room immediately (based on availability) using your assigned booking template(s).
- " Check in to the meeting (if you are the host).



CHAPTER 13: Attend a Meeting

Any events you have been invited to appear on your calendar on the home page of the EMS Mobile App.

Once you've <u>Log In</u>, <u>Reset Password</u>, <u>or Create an Account</u>, you can follow the tips below to interact with your calendar and see your events. Your calendar shows only current and upcoming events.



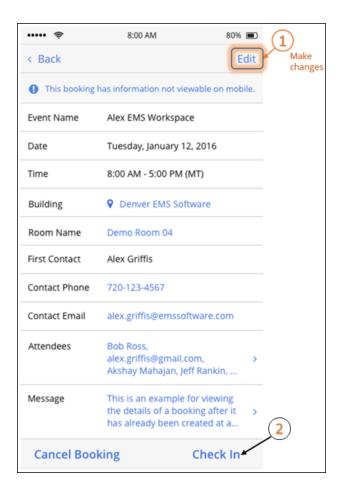


CHECK IN TO A MEETING

You can Check In to an event in one of two ways:

- 1. From the Calendar on the **Home** page, locate the event you want to check in to.
 - a. If it is with in the pre-determined check-in time period, a **Check In** option will appear when you swipe right. The meeting organizer or booking template usually determines how soon before a meeting you can check in.
- 2. You can also Check In by opening and/or editing an event.
 - a. Tap on the event and click Edit in the upper right-hand corner.
 - b. Click Check In.





See Also: Invite People



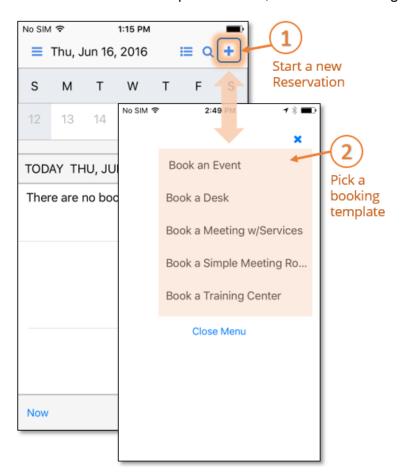
CHAPTER 14: Create a Meeting

The EMS Mobile App allows users to quickly create bookings in unmanaged spaces (or spaces without services and approvals), from the convenience of their mobile device.

To create a booking in the EMS Mobile App:

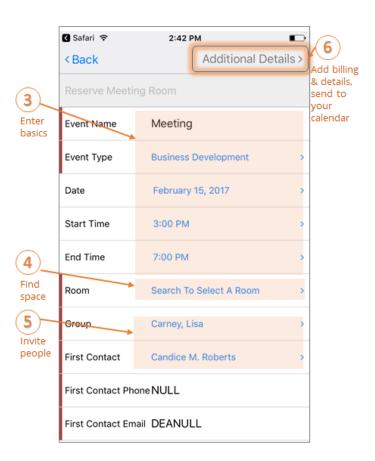


- 1. From the Calendar screen, tap the **New Reservation** (+) icon.
- 2. From the Select A Template screen, choose a booking template.



 Enter the required information for your booking (Event Name, Event Type, Room, Group, and First Contact). Fields that appear here vary depending on your booking template.

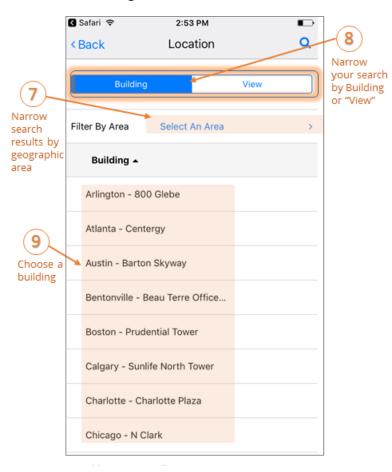




- 4. During the booking process, search for a room by performing the following steps:
 - a. On the New Reservation screen, click the Room field.
 - b. On the Find a Room screen, search and filter your room criteria by:
 - Location—the geographic or physical location of the space, such as a country, region, district, etc.
 - ii. **Building**—the building in which the space is located.

