

# VEMS User's Manual

EMS Enterprise 7.0

EMS Professional 13.0

EMS Campus 4.0

EMS Legal 7.0

EMS Workplace 7.0

EMS District 7.0





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# Preface

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Welcome to the *VEMS User's Manual*. The purpose of the *VEMS User's Manual* is to answer your questions and guide you through the procedures necessary to use the VEMS application efficiently and effectively.

## Using the manual

You will find the *VEMS User's Manual* easy to use. You can simply look up the topic that you need in the table of contents or the index. 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 *VEMS 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.



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*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 *VEMS User's Manual* uses the following conventions:

- The VEMS menu options and page options (fields, dropdown lists, toolbars, links, and available functions) are highly configurable. *All available* VEMS menu options and page options are described in detail or referenced in this User's manual. Your EMS administrator configures your organization's implementation of VEMS to best suit your organization's business needs. In addition, some options are available only if you have a VEMS account. Therefore, the options that are discussed in this User's manual might be different than what you observe for your VEMS implementation.

- 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 index.



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*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 and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

## Assumptions for the manual

The *VEMS User's Manual* assumes that:

- You are familiar with web-based applications and basic web functions and navigational elements.

## Organization of the manual

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

- [Chapter 1, “Getting Started with VEMS,” on page 9](#) details the procedures for opening and logging into VEMS as well as logging off the VEMS.
- [Chapter 2, “Browse Menu,” on page 13](#) details the options that are available on the Browse menu, including browsing for events, facilities, and/or space as well checking yourself and groups into and out of a building for an event.
- [Chapter 3, “Reservations Menu,” on page 27](#) details the different types of room requests that can be available to you on the Reservations menu and how you complete a room or services request in VEMS.
- [Chapter 4, “My Acct Menu,” on page 63](#) details the options that are available on the My Account menu, including creating a new account, modifying your user profile, setting up delegate accounts, setting default values for certain fields on the Room Request page, and creating a list of favorite rooms to search when requesting a room.

# Chapter 1

## Getting Started with VEMS

---

Virtual EMS, or VEMS, is a web-based application that allows users to browse events in a calendar, view facility information, and if allowed, submit and manage room reservations and service requests.

This chapter covers the following topics:

- [“Logging into and out of VEMS” on page 11.](#)

## Chapter 1

### Getting Started with VEMS

# Logging into and out of VEMS

You can access VEMS through any standard Internet browser.

## To log into VEMS

1. Open an Internet browser session.
2. In the browser's address field, enter the VEMS URL.



---

*Contact your EMS administrator if you need assistance.*

The VEMS Default page opens.

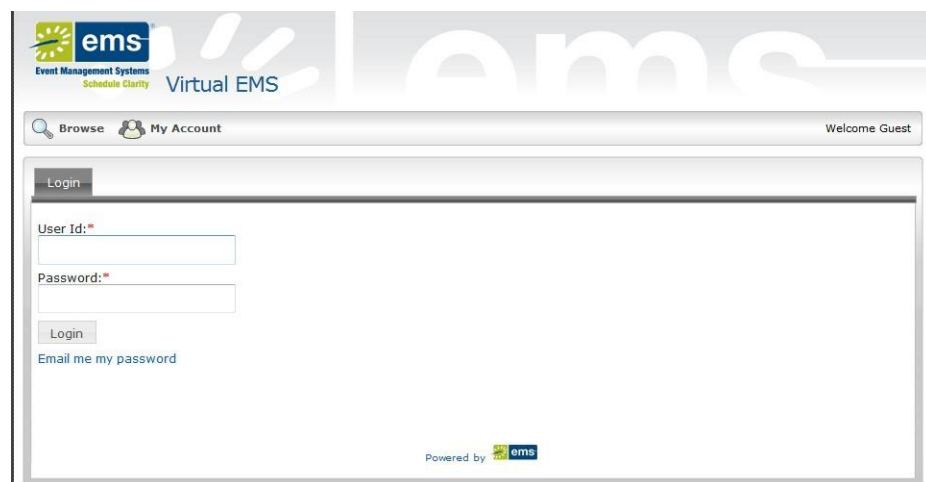
Figure 1-1: VEMS Home page



3. Under My Account, click Log In.

The VEMS Login page opens.

Figure 1-2: VEMS Login page



4. In the User ID field, enter your User ID, which is either your network email address or your network User ID.
5. In the Password field, enter your password.



---

*If you do not know your User ID, contact your EMS administrator. If you do not know your password, you can click [Email me my password](#) to have an email that contains your password automatically sent to your network email address.*

6. Click Login.

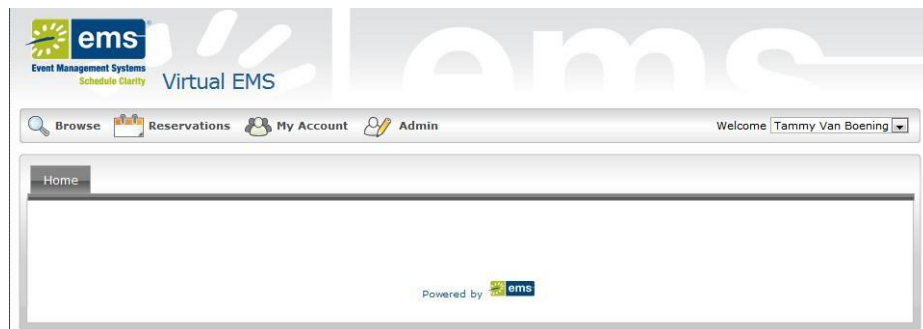
The toolbar on the VEMS Default page is updated with the following menu options—Browse, Reservations, My Account, and Admin. The My Account option is also displayed. In the upper right corner of the Default page, Welcome <User Name> is displayed. If you have been granted delegate access to other web users' accounts, then your user name is displayed in a dropdown list along with the names of these web users. You can assume the identity of any of these web users by picking the appropriate name in the dropdown list.



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*For information about creating a delegate, see [“Creating Delegate Accounts”](#) on page 69.*

Figure 1-3: VEMS Home page



## To log out of VEMS

Under My Account, click Log Out.

# Chapter 2

## Browse Menu

---

The Browse menu for VEMS always contains options for browsing for events, browsing for facilities, browsing for space, and for locating groups. In VEMS, the Browse menu also contains an option for checking in individuals/checking out individuals to/from a building.

This chapter covers the following topics:

- [“Browsing for Events” on page 15.](#)
- [“Browsing for Facilities” on page 18.](#)
- [“Browsing for Space” on page 20.](#)
- [“Locating a Group” on page 22.](#)
- [“Checking In Yourself/Checking Out Yourself from a Building \(EMS Workplace\)” on page 24.](#)

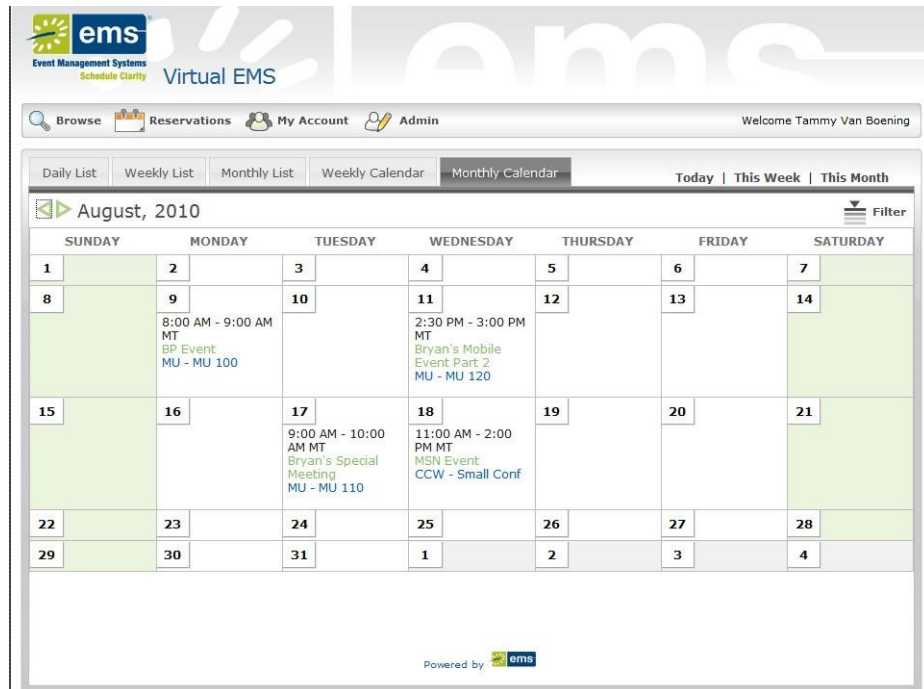
## Chapter 2

### Browse Menu

# Browsing for Events

The Browse Events page in VEMS displays your organization's EMS events in a daily, weekly, or monthly view. To open the Browse Events page, under Browse, click Browse Events.

