EMS FOR OUTLOOK
User Guide

V44.1

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CHAPTER 1: EMS for Microsoft® Outlook Add-In
User Guide (V8)

The EMS for Microsoft Outlook add-in 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, catering, etc.—all from within Microsoft Outlook.

CHAPTER 2: Get Started with EMS for Outlook

> **IMPORTANT:** EMS for Outlook is currently only available for Windows Outlook. It is not compatible with Outlook Online or for Mac.

EMS for Outlook is an optional add-on for Microsoft® Outlook; if you have it installed, you will see the EMS for Outlook icon in the top toolbar of your Outlook application window. This tool enables you to easily use Outlook to search for available rooms throughout your EMS database and make a reservation without exiting the application. Once you begin a meeting in Microsoft® Outlook, you can access the add-in by clicking the EMS icon. You can search for room availability for a particular time on one day (a simple reservation with one booking) or on multiple days (a series reservation with multiple bookings).

> **TIP:** For video tutorials about using EMS for Outlook, see EMS for Outlook Video Tutorials.

CHAPTER 3: Microsoft Outlook, EMS for Microsoft Outlook, and EMS Web App Comparison

The EMS for Outlook add-in 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.

The EMS Web App 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 add-in as compared to Microsoft Outlook and the EMS Web App are the following:

» For complex room reservations and resource management (such as copying a reservation), the EMS Desktop Client application may be preferred.

» Simple routine reservations made using the EMS for Outlook add-in generally follow the same rules as simple Outlook reservations.

» The add-in supports existing Outlook delegation assignments; however, the everyday user accounts must have the same corresponding delegation settings.

» The add-in can be used just like Microsoft Outlook to schedule regular recurring appointments (day and time). EMS for Outlook does not support recurring appointments without an end date.

» Just like reservations created in the EMS Web App, EMS for Outlook reservations abide by the rules of the Web Process template and the EMS Web App 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.

CHAPTER 4: Create a Reservation in EMS for Microsoft Outlook

You can use the functions in the EMS for Microsoft Outlook add-in 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 section covers the following topics:

» Create a Single Reservation
» Create a Series Reservation
» Create a Video Conference Reservation
» Edit or Cancel a Reservation

CHAPTER 5: Create a Single Reservation

In EMS for Outlook, you can search for rooms that are available for a particular time on one day and create a simple reservation with one booking.

> **TIP:** This section details the creation of a single reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see [Create a Video Conference Reservation](#).

1. Open Microsoft Outlook and create a standard meeting that includes an event subject, attendees, and the date and time for the event.
2. Click the **EMS Room Manager** icon in the top menu bar of Outlook.
3. Select a template from the dropdown list (the list contains pre-defined templates set by your System Administrator).
4. The default List View will appear. This view displays the rooms available during the date and time of your event. This view shows the room's floor, building, location type and capacity.

5. Click the green **Add** symbol to add a room to your meeting.

List View Tab
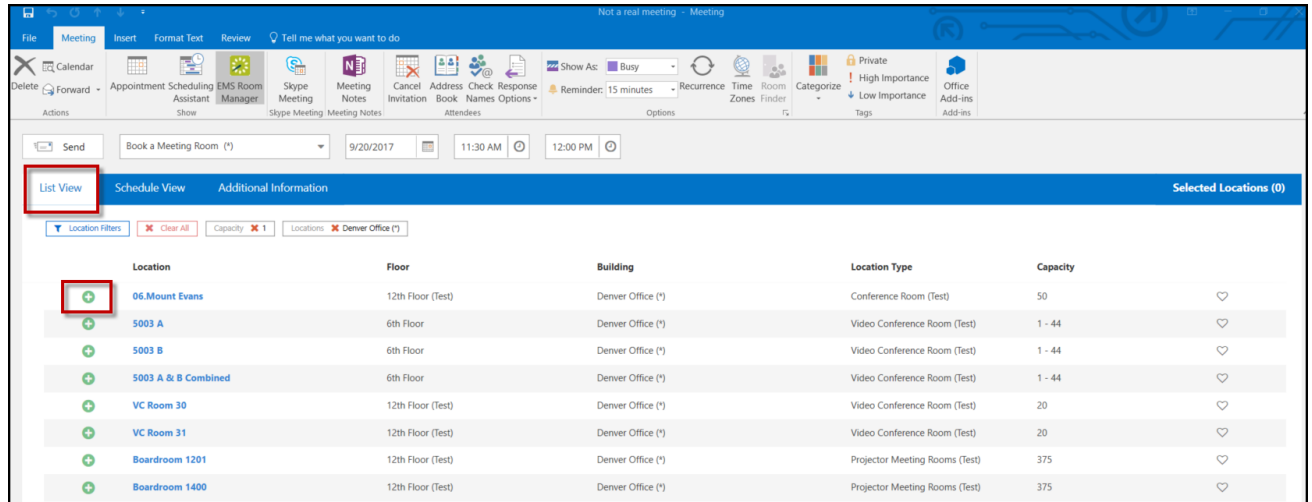
> **TIP:** You can make a room your Favorite by clicking on the heart in the right-hand column. This Favorite will transfer to all EMS access points (e.g., EMS Web App, EMS Mobile App, etc.).