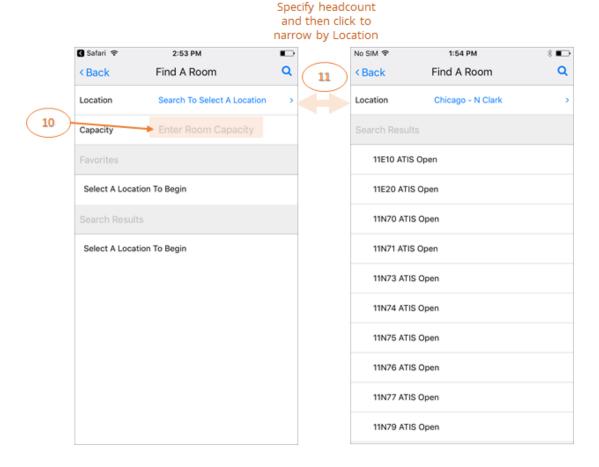


- iii. View—the custom grouping your Administrator may have defined to pool and classify types of space, such as Offices, Conference Rooms, Classrooms, or Campuses.
- iv. **Area**—the area of a Building or View in which the space resides, such as floor, plaza, hall, or project.
- c. Choose a **Building**.



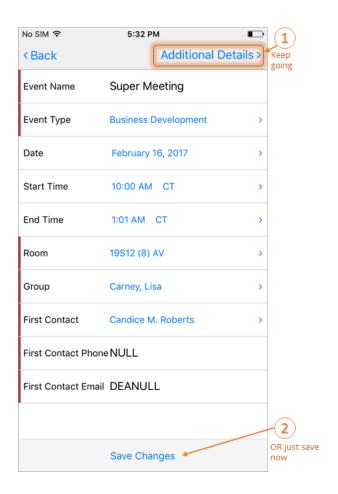


d. Enter the numeric Capacity (total number of attendees) for your meeting to narrow Location search results. Rooms meeting your criteria will appear in the Search Results.



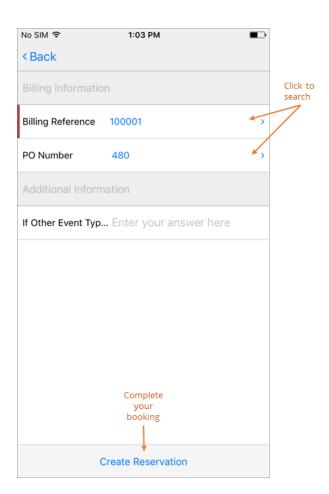
- e. When you click to select a room for your meeting, you will be redirected to the booking page and the room you chose will now appear on your meeting.
- 5. If the template allows, you may save and complete your reservation by clicking **Save Changes**. If the option is not available, continue to the next step.





Click Additional Details to add billing and PO numbers and other information as required.





7. When all required information is complete and valid, click **Create Reservation** to finalize your booking and return to the Home page, where your reservation will appear in the calendar.



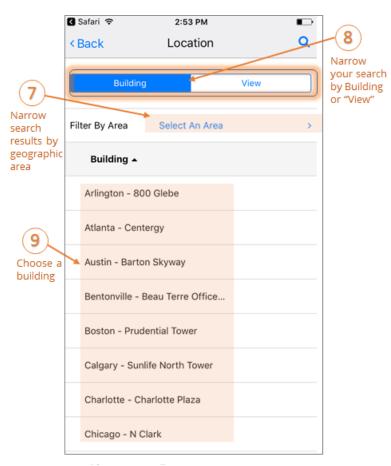
CHAPTER 15: Find a Room

During the booking process, search for a room by performing the following steps:

- 1. On the New Reservation screen, click the **Room** field.
- 2. On the Find a Room screen, search and filter your room criteria by:
 - a. Location = the geographic or physical location of the space, such as a country, region, district, etc.
 - b. **Building** = the building in which the space is located.
 - c. View = the custom grouping your Administrator may have defined to pool and classify types of space, such as Offices, Conference Rooms,
 Classrooms, or Campuses.
 - d. Area = the area of a Building or View in which the space resides, such as floor, plaza, hall, or project.

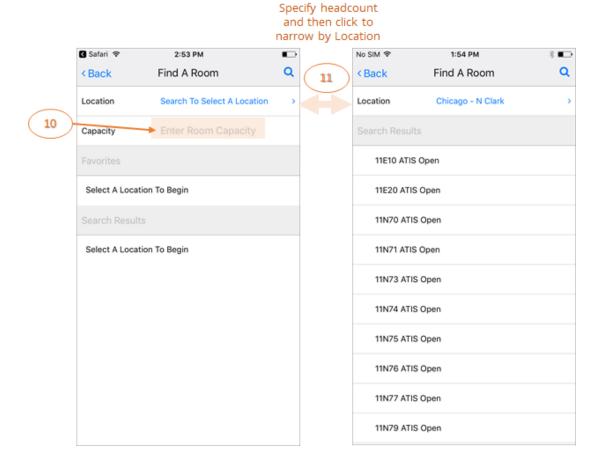


3. Choose a Building.



4. Enter the numeric **Capacity** (total number of attendees) for your meeting to narrow Location search results. Rooms meeting your criteria will appear in the Search Results.