Figure 2-1: Browse Events page, Monthly Calendar view



You can do the following on the Browse Events page:

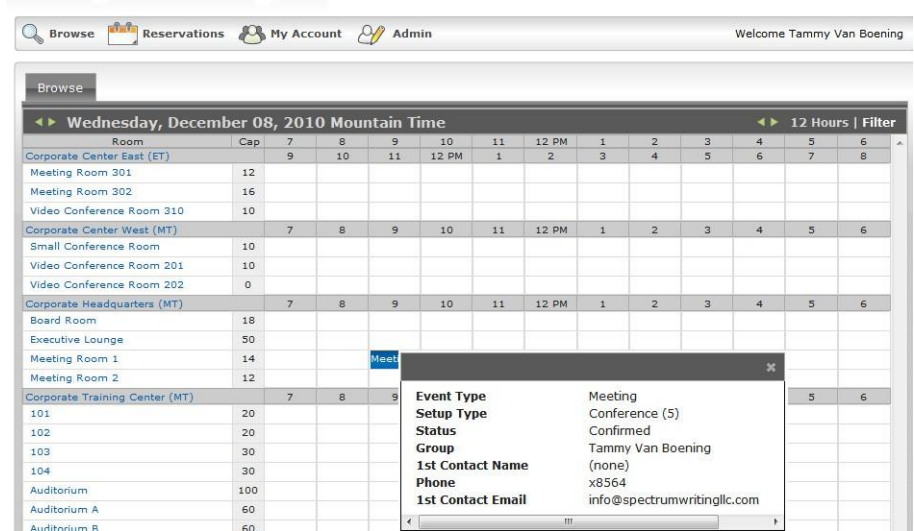
- Change the page view.

| Option           | Description                                                                                         |
|------------------|-----------------------------------------------------------------------------------------------------|
| Daily List       | Events that are scheduled for the current day's date in a list view.                                |
| Weekly List      | Events that are scheduled for the current week (weeks always begin on a Sunday) in a list view.     |
| Monthly List     | Events that are scheduled for the current month in a list view.                                     |
| Weekly Calendar  | Events that are scheduled for the current week (weeks always begin on a Sunday) in a calendar view. |
| Monthly Calendar | Events that are scheduled for the current month in a calendar view.                                 |

Chapter 2  
Browse Menu

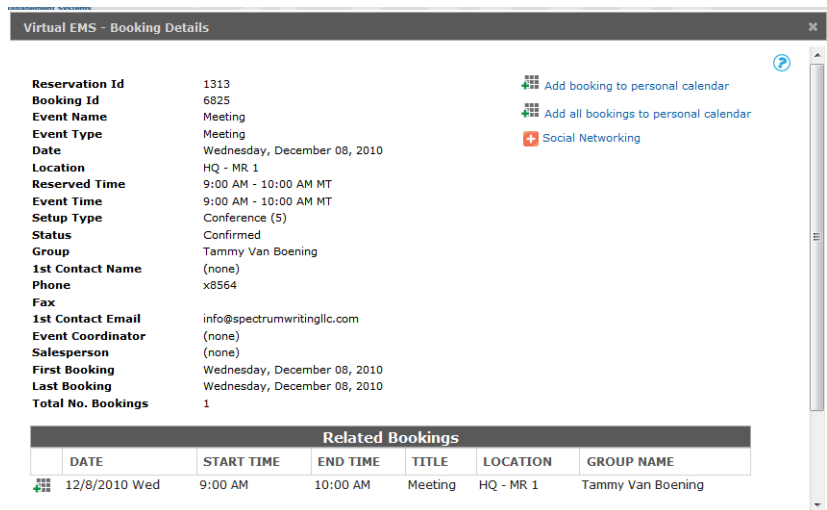
- Place your cursor over the event entry (in a Calendar view) or the event title (in a list view) to open the Event Details popup, which displays information for the event.

Figure 2-2: Event Details popup



- Click the Event Name/Title to open the Booking Details popup. The popup shows reservation details and related bookings. It also contains links for adding the selected booking to your personal calendar, adding all the bookings for the reservation to your personal calendar, and adding the booking to various social networking sites such as Facebook or Twitter.

Figure 2-3: Booking Details popup



- Click the Event Building-Room link to open a Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, availability, any user defined fields configured for the room), and any images that have been associated with the room.

Figure 2-4: Location Details popup

- Click Filter to open a Filters popup, and specify the information that is to be displayed on the Browse Events page.

Figure 2-5: Filters popup

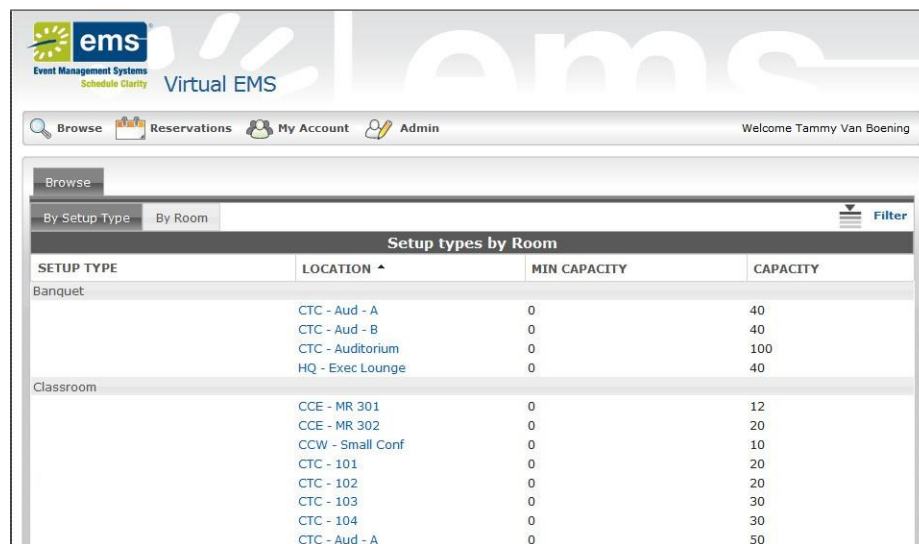


*If you select Save, and then click Apply, your filter settings are remembered the next time that you open the Browse Events page.*

## Browsing for Facilities

The Browse Facilities page displays all the rooms in your organization in which you can schedule an event. The page can display the room in one of two formats—By Setup Type, which is a list of the rooms grouped by setup type or By Room, which is a list of the setup types grouped by room. To open the Browse Facilities page, under Browse, click Browse for Facilities.