6. The Schedule View displays all the rooms in the building during the event time and who has booked them. If you have chosen a room for your event, a "Booking Edit in Progress" status (green color) is displayed for the room.

7. To view your meeting's attendees in the Schedule View, click the **Show attendees in schedule** checkbox in the right-hand corner. Click **Add New Attendee** to add an

attendee to your meeting. You can make a required attendee optional by clicking on the icon next to their name.

Schedule View Tab
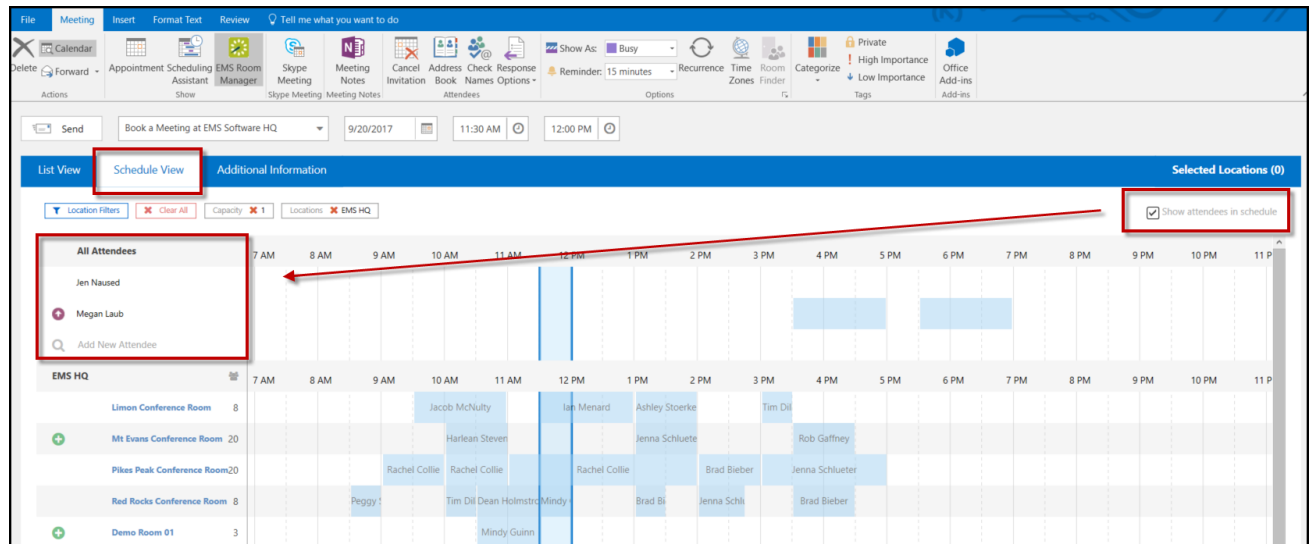
8. Optionally, you may be able to request services for the event and/or provide setup notes for the event. The **Services** tab may be available for requesting one or more services for the event, such as Catering, A/V Equipment, etc. Click on the service you want to add and provide additional information in the services dialog box.