5. When you click to select a room for your meeting, you will be redirected to the booking page, and the room you chose will now appear on your meeting.



CHAPTER 16: Invite People

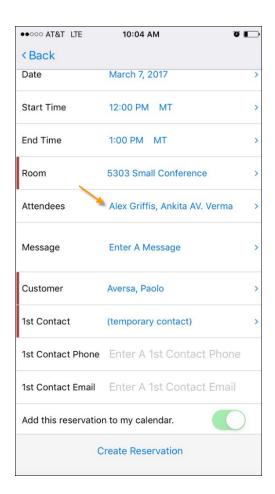
When inviting people to your meetings, it is important to understand the difference between Attendees and Groups. **Attendees** are individuals who are invited to meetings. A **Group** is the person(s) responsible for the meeting. Your Administrator sets the label for the Group field, so the name may vary (in the example below, it is labeled "Customer"). A Group can designate a **First Contact** to oversee questions, changes, and updates to the meeting (First Contacts are optional). **First Contacts** will receive notifications regarding any meeting changes.

Concept: **Attendees** = Invitees. **Group** or **First Contact** = Meeting Organizers.

To invite people to your meeting:

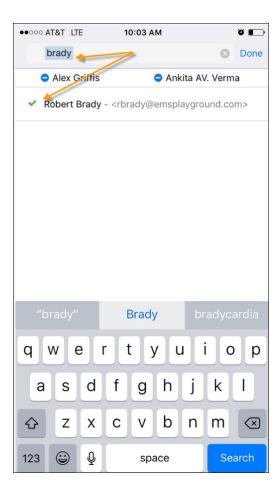
1. During the <u>Create a Meeting</u>, tap the **Attendees** field to invite people to your meeting.





2. Search for people by entering name(s) in the **Search** field and tapping the Search icon. Tap on the names in the Search Results list to add them to the event. The list the system searches from is defined by your Administrator.

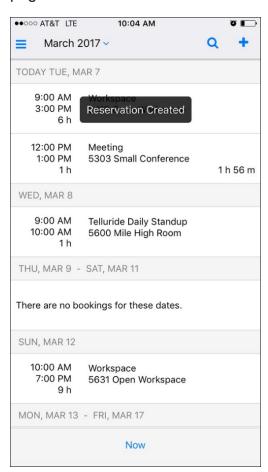




- You may be able to add multiple attendees; invitees that are already on the meeting show at the top; you can remove them by tapping the blue Remove icon. Tap Done when finished.
- 4. In the **Message** field, enter the message you wish to send about the meeting to attendees.
- 5. In the **Group** (or **Customer**) field, enter the name of the predefined group or person responsible for the meeting (on whose behalf you can book the meeting).



- In the First Contact field (optional), enter the name of the person who will be the first point of contact for the meeting; they will receive notifications and updates about the meeting if details change.
- Tap Save to complete the reservation. A message displays confirming that your reservation has been created. Your new booking will now appear on your Home page.

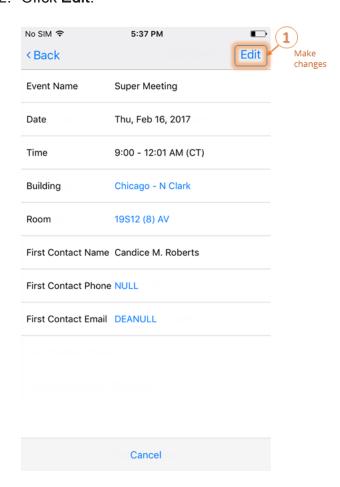




CHAPTER 17: Edit a Meeting

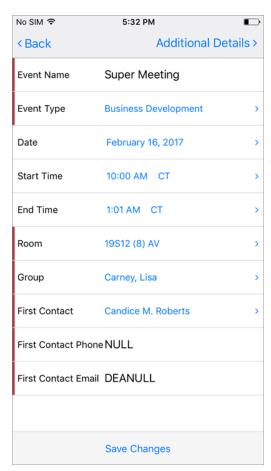
To edit a meeting:

- 1. From your Home screen, tap on the event you wish to change.
- 2. Click Edit.





3. Make your changes and tap **Additional Details** to edit billing and additional information, or just tap **Save Changes**.



See Also: Check In to Meetings and Invite People



CHAPTER 18: Skype for Business in EMS Mobile App

The EMS integration of Skype for Business in the Mobile App allows users to easily incorporate instant messaging and audio/video conferencing to their meetings without the need for A/V support. Skype for Business is currently available for the EMS Mobile App, EMS Web App, and EMS for Outlook.