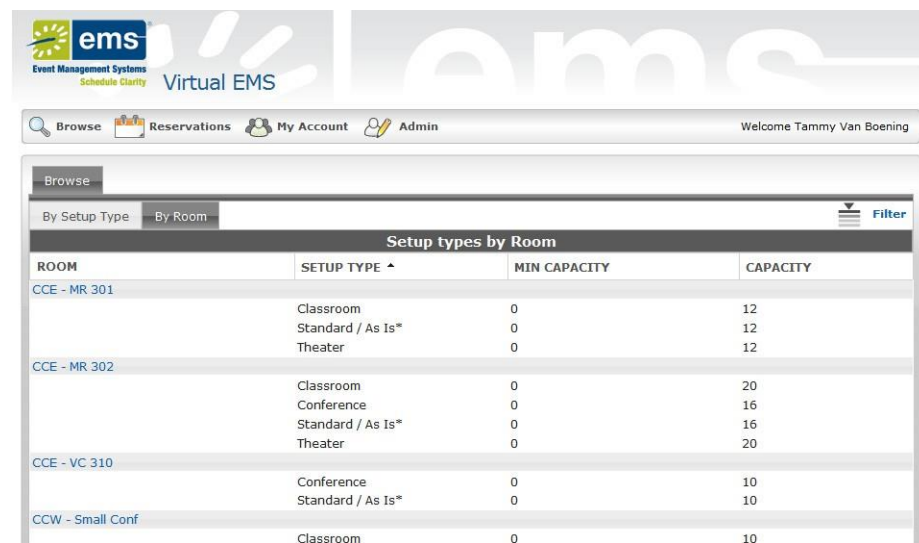
Figure 2-6: Browse Facilities page, By Setup Type



The screenshot shows the Virtual EMS interface. The top navigation bar includes the EMS logo, 'Virtual EMS' text, and links for Browse, Reservations, My Account, and Admin. A welcome message for Tammy Van Boening is on the right. The 'Browse' tab is active, and the 'By Setup Type' sub-tab is selected. The main table is titled 'Setup types by Room' and has columns for SETUP TYPE, LOCATION, MIN CAPACITY, and CAPACITY. The data is grouped by room type: Banquet and Classroom. Each room type lists specific locations with their respective minimum and maximum capacities.

| SETUP TYPE | LOCATION         | MIN CAPACITY | CAPACITY |
|------------|------------------|--------------|----------|
| Banquet    | CTC - Aud - A    | 0            | 40       |
|            | CTC - Aud - B    | 0            | 40       |
|            | CTC - Auditorium | 0            | 100      |
|            | HQ - Exec Lounge | 0            | 40       |
| Classroom  | CCE - MR 301     | 0            | 12       |
|            | CCE - MR 302     | 0            | 20       |
|            | CCW - Small Conf | 0            | 10       |
|            | CTC - 101        | 0            | 20       |
|            | CTC - 102        | 0            | 20       |
|            | CTC - 103        | 0            | 30       |
|            | CTC - 104        | 0            | 30       |
|            | CTC - Aud - A    | 0            | 50       |
|            |                  |              |          |

Figure 2-7: Browse Facilities page, By Room

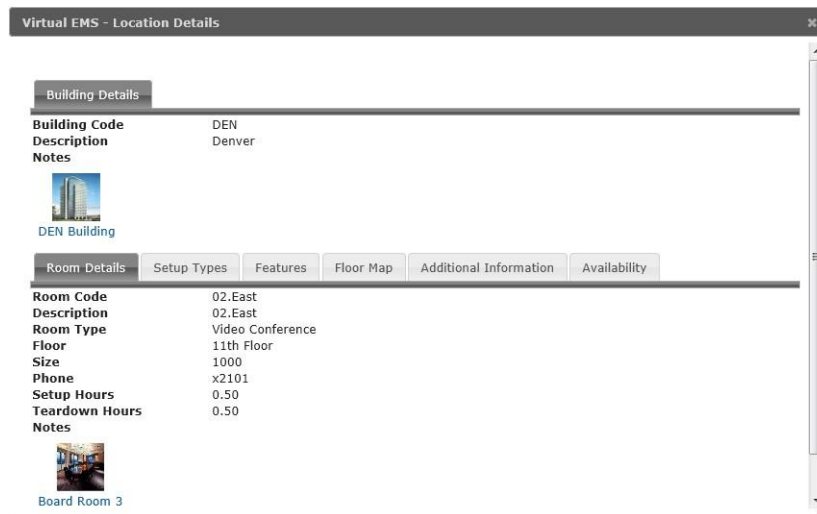


The screenshot shows the Virtual EMS interface with the 'By Room' sub-tab selected. The main table is titled 'Setup types by Room' and has columns for ROOM, SETUP TYPE, MIN CAPACITY, and CAPACITY. The data is grouped by room: CCE - MR 301, CCE - MR 302, CCE - VC 310, and CCW - Small Conf. Each room lists the available setup types and their capacities.

| ROOM             | SETUP TYPE        | MIN CAPACITY | CAPACITY |
|------------------|-------------------|--------------|----------|
| CCE - MR 301     | Classroom         | 0            | 12       |
|                  | Standard / As Is* | 0            | 12       |
|                  | Theater           | 0            | 12       |
| CCE - MR 302     | Classroom         | 0            | 20       |
|                  | Conference        | 0            | 16       |
|                  | Standard / As Is* | 0            | 16       |
|                  | Theater           | 0            | 20       |
| CCE - VC 310     | Conference        | 0            | 10       |
|                  | Standard / As Is* | 0            | 10       |
| CCW - Small Conf | Classroom         | 0            | 10       |

- In either view, you can click the Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

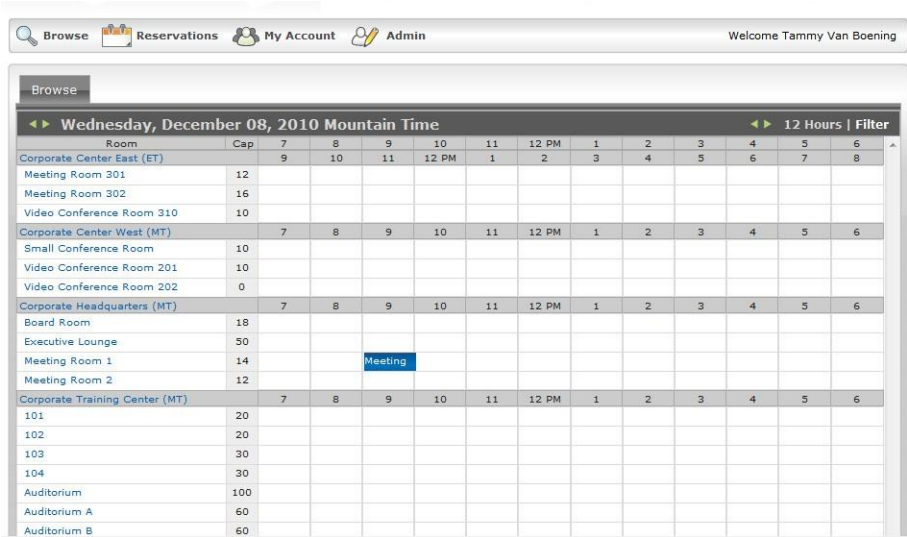
Figure 2-8: Location Details popup



# Browsing for Space

The Browse for Space page is a *read-only* page that displays all the rooms in your organization in which you can schedule an event along with the availability information for each room (based on the current day’s date) in a grid view. To open the Browse Space page, under Browse, click Browse for Space.