Adding Services from the Services Tab
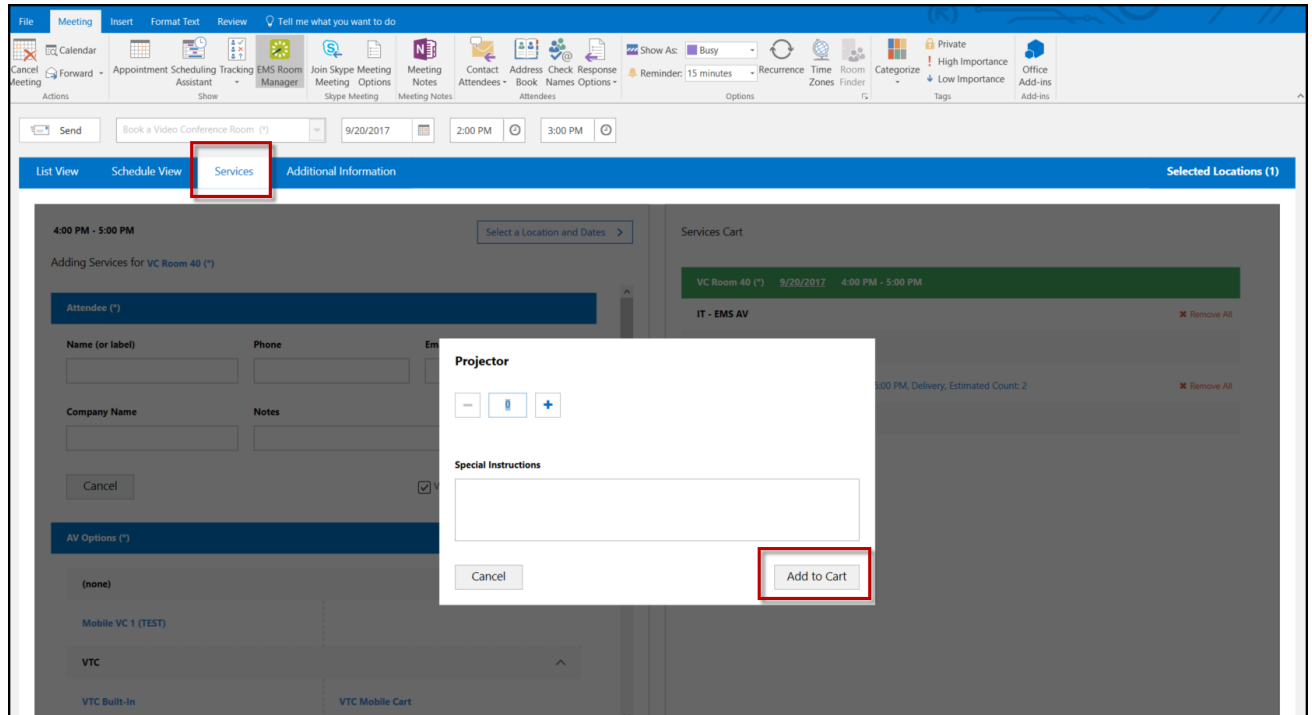
> **NOTE:** From the **SERVICES** tab, you can select services for specific locations and dates by clicking on the **SELECT A LOCATION AND DATES** at the top of the tab.

9. Click **Add to Cart** to add the service to your event.

10. Click on the **Additional Information** tab. From this tab, you can edit the Subject, Employee, and Event Type.

11. Choose an Event Type from the dropdown.

Additional Information Tab
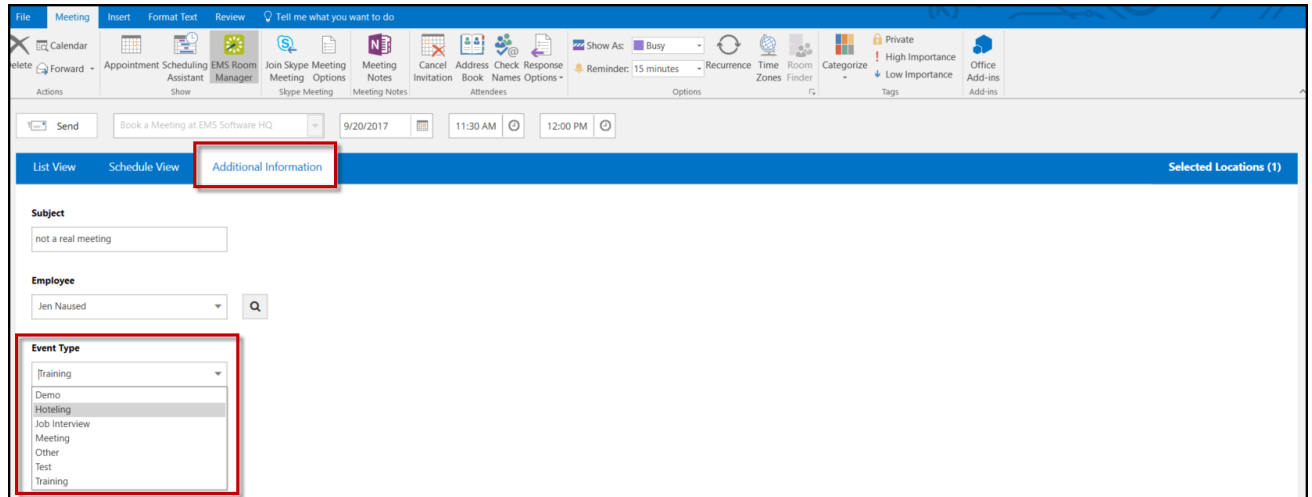
12. From the **Selected Locations** tab, you can view information about the selected room, including the Floor, the Building in which it is located, its Location Type, Capacity, and the Attendee Count for your event. If needed, you can click the red remove icon to remove the room for the scheduled event so that you can select a different room. Additionally, you can edit the reservation by clicking on the edit icon.