Important Notes:

- Skype for Business is ONLY available on Exchange-enabled templates.
- Users cannot edit or remove Skype for Business meetings from their reservations. Users can delete the link but the Join link will remain enabled.
- For more information, see <u>Configure Skype for Business</u>.

This topic provides information about the following:

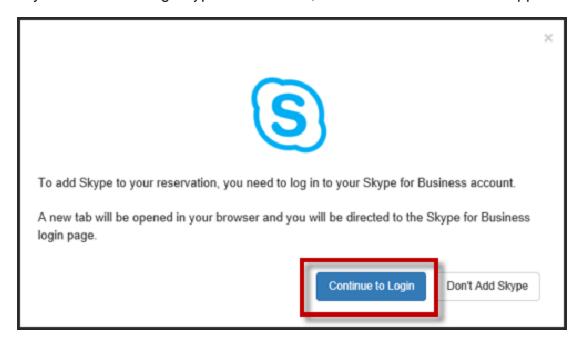
- Add Skype for Business to a Reservation
- Join a Skype for Business Meeting

ADD SKYPE FOR BUSINESS TO A RESERVATION

To add Skype for Business to a reservation in EMS Mobile App:



- 1. Sign into your EMS Mobile App.
- 2. Create a Meeting. Select a room and Invite People.
- 3. At the bottom of the screen, there is a **Create a New Skype Meeting** toggle. If this is your first time using Skype for Business, an authentication form will appear.



- If the user's Skype account is authenticated, they can continue creating their reservation.
- If the user's Skype account is not authenticated, an authentication modal will appear.
- If the user fails to authenticate their Skype account, the Skype toggle will be disabled.



Tip: Authentication to Skype is dependent upon the deployment type.

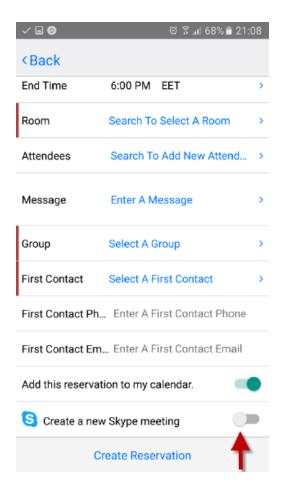
There are three deployment types for Skype for Business:

- On Premise: This deployment for Skype for Business does not retain a token and requires authentication every 8 hours. As a result, you will be asked to sign in every 8 hours.
- Online: This deployment retains the token so only an initial authentication is required.
- " Hybrid: This deployment has the same authentication method as the Online deployment.

For more information regarding authentications in Skype for Business, please click here.

 Following authentication, slide the Create a new Skype Meeting toggle to add Skype for Business to your reservation.





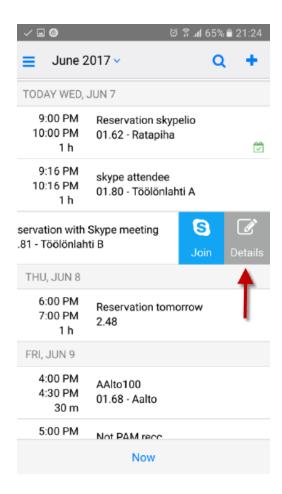
- 5. After successful authentication, you should receive a message that Skype has been successfully added to your reservation. To remove Skype from your reservation, slide the **Create a new Skype Meeting** toggle to the disabled position.
- 6. Click **Create Reservation**. Skype meeting information will appear in your meeting invitation and will be stored on the EMS database.



Important: Once you have added Skype to your reservation, the meeting attendees will receive an email notification including the Join Skype link and call-in information.

7. Meeting hosts can view reservation details—including Skype meeting information—by navigating to the **Home** page. Swipe to the left of the meeting you wish to view and click **Details**.





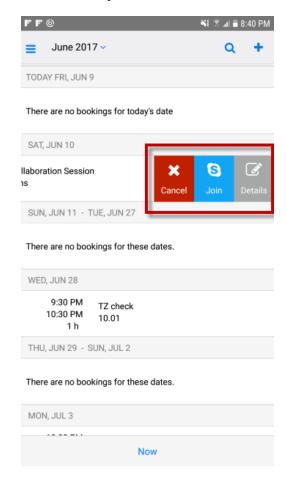
Tip: Once Skype has been added to your meeting, the Skype meeting information will appear in all EMS applications that have been integrated with Skype for Business (i.e., EMS for Outlook and EMS Web Apps).



JOIN A SKYPE FOR BUSINESS MEETING

To join a Skype for Business meeting in EMS Mobile App:

1. From the Home page, navigate to the meeting you wish to attend. Swipe left. From this drawer, you will be able to **Cancel**, **Join**, and view **Details**.



2. Click **Join** to be connected to your meeting.