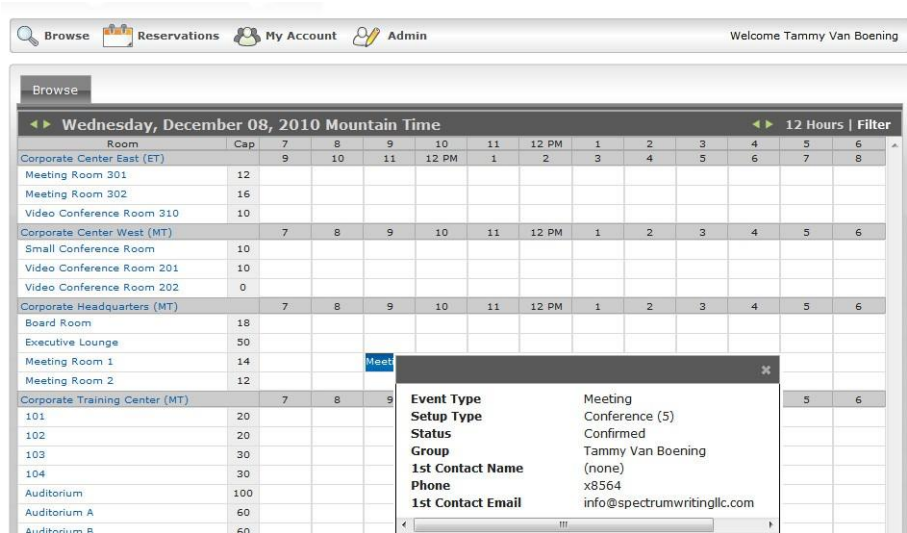
Figure 2-9: Browse for Space page



You can do the following on the Browse for Space page:

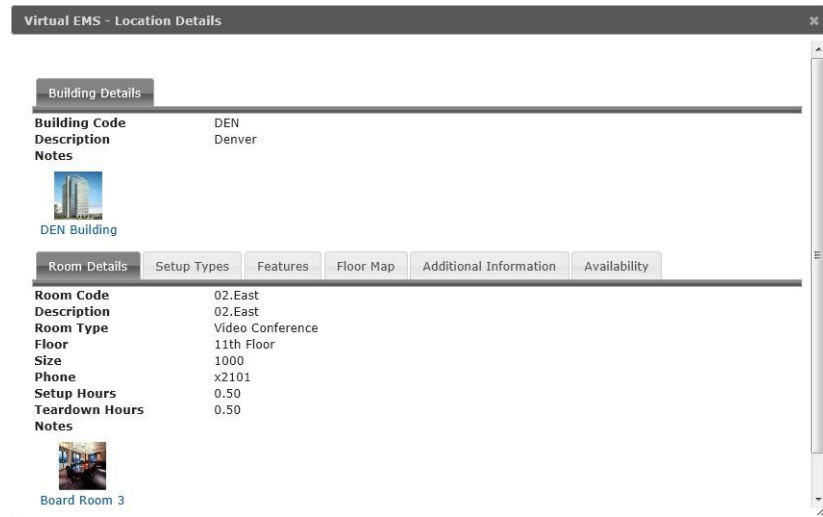
- Place your cursor over an event entry to open the Event Details popup, which displays information for the event.

Figure 2-10: Event Details popup



- Click the Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

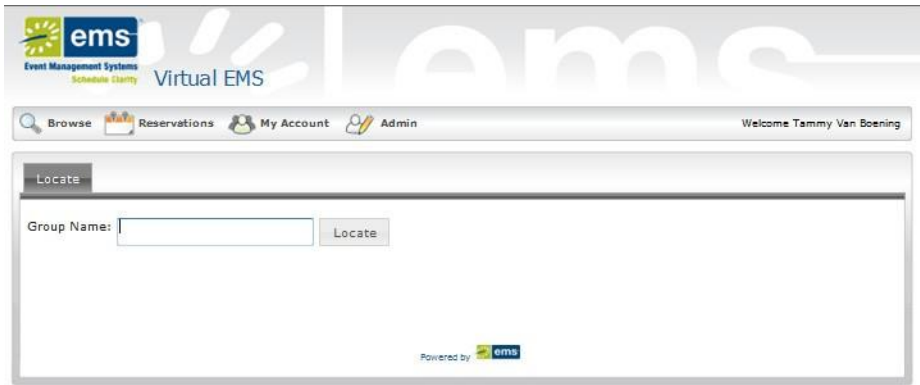
Figure 2-11: Location Details popup



# Locating a Group

You use the functions on the Locate page to locate a group as well as all the events for the current day's date for which the group is scheduled. In EMS Workplace, the check in/check out status for a group is also displayed on this page. If the group that is displayed on the page is *you*, then you can use the functions that are available to check yourself into or out of a building for an event. In addition, if your organization has purchased and installed the optional Floor Plan Module, then a Floor Plan icon  might be displayed for a building. You can click this icon to open a floor plan for the selected building and view the location of the event's room on the plan. To open the Locate Group page, under Browse, click Locate Group.

Figure 2-12: Locate page



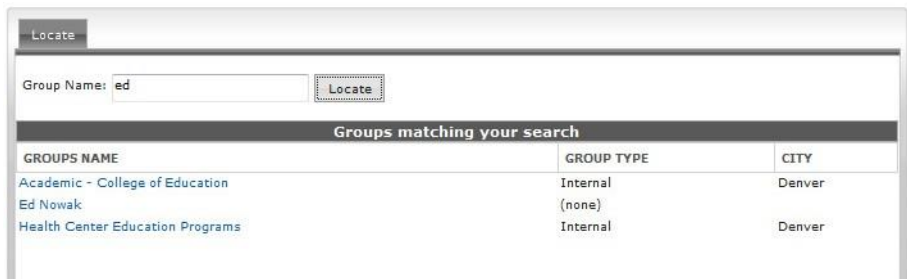
You can do the following on the Locate page:

- To locate *all* groups that have events scheduled for the current day's date, leave the Group Name field blank, and then click Locate.
- To search for a specific group, enter a search string in the Group Name field, and then click Locate. A list of all groups that meet your search criteria is displayed on the page.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **Ed** returns the College of **E**ducation, **E**d Nowak, and so on.*

Figure 2-13: Locate page with search results



- To view the bookings with the current day's date for which the group is scheduled, click the name of the group in the search results. The Locate page is refreshed with a list of the applicable bookings.

Figure 2-14: Bookings for a selected group

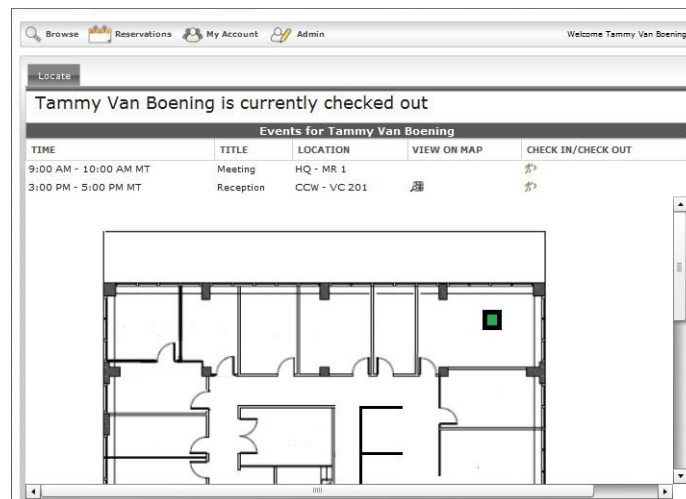


- Click the Floor Plan icon for an event to open to open the floor plan for the event's building and view the location of the event's room on the plan.



*Remember, this icon is displayed only if your organization has purchased and installed the optional Floor Plan Module.*

Figure 2-15: Viewing the floor plan for an event's building



- In EMS Workplace, if the group that you located is you, then you can do one or both of the following:
  - Click the Check In icon for an event to check the group into the event building.
  - Click the Check Out icon for an event to check the group out of the event building.