13. To add a Skype for Business meeting to your event, click the **Skype Meeting** icon. The Skype icon will only appear if you have the Skype for Business Add-in enabled.

14. Click **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 EMS Reservation ID is included in the body of the meeting invitation.

CHAPTER 6: Create a Series Reservation

A Series Reservation is a single reservation that includes multiple bookings. EMS for Outlook allows you to search for rooms that are available at a particular time on multiple days to create a series reservation. This section details the creation of a series reservation for a non-video conference meeting. For information about scheduling a video conference meeting, see Create a Video Conference Reservation.

TO CREATE A SERIES RESERVATION:

1. Open Microsoft Outlook and click **New Meeting** to begin your reservation. Specify the subject, attendees, date, and time.

2. Click the **Recurrence** button.

Recurrence
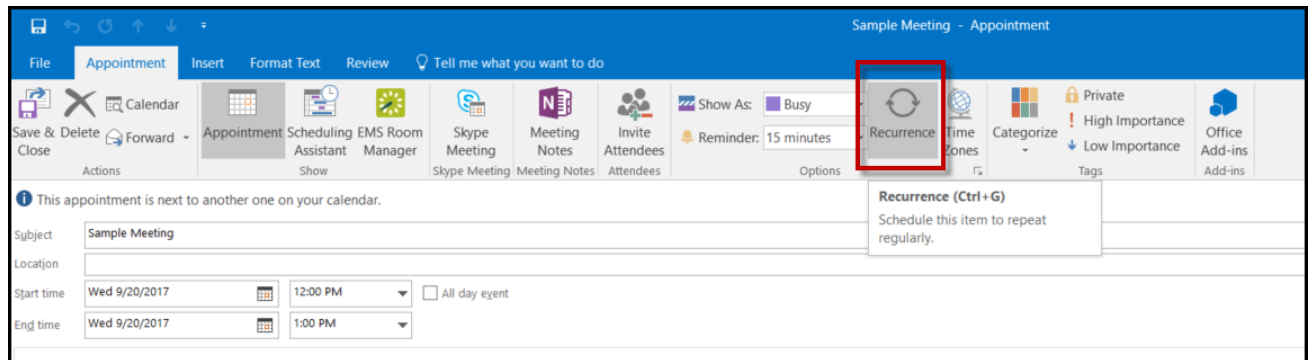
> **TIP:** The Start Time and End Time are designated when you set up the
> meeting in Outlook. You can edit these values in EMS for Outlook via
> the date and time fields or later after booking.

3. In the Appointment Recurrence dialog box, specify the Appointment Time, Recurrence pattern, Range of recurrence, and End by Date. Click OK.

> **WARNING:** Ensure you set an End Date for the recurrence. EMS for
> Outlook does not support infinite recurring meetings.

4. Click the **EMS Room Manager** icon in the top menu bar of Outlook.

5. Select a Template from the dropdown list (the list contains pre-defined templates set by your System Administrator).

6. Select a Room. By default, for a recurring meeting, EMS for Outlook opens in the List view. The List view shows the availability for all rooms. The list will include a **Days Available** column. This feature allows you to view how many days the space is available during your recurrence date range (e.g., 10/10 days). Click the **Select** (**+**) button on the left to select your room. If your room is available for all of your days, continue creating your reservation.

7. If the room you selected is not available for all days (e.g., only 8/10 days), the Resolve Conflicts dialog box will appear. (For example, for a recurrent meeting with 10 meeting dates, Demo Room 06 is available for 8 out of the 10 meeting dates.)

8. Choose a location that is available for the remaining dates during your recurrence and click the green **Select** (**+**) button.

> **IMPORTANT:** If the user does not wish to choose a room that resolves the conflict, they can skip the resolve conflicts process. Dates that are skipped will not be assigned a room and the location field in the meeting in Outlook will not be populated. The user can review the reservation at a later date and choose rooms for the skipped dates.

9. Optionally, click on the **Selected Locations** tab to view information about the selected room(s), such as Days Available, Location, Floor, Building, Location Type, Capacity, and Attendee Count. If needed, you can click the red Remove button to remove the room for the scheduled event or the Edit button to make changes.
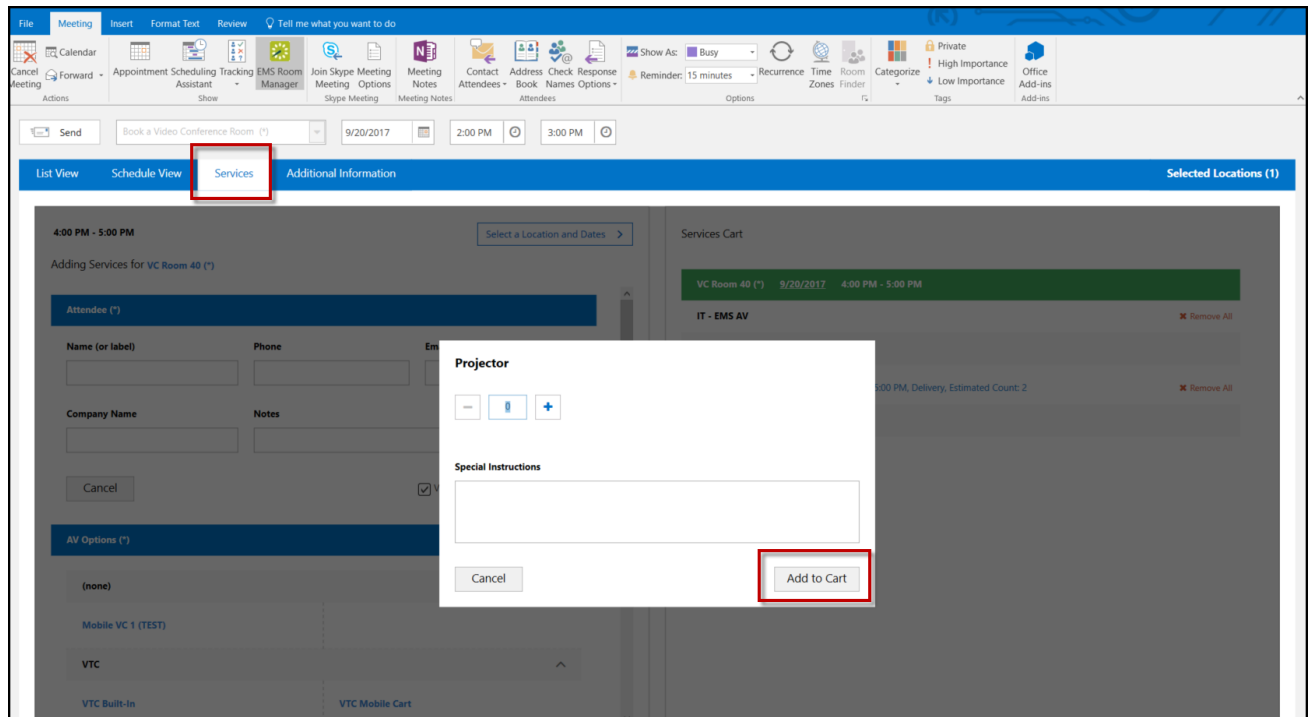
Selected Location Tab
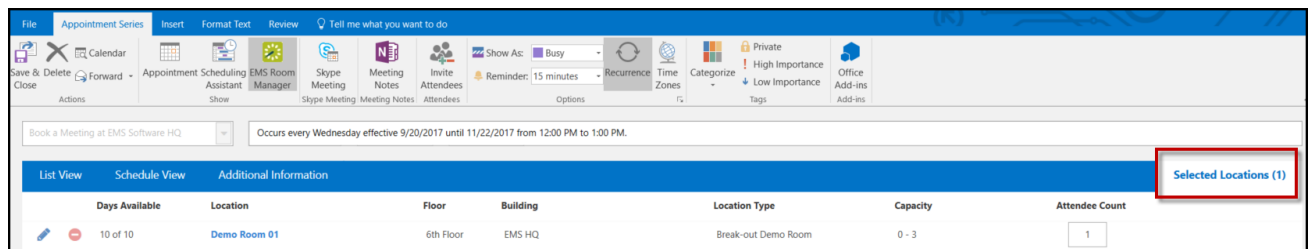
10. Optionally, you might be able to request services for the event, supply billing information for the event, and/or answer additional questions about the event. The **Services** tab may be available for requesting one or more services for the event, such as Catering, A/V Equipment, etc.