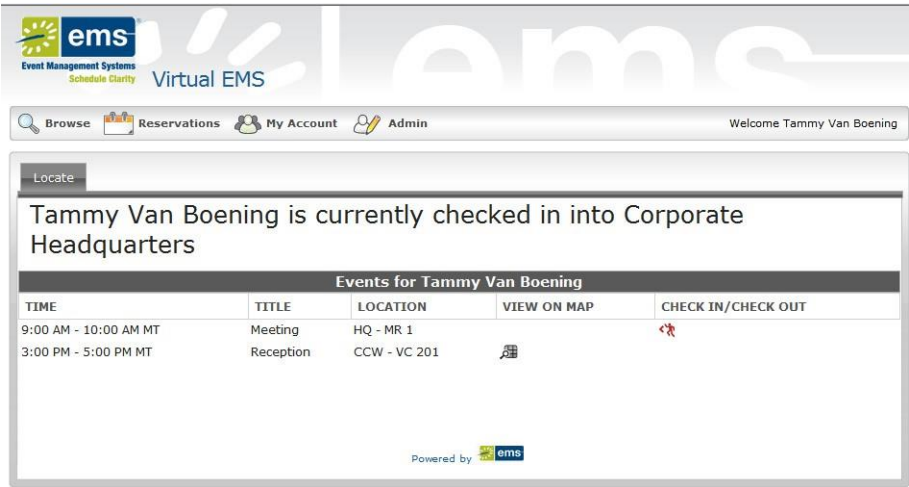
# Checking In Yourself/Checking Out Yourself from a Building (EMS Workplace)

The Check In/Check Out page, or Locate page, displays a list of all *your* bookings for the current day's date and it also indicates your check in status—are you not yet checked into a specific building (for an event), are you currently checked into a building, or have you checked out from a building. You can use the options that are available on this page to check yourself into or out of a selected building. In addition, if your organization has purchased and installed the optional Floor Plan Module, then a Floor Plan icon  might be displayed for a building. You can click this icon to open a floor plan for the selected building and view the location of the event's room on the plan. To open the Check In/Check Out page, under Browse, click Check In/Check Out.



*The Check In/Check Out option is available on the Browse menu only if your organization has purchased and installed EMS Workplace.*

Figure 2-16: Check In/Check Out page



You can do the following on the Check In/Check Out page:

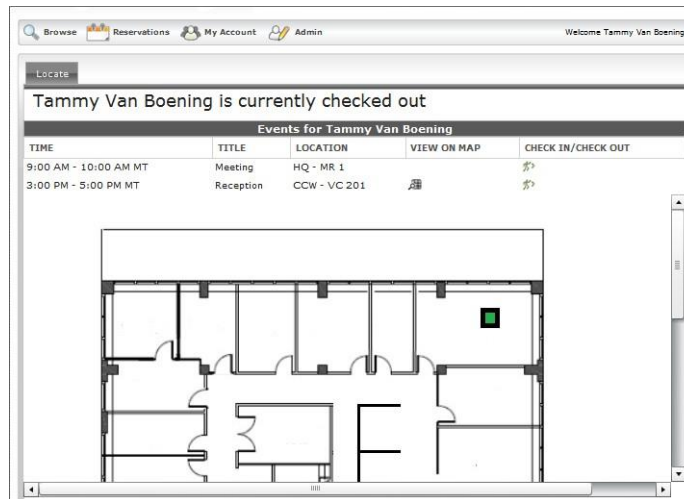
- Click the Check In icon  for an event to check yourself into the building.
- Click the Check Out icon  for an event to check yourself out of the building.

- Click the Floor Plan icon  for an event to open the floor plan for the event's building and view the location of the event's room on the plan.



*Remember, this icon is displayed only if your organization has purchased and installed the optional Floor Plan Module.*

Figure 2-17: Viewing the floor plan for an event's building





# Chapter 3

## Reservations Menu

---

The Reservations menu for VEMS contains various options for requesting a space for an event.

This chapter covers the following topics:

- [“Overview of the Reservations Menu” on page 29.](#)
- [“Submitting a Request for a Space - Booking a Room” on page 30.](#)
- [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module” on page 36.](#)
- [“Submitting a Request for Space - An Online Request for a Room” on page 44.](#)
- [“Requesting Services Only” on page 49.](#)
- [“Viewing your Requests” on page 52.](#)
- [“The Reservation Summary Page” on page 53.](#)

## Chapter 3

### Reservations Menu

# Overview of the Reservations Menu

The Reservations menu contains various options for requesting a space and/or services for an event. Three different types of requests are possible:

- A standard “self-serve” room request that shows real-time room availability in a list or grid view. Based on the rights that your EMS administrator has assigned to your account, you can either reserve rooms and services without approval required or you can request rooms and services with approval required.



*An Exchange/Lotus Notes integration option might be available that allows you to add attendees and view their free/busy information during the room request process. In addition, after you submit your reservation, the meeting is added automatically to your calendar and invitations are sent to your attendees. See [“Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module” on page 36](#)*



*Video conferencing options might also be available.*

- A simple online request form that you use to submit a request for a room and services. An EMS reservation coordinator must review requests to confirm actual availability.
- A request to provide services only to a location that is not managed in EMS, for example, an office or off-site location.

Your EMS administrator configures all these request types “behind the scenes,” and the type is not explicitly displayed on the Reservations menu. Instead, it is reflected in the tabs, fields, and functions that are available on the Room Request page, which is the page that opens after you select one of these requests. In addition, the Reservations menu contains an option—View My Requests—for viewing all the requests for space and/or services that you have submitted.

## Submitting a Request for a Space - Booking a Room

The Room Request page is organized into various sections to facilitate the [reservation process](#)—a When and Where pane (the left pane of the window) and two tabs—a Location tab and a Details tab.

Figure 3-1: Room Request page, Location tab

The screenshot displays the 'Room Request' interface. At the top, a navigation bar includes links for 'Browse', 'Reservations', 'My Account', 'Admin', and 'Help', along with a user greeting 'Welcome Tammy Van Boening'. The main section is titled 'Book a Meeting Room' and has two tabs: 'Location' and 'Details'. The 'Location' tab is active, showing a 'Selected Locations' area with the text 'No rooms currently selected' and buttons for 'List', 'Grid', and 'Floor Map'. On the left, the 'When and Where' pane contains several input fields: 'Date' (3/20/2012 Tue), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Areas' (all), 'Facilities' (New York), 'Time zone' (Eastern Time), 'Setup Information' (Attendance: 0, Setup Type: Conference), and 'Availability Filters' (Room Type: all, Floor: all, Features: Data Projector/Screen, Polycom). A 'Find Space' button is located at the bottom of this pane. The footer of the page states 'Powered by ems'.

You enter the information to search for available rooms in the When and Where pane and you view the results of the search on the Location tab. You enter information for the event on the Details tab.

## To submit a request for space - booking a room

1. Under Reservations, click a reservation option.

The Room Request page opens.



---

*Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, "group" might have been relabeled to "client," "employee," or "department," event might have been relabeled "Meeting," and so on. Required fields are marked with a red asterisk (\*).*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



---

*Depending on how your EMS administrator has configured your organization's, Room Request template, you might see different fields, or you might not see some of these fields displayed at all.*

- Enter your date and time criteria.
- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



---

*Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.*

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
- Select a time zone.



---

*Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.*

- If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.
3. In the Setup Information section, enter your attendance and setup type.
  4. The Availability Filters section provides options for filtering your room results by Room Type, Floor, and/or Features. (You can click the arrow to expand/collapse this section). If needed, enter additional filter criteria.

5. Click Find Space.

A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the List sub-tab (in a list view), on the Grid sub-tab (in a grid view), and if available, on a Floor Map view. In the List view, rooms that you can reserve are displayed under a “Reserve” heading. Rooms that you can request are displayed under a “Request” heading.



*It might be possible to specify the default values for some of these options, including the default view (List or Grid) for the search results. See [“Setting Default Values for Room Requests”](#) on page 70.*



*A room that you can “reserve” is automatically booked for the event and no approval is required. A room that you can “request” must be approved by an EMS reservation coordinator.*



*An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms”](#) on page 72.*

Figure 3-2: Room Request page, List view

The screenshot shows the EMS Room Request page. The left sidebar contains search filters under 'When and Where', 'Setup Information', and 'Availability Filters'. The main area shows a table of available rooms under the 'List' tab.