11. If your series has multiple rooms or start times, click on **Select Service Location and Dates**.

12. Click the service you want to add and provide additional information in the services dialog box if required.

13. Click **Next**.

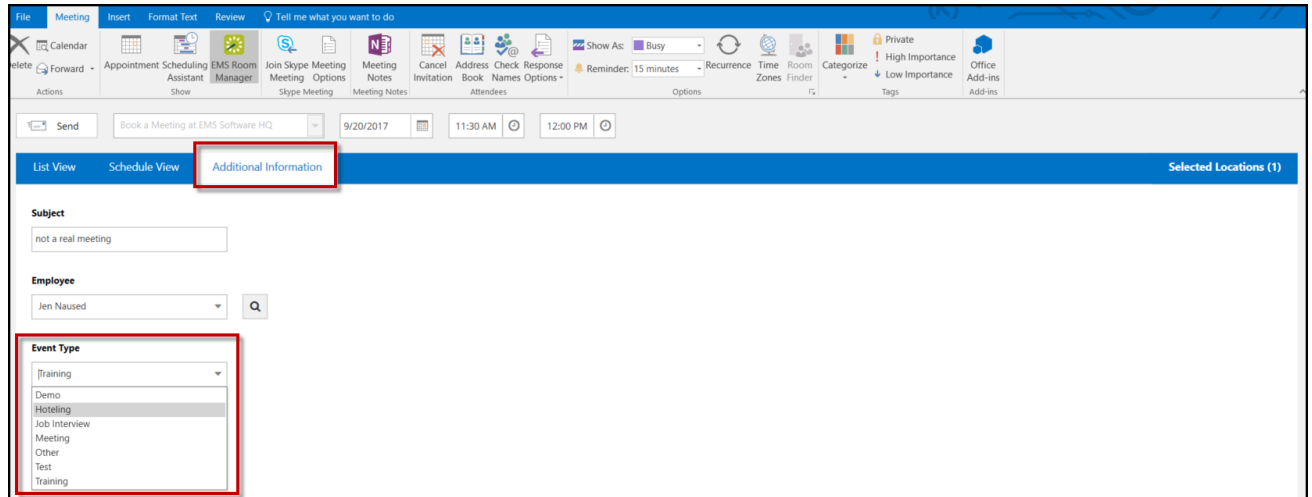14. Select quantity.

15. Click **Add to Cart**.

Services Tab

16. Click on the **Additional Information** tab. From this tab, you can edit the Subject, Employee, and Event Type.

17. Choose an Event Type from the dropdown.

Additional Information Tab

18. From the **Selected Locations** tab, you can view information about the selected room, including the Floor, the Building in which it is located, its Location Type, Capacity, and the Attendee Count for your event. If needed, you can click the red remove icon to remove the room for the scheduled event so that you can select a different room. Additionally, you can edit the reservation by clicking on the edit icon.

19. To add a Skype for Business meeting to your event, click the **Skype Meeting** icon. The Skype icon will only appear if you have the Skype for Business Add-in enabled.

20. Click **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 EMS Reservation ID is included in the body of the meeting invitation.

CHAPTER 7: Create 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:

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

TO CREATE A VIDEO CONFERENCE RESERVATION:

1. Follow the appropriate steps for creating either a Create a Single Reservation or Create a Series Reservation reservation.
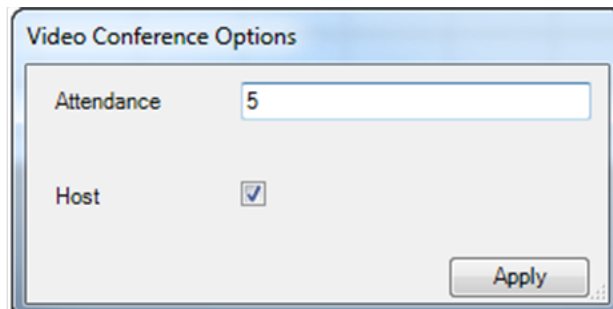
   > **TIP:** Please note the following differences for a video conference

reservation:

» A video conference reservation requires two rooms

» You must always designate the capacity for each room

» You must indicate which room is the host room

2. Add the video conference option to your reservation. The Video Conference Room dialog box will appear.

Video Conference Room Dialog Box

» If a room that you request 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 request 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 request 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 book- ing color of yellow is displayed to indicate that you have successfully booked the room.

3. After you successfully book a video conference reservation, the host room is indic- ated on the **Selected** tab.

Video Conference Room Availability Indicators
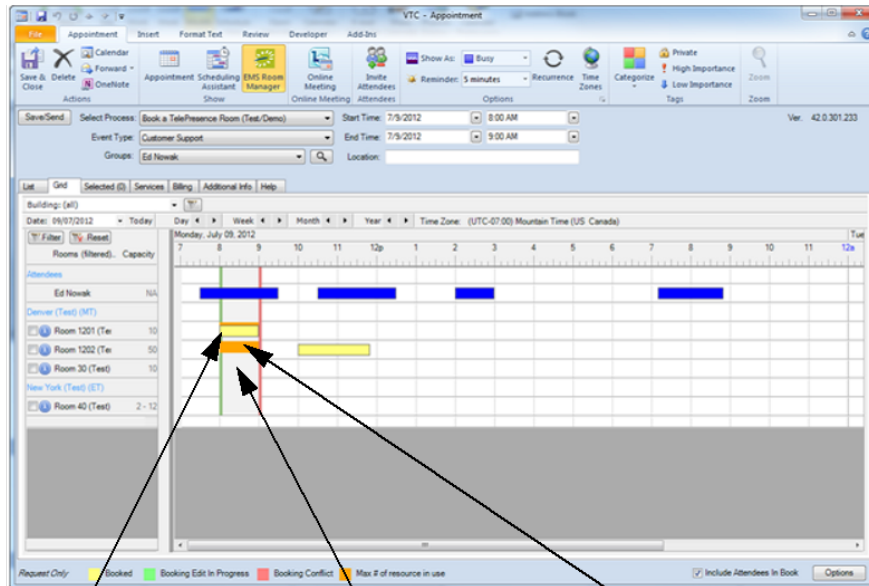
Room 1201 successfully booked with a mobile video conference cart.

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

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

Host room indicated on the Selected tab for a video conference reservation

CHAPTER 8: Edit or Cancel a Reservation

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

TO EDIT OR CANCEL A SCHEDULED EVENT

1. Open your Outlook calendar.
2. In the calendar, double-click on an event date.
   » If the reservation is a single reservation, then the meeting information opens in the standard Outlook meeting format.

3. If needed, edit the **Start Time** and/or **End Time**, and then click **EMS Room Manager**.
4. Edit any and all of the information for the scheduled event as needed (see Create a Single Reservation) or click **Cancel Meeting** to cancel the event.

> **TIP**: To cancel a scheduled service for an event, 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.
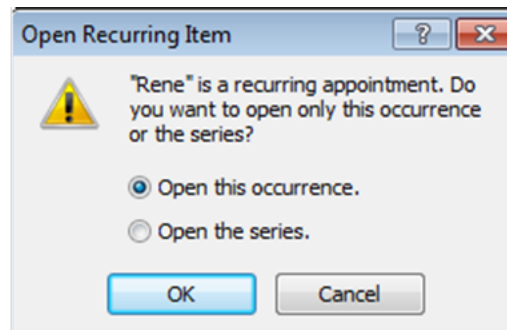
5. Do one of the following:

   a. 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**.

   b. 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**.

6. Click **EMS Room Manager**. The EMS for Outlook add-in opens in the **Selected Locations** tab. From this tab, users can edit the date, time, and location. Click on **Additional Information** or **Services** tab to make further edits if necessary.

# CHAPTER 9: Use Skype for Business in EMS for Outlook

Everyday Users can now integrate audio/video conferencing tools with EMS applications, starting with Skype for Business. It will no longer be necessary for users to simultaneously create a separate meeting to enable an audio/video conferencing component to their meetings. The EMS integration of Skype for Business allows users to easily integrate instant messaging and audio/video conferencing to their meetings without the need for A/V support. Skype for Business is **only** available for **Exchange-enabled templates**. For more information about Configuring Skype for Business, see [Configure Skype for Business](#).

> **NOTE:** Skype for Business meetings cannot be removed from Outlook appointments, including those tied to reservations using EMS for Outlook.

TO USE SKYPE FOR BUSINESS:

1. Ensure you have the Skype for Outlook add-in.
2. Open Microsoft Outlook and create a standard event request that includes the event subject, the date, and time for the event, and invite the necessary attendees.

3. Click the **EMS Room Manager** icon. Create a Reservation in EMS for Microsoft Outlook.

4. Under the **Meeting** tab, click the **Skype Meeting** button on the top menu. Skype meeting information will appear in your meeting invitation and will be stored on the EMS database.
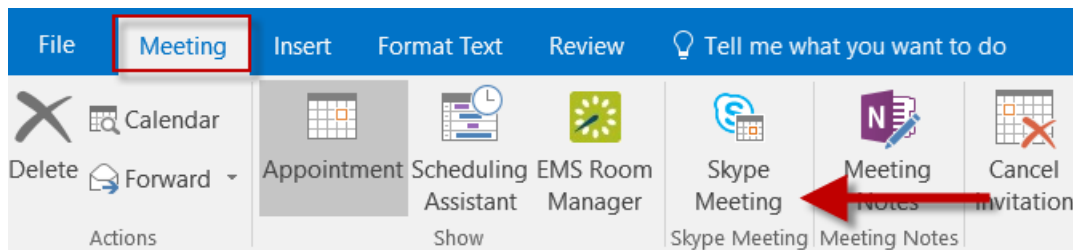
5. If this is your first time using Skype for Business, an authentication form will appear. Sign in using your Skype credentials.