**When and Where**

Date: 3/22/2012 Thu Recurrence  
 Start Time: 8:00 AM End Time: 10:00 AM  
 Areas: (all)  
 Facilities: Denver  
 Time zone: Mountain Time

**Setup Information**

Attendance: 10  
 Setup Type: (no preference)

**Availability Filters**

Room Type: (all)  
 Floor: (all)  
 Features:  
☐ Data Projector/Screen  
☐ Polycom

**Find Space**

**Selected Locations**

No rooms currently selected

**Availability**

| SELECT                              | AVAILABLE | LOCATION         | TIME ZONE | CAPACITY | PRICE  |
|-------------------------------------|-----------|------------------|-----------|----------|--------|
| Request                             |           |                  |           |          |        |
| <input checked="" type="checkbox"/> | 1/1       | Denver - 02.West | MT        | 16       |        |
| <input checked="" type="checkbox"/> | 1/1       | Denver - 02.East | MT        | 10       | 100.00 |

6. Do one of the following to select a room:

- Click the Add icon  next to the room in either the list or grid view.
- Click the Available Room icon for the room in the Floor Map view, and then click Reserve in the Room Details message that opens.



*If you are scheduling a video conference, you might be required to specify a host location. If this option is available when you add a room to the booking, the room is automatically selected as the video conferencing host. After you add all the needed rooms, you can select the appropriate room to be the video conferencing host. You can select only one room per building. You might also have the option of specifying the setup count for each room.*



*Depending on how your EMS administrator has configured the room, an alert might open when you select the room. After you read the alert, click OK to close the alert and continue with room selection.*

The following results are possible:

- If you select a location that is available for all the event dates, then the selected location is displayed at the top of the Location tab. Continue to [Step 7](#).

Figure 3-3: Selected room displayed on Location tab

Location

Details

Selected Locations

|  | DATE          | HOLIDAYS | START ^ | END      | LOCATION         | STATUS  | SETUP COUNT | CONFLICT |
|-------------------------------------------------------------------------------------|---------------|----------|---------|----------|------------------|---------|-------------|----------|
|  | 7/3/2012 Tue  |          | 8:00 AM | 10:00 AM | Denver - 02.West | Request | 10          |          |
|  | 7/10/2012 Tue |          | 8:00 AM | 10:00 AM | Denver - 02.West | Request | 10          |          |
|  | 7/17/2012 Tue |          | 8:00 AM | 10:00 AM | Denver - 02.West | Request | 10          |          |
|  | 7/24/2012 Tue |          | 8:00 AM | 10:00 AM | Denver - 02.West | Request | 10          |          |
|  | 7/31/2012 Tue |          | 8:00 AM | 10:00 AM | Denver - 02.West | Request | 10          |          |

List

Grid

Floor Map

- If you select a location that is not available for all the event dates, then a message opens indicating this. Click OK to close the message and return to the Location tab. The selected location is displayed at the top of the Location tab and an option to search remaining dates is displayed at the bottom of the When and Where pane. Use this option as needed to fulfill all the event dates, and then continue to [Step 7](#).

Figure 3-4: Option to search for additional rooms

Availability Filters

Room Type:

(all)

Floor:

(all)

Features:

☐ Data Projector
 ☐ Polycom

Find Space

Search Remaining Dates

7. Optionally, do one or both of the following; otherwise, continue to [Step 8](#).
  - Click the name of any room that you selected for the event to open the Location Details popup, and then open the Availability tab on this popup to view the room's availability in either a Daily or Weekly view.
  - In the Availability grid, click and hold the left mouse button, drag the mouse to schedule the room for another date and time on a selected day, and then release the mouse button to select the room.

---

*You can schedule only one day at a time on the Availability tab. You cannot multi-select days. As you drag the mouse, the cursor changes to a double-headed arrow and a blue vertical bar is displayed.*



8. Click the option that indicates you have read and agree to the Terms and Conditions for reserving the room, and then click Continue.

The Details tab opens. You use the options on this page to enter the event details.

Figure 3-5: Room Request page, Details tab

The screenshot shows the 'Room Request page, Details tab' in the EMS (Event Management System) interface. The page is organized into several sections:

- When and Where:** Includes fields for 'Occurs every Tuesday week(s) effective 7/2/2012 until 7/31/2012 from 8:00 AM to 10:00 AM', 'Recurrence', 'Areas', 'Facilities', 'Time zone', and 'Mountain Time'.
- Meeting Details:** Includes 'Meeting Name', 'Meeting Type', and 'Group Details'.
- Group Details:** Includes 'Group', '1st Contact', '2nd Contact', 'Phone', and 'Fax'.
- Setup Information:** Includes 'Attendance', 'Setup Type', and 'Availability Filters'.
- Attachments:** Includes an 'Attach File' button.
- Other Information:** Includes a section for 'Would you like someone from Meeting Services to assist you with this meeting/event?'.
- Catering Terms and Conditions:** Includes 'Start Time', 'End Time', 'Service Type', 'Estimated Count', and a list of catering options (Breakfast, Hot Breakfast, From the Bakery, Beverage, Center of the Plate Salads, Stack & Wrapped Selections, Plated Affairs, Party Trays).
- Multimedia & Equipment:** Includes a section for 'Multimedia & Equipment'.
- Setup Notes:** Includes a text area for 'Setup Notes'.
- Billing Information:** Includes a 'Cost Center Number' field.

At the bottom of the page, there is a checkbox for 'I have read and agree to the terms and conditions' and a 'Submit Reservation' button.

9. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (\*). At minimum, you must enter the event name, the event type, and the group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.
- You might have the option of attaching files to the room request. If so, then an Attachments section is displayed on the Details tab. The allowed file attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.
- You might have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.



---

*Depending on how your EMS administrator has configured the service, an alert might open when you select the service. After you read the alert, click OK to close the alert and continue with adding the event details.*

- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

10. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 53](#).



---

*Depending on how your EMS administrator has configured your EMS implementation, when the Reservation Summary page opens after you submit a reservation request, a Reservation Summary email might be automatically generated and sent to you.*

## Submitting a Request for a Space - Booking a Room with the Plan A Meeting Module

The optional Plan a Meeting (PAM) module integrates VEMS application with your email system (Microsoft Exchange or Lotus Notes). If PAM is available, then you can find available rooms and add attendees for a meeting. Moreover, invitations are automatically sent to the attendees when you submit the reservation in VEMS. The Room Request page is organized into various sections to facilitate the [reservation process](#)—a When and Where pane (the left pane of the window) and two tabs—a Location tab and a Details tab.

Figure 3-6: Room Request page, Location tab

The screenshot displays the VEMS Room Request page, Location tab. The interface is divided into several sections:

- When and Where:** Contains fields for 'Add to Calendar/Send Invitations', 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Eastern Time), 'Areas' ((all)), and 'Facilities' ((all)).
- Setup Information:** Includes 'Attendance' (5), 'Setup Type' (Conference), and a 'Find Space' button.
- Find Attendee:** A search field with 'mike' entered.
- Availability Filters:** Includes 'Room Type' ((all)), 'Floor' ((all)), and 'Features' (Data Projector, Polycom, VC Equipment).
- Selected Locations:** A calendar view for Wednesday, December 15, 2010, showing a 16-hour timeline. A table below the calendar lists attendees: Mike O'Shea (Lead Specialist) and Mike Wimet (Programmer).

A 'Continue' button is located at the bottom right of the page.

You enter the information to search for available rooms and attendees in the When and Where pane and you view the results of the search on the Location tab. You enter information for the event on the Details tab.

## To submit a request for space - booking a room with the PAM module

1. Under Reservations, click a reservation option.

The Room Request page opens.