» 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.

> NOTE: Authentication to Skype is dependent upon the deployment type.
>
> **THERE ARE THREE DEPLOYMENT TYPES FOR SKYPE FOR BUSINESS:**
>
> 1. **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.
> 2. **Online:** This deployment retains the token so only an initial authentication is required.
> 3. **Hybrid:** This deployment has the same authentication method as the Online deployment.
>
> For more information regarding authentications in Skype for Business, see Configure Skype for Business.

6. Complete your reservation. 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 Mobile App and EMS Web App).

For more information regarding the features of Skype for Business, please see Microsoft Skype for Business Quick Start Guides.

CHAPTER 10: Resolve Booking Conflicts

This topic provides information on the following:

» [Resolve Booking Conflicts for a Series Reservation](#)
» [Resolve Booking Conflicts When You Receive a Warning Email](#)

TO RESOLVE BOOKING CONFLICTS FOR A SERIES RESERVATION:

When booking a recurring meeting, you may encounter a booking conflict. To resolve this conflict:

1. Create your [Create a Series Reservation](#).
2. Click the **EMS Room Manager** icon to choose your room. The List View will display with a list of all available rooms that match your meeting criteria.
3. Choose a room by clicking the **Add** (**+**) button next to the Location.
4. To avoid booking conflicts, choose a room that is available for the entire span of your recurring meeting (as displayed in the **Days Available** column).

Days Available Column Indicates Potential Conflicts

5. If you choose a room that is not available for the entire time span of your recurrence, a booking conflict has been created. The Conflict Resolution dialog box will open.

6. From the Conflict Resolution dialog box, choose a room for the remaining occurrences that do not yet have locations by clicking the **Add** (**+**) button.

Conflict Resolution Dialog Box

NOTE: You can click the **SKIP IT** link at the top of the Conflict Resolution dialog box to bypass this resolution. However, you will not have space reserved for the booking, and it will not appear on your calendar. EMS Software recommends that you define an "Outlook TBD" room for each building in your database. This will ensure skipped bookings

remain in the correct timezone and will allow for localized notifications and reports to be created around meetings without locations. See Also: Configure Outlook TBD Rooms.

7. Choose an alternate room. The conflict has been resolved and will be reflected on your calendar.

TO RESOLVE BOOKING CONFLICTS WHEN YOU RECEIVE A WARNING EMAIL:

As the meeting scheduler, you may receive a booking error message (e.g., "One or more of your rooms were not available and are in conflict. Refer to your email for next steps.") and an email that indicates the bookings that are in conflict for the reservation. This email will alert you that "The following rooms could not be reserved because they are unavailable. You must reserve a new room for each time slot shown below."

1. Open your Outlook calendar and click on the **EMS Room Manager**.
2. Navigate to the date of the scheduled event and double-click the event for which a booking is in conflict.

3. If the event is recurring, 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.

4. Leave **Open this occurrence** selected, and then click **OK**.

5. Click **the EMS Outlook Manager** icon in the Outlook toolbar. The EMS for Outlook add-in opens the **Selected Rooms** tab to show you the booking conflicts.

CHAPTER 11: View Known Errors/Alerts for EMS for Outlook

During the course of using the EMS for Microsoft Outlook plugin module to schedule reservations and make appointments, you might encounter alerts and error messages.

This following table details the known alerts and error messages for the module and provides an explanation for each:

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	

ALERT/ERROR MESSAGE	DESCRIPTION
Rooms cannot be booked in the past.	Displayed if a user opens a meeting that has occurred in the past.
You must be the organizer of the meeting to make changes.	Displayed when a user attempts to open a meeting for which they are not the web user.
Bookings cannot be longer than 24 hours.	Displayed if a user sets a start/end date/time combination to anything greater than 24 hours.
Resource quantities have been reset.	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.
Updating the reservation system was unsuccessful.	Displayed when EMS encounters an unexpected error trying to save the reservation in EMS.
Bookings cannot be	Displayed when a user attempts to add a booking

ALERT/ERROR MESSAGE	DESCRIPTION
longer than {0} minutes.	that violates the Max Minutes Allowed value as specified by the Web Process template.
The terms and conditions must be accepted prior to saving the reservation.	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.)