---

*Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department,” event might have been relabeled “Meeting,” and so on. Required fields are marked with a red asterisk (\*).*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



---

*Depending on how your EMS administrator has configured your organization's, Room Request with PAM template, you might see different fields displayed, or you might not see some of these fields displayed at all.*

- Enter your date and time criteria.
- Select a time zone.



---

*Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.*

- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



---

*Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.*

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
- If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.

3. In the Setup Information section, enter your attendance and setup type.

- The Availability Filters section provides options for filtering your room results by Room Type, Floor, and/or Features. (You can click the arrow to expand/collapse this section). If needed, enter additional filter criteria.



An option might be available to specify default values for one or more of these options in any section in this pane. See [“Setting Default Values for Room Requests” on page 70.](#)

- Click Find Space.

A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the List sub-tab (in a list view), on the Grid sub-tab (in a grid view), and if available, on a Floor Map view. In the List view, rooms that you can reserve are displayed under a “Reserve” heading. Rooms that you can request are displayed under a “Request” heading.



A room that you can “reserve” is automatically booked for the event and no approval is required. A room that you can “request” must be approved by an EMS reservation coordinator.



An option might be available to create a list of favorite rooms from which to make a selection. This list of favorites is displayed in the Facilities dropdown list on the Room Request page. See [“Creating a List of Favorite Rooms” on page 72.](#)

Figure 3-7: Room Request page, List view of search results

The screenshot shows the 'Book a Meeting Room' interface. On the left, there are sections for 'When and Where' (Date, Start/End Time, Areas, Facilities, Time zone), 'Setup Information' (Attendance, Setup Type), and 'Availability Filters' (Room Type, Floor, Features). The 'Find Space' button is at the bottom. On the right, the 'Selected Locations' section shows 'No rooms currently selected'. Below it, the 'Availability' table is displayed with columns: SELECT, AVAILABLE, LOCATION, TIME ZONE, CAPACITY, and PRICE. The table lists two rooms under the 'Request' heading.

| SELECT                              | AVAILABLE | LOCATION         | TIME ZONE | CAPACITY | PRICE  |
|-------------------------------------|-----------|------------------|-----------|----------|--------|
| <input checked="" type="checkbox"/> | 1/1       | Denver - 02.West | MT        | 16       |        |
| <input checked="" type="checkbox"/> | 1/1       | Denver - 02.East | MT        | 10       | 100.00 |

6. Optionally, do one or both of the following; otherwise, continue to [Step 7](#).
  - Click the name of any room that you selected for the event to open the Location Details popup, and then open the Availability tab on this popup to view the room's availability in either a Daily or Weekly view.
  - In the Availability grid, click and hold the left mouse button, drag the mouse to schedule the room for another date and time on a selected day, and then release the mouse button to select the room.

---

*You can schedule only one day at a time on the Availability tab. You cannot multi-select days. As you drag the mouse, the cursor changes to a double-headed arrow and a blue vertical bar is displayed.*



7. In the Find Attendee field, enter a search string, and then click the Search icon .

All the users and distribution groups in your global address list and personal contact list with names that meet the search criteria are displayed on the Location tab. At the top of the tab, the real-time free/busy schedules for all the attendees (including yours) are displayed.



---

*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns **Ed** Smith, **Ted** Wilson, and so on.*



---

*Click a distribution group name to explode the group into its individual members.*

8. Click the Add icon  next to each attendee whom you are inviting to the meeting.

9. Click Find Space.

A combination of the invited attendees' free/busy schedule (as pulled directly from the attendees' email system) and room information that meets the room search criteria is displayed.

Figure 3-8: Room Request page, Grid view of search results

The screenshot displays the EMS Room Request page. The top navigation bar includes 'Browse', 'Reservations', 'My Account', and 'Admin', with a 'Welcome Ed Nowak' message. The main section is titled 'Book a Meeting Room' and is divided into two tabs: 'Location' and 'Details'. The 'Location' tab is active, showing a 'Selected Locations' section with a calendar view for 'Wednesday, December 15, 2010 Mountain Standard Time'. The calendar shows a grid of hours from 7 AM to 10 PM. Attendees listed are 'All Attendees', 'Ed Nowak', 'Mike Wimet', and 'Sean Nelson'. The 'Details' tab is also visible, showing a 'Room' list with columns for 'Room', 'Cap', and 'Time'. The room list includes '02.West' (Cap 16) and '02.East' (Cap 10). The 'When and Where' section on the left includes fields for 'Date' (12/15/2010 Wed), 'Start Time' (8:00 AM), 'End Time' (10:00 AM), 'Time zone' (Mountain Time), 'Areas' (all), 'Facilities' (Denver), and 'Find Space' button. The 'Setup Information' section includes 'Attendance' (5), 'Setup Type' (no preference), and 'Find Attendee' (se). The 'Availability Filters' section includes 'Room Type' (all), 'Floor' (all), and 'Features' (Data Projector, Polycom).

10. Do one of the following to select a room:

- Click the Add icon  next to the room in either the list or grid view.
- Click the Available Room icon for the room in the Floor Map view, and then click Reserve in the Room Details message that opens.

The selected location is displayed at the top of the Location tab.



When you book a recurring meeting using PAM, a specific room might not be available for all the dates requested. These dates are displayed at the top of the Location tab in an "Unavailable" status. You can find an available room for these dates after you submit your reservation.

11. Open the Details tab opens.

Figure 3-9: Room Request page, Details tab

The screenshot shows the 'ems' logo at the top left. Below it is a navigation bar with 'Browse', 'Reservations', 'My Account', and 'Admin'. The 'Reservations' tab is selected. The main heading is 'Book a Meeting Room'. The 'Details' tab is active. The form is organized into several sections:

- When and Where:** Includes a checkbox for 'Add to Calendar/Send Invitations', a 'Date' field (12/15/2010 Wed), a 'Recurrence' button, 'Start Time' (8:00 AM) and 'End Time' (10:00 AM) fields, a 'Time zone' dropdown (Mountain Time), an 'Area' dropdown ((all)), a 'Facilities' dropdown (Denver), and a search icon.
- Meeting Details:** Includes 'Meeting Name' and 'Meeting Type' (Meeting - Internal) fields.
- Calendaring Details:** Includes 'Subject', 'Show Time As' (Busy), 'Reminder' ((none)), and a 'Message' field. There are also 'Private' and 'Attach File' buttons.
- Setup Information:** Includes 'Attendance' (5), 'Setup Type' ((no preference)), a 'Find Space' button, and a 'Find Attendee' field.
- Employee Details:** Includes 'Employee' (Nowak, Edward J.), '1st Contact' (Nowak, Edward J.), 'Phone', 'Fax', and 'Email' (ed@dea.com) fields. There are also search icons for the contact fields.
- Billing Information:** Includes a 'Cost Center Number' (44.4444) field.

12. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (\*). At minimum, you must enter the event details (name and event type).
- You specify the appointment information in the Calendaring Details section. You can also click Attach Files to attach files to the meeting invitation.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.

- You might have the option of booking services for the event. If so, then a Service section is displayed on the Details tab.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

13. Click Submit Reservation.

- The appointment is added to your personal calendar and meeting invitations are automatically sent to the meeting attendees. The appointment form contains two embedded links (one for the organizer and one for an attendee) to access the reservation in VEMS. See [Figure 3-10](#) below.



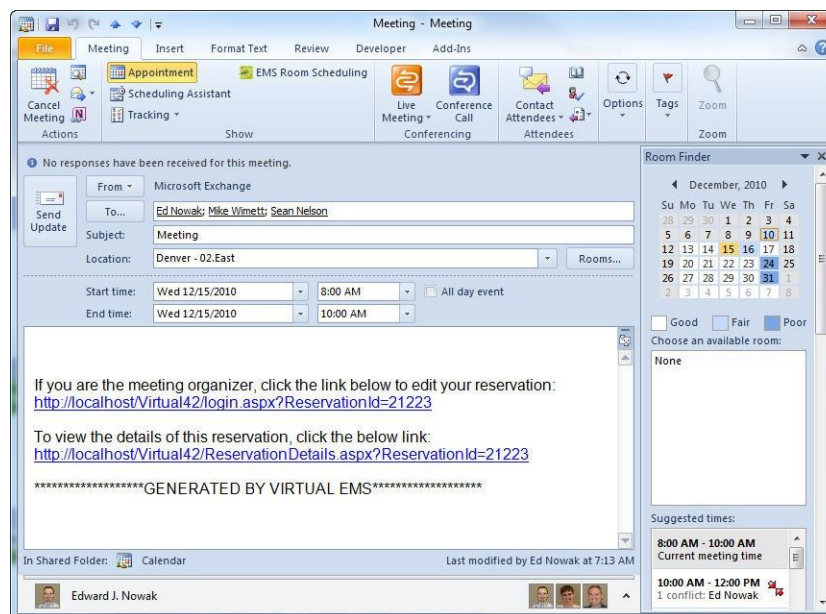
*From this point forward, you must make all booking changes in VEMS. If you modify or cancel a meeting that was originally created using the PAM feature within VEMS from your personal calendar, the meeting will not be reflected correctly in VEMS.*

- The Reservation Summary page opens. See [“The Reservation Summary Page” on page 53.](#)



*For a reservation containing multiple bookings (a recurring meeting), resolve any room conflicts using the booking tools outlined on the Reservation Summary page. See [“The Reservation Summary Page” on page 53.](#)*

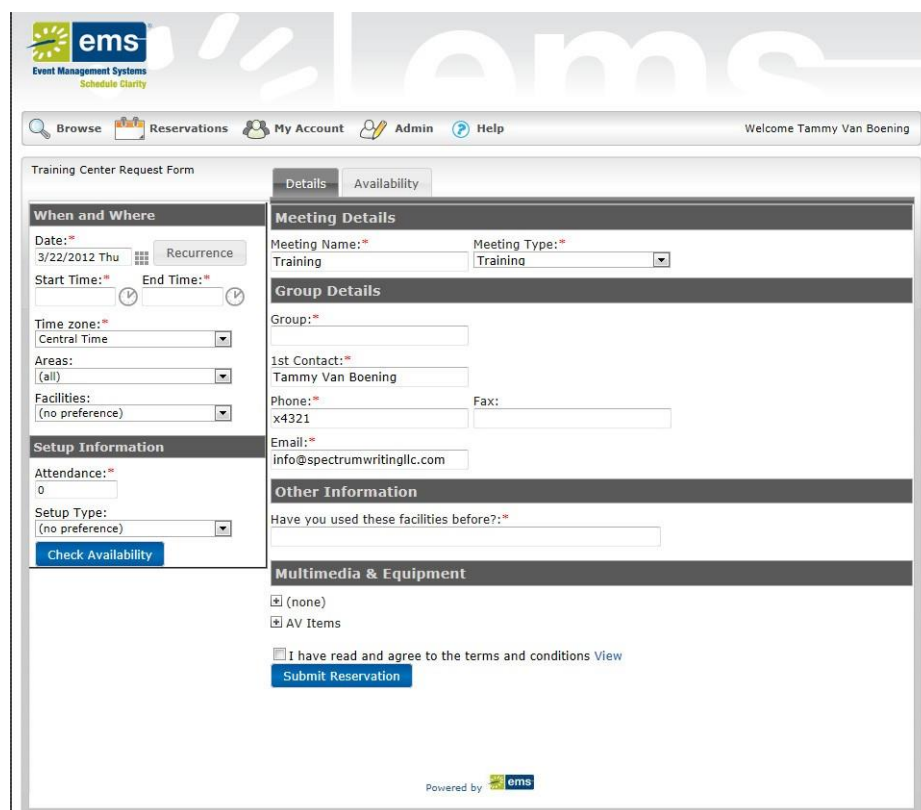
Figure 3-10: Example of an automatically generated email



## Submitting a Request for Space - An Online Request for a Room

The Room Request Form page is organized into various sections to facilitate the online [request process](#)—a When and Where pane (the left pane of the window) and two tabs—a Details tab and an Availability tab.

Figure 3-11: Room Request Form page, Details tab



The screenshot shows the 'Training Center Request Form' with the 'Details' tab selected. The form is divided into several sections:

- When and Where:** Includes fields for Date (3/22/2012 Thu), Start Time, End Time, Time zone (Central Time), Areas (all), and Facilities (no preference).
- Setup Information:** Includes Attendance (0) and Setup Type (no preference).
- Meeting Details:** Includes Meeting Name (Training) and Meeting Type (Training).
- Group Details:** Includes Group, 1st Contact (Tammy Van Boening), Phone (x4321), Fax, and Email (info@spectrumwritingllc.com).
- Other Information:** Includes a checkbox for 'Have you used these facilities before?'.
- Multimedia & Equipment:** Includes checkboxes for '(none)' and 'AV Items', and a checkbox for 'I have read and agree to the terms and conditions'.

A 'Submit Reservation' button is located at the bottom right of the form. The page is powered by EMS (Event Management Systems).

You enter the information to search for available rooms in the When and Where pane. You view the results of the search on the Availability tab, and from this information, you can determine if the room that you want is available, or if you must request another room. You enter information for the event on the Details tab.

## To submit a request for space - an online request for a room

1. Under Reservations, click a reservation option.

The Room Request page opens.



---

*Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department,” event might have relabeled “Meeting,” and so on. Required fields are marked with a red asterisk (\*).*

2. In the When and Where (left) pane of the page, do the following to search for a room or rooms in which the event is to take place:



---

*Depending on how your EMS administrator has configured your organization’s Room Request template, you might see different fields, or you might not see some of these fields displayed at all.*

- Enter your date and time criteria.
- Select a time zone.



---

*Multiple time zones are available only in EMS Enterprise. Only a single time zone is available in EMS Professional.*

- On the Areas dropdown list, leave the default value of (all) areas as is, or select a specific area to search.



---

*Areas are available only in EMS Enterprise. Areas are not available in EMS Professional.*

- On the Facilities dropdown list, select (all) buildings, or select a specific building or view to search.
  - If the meeting is a recurring meeting, then click Recurrence to open the Recurrence popup window, and then enter the necessary information for the meeting.
3. In the Setup Information section, enter your attendance and setup type.

## Chapter 3

### Reservations Menu

#### 4. Click Check Availability.

Depending on how your EMS administrator has configured the web template, two results are possible:

- A list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the Available tab. From this information, you can determine if the room that you want for the meeting is available, or if you must request another room.
- A message opens indicating that you have violated a booking rule such as the last allowed booking date. Click OK to close the message and refine your search until a list of rooms that meet the search criteria and that are available for the indicated reservation time are displayed on the Available tab. From this information, you can determine if the room that you want for the meeting is available, or if you must request another room.

Figure 3-12: \Request Room Form page, Availability tab

The screenshot shows the 'Request Room Form' page in the EMS system. The 'Availability' tab is selected, displaying a table of available rooms. The search criteria on the left are: Date: 3/20/2012 Tue, Start Time: 6:00 PM, End Time: 7:00 PM, Time zone: Mountain Time, Areas: (all), and Facilities: Denver.

| Select                   | Available | Location                     | Time zone | Capacity | Price  |
|--------------------------|-----------|------------------------------|-----------|----------|--------|
| <input type="checkbox"/> | 1/1       | Denver - 02.120              | MT        | 1        | 100.00 |
| <input type="checkbox"/> | 1/1       | Denver - 02.114              | MT        | 1        |        |
| <input type="checkbox"/> | 1/1       | Denver - 02.West             | MT        | 16       |        |
| <input type="checkbox"/> | 1/1       | Denver - 02.East             | MT        | 10       | 100.00 |
| <input type="checkbox"/> | 1/1       | Denver - 02.113              | MT        | 1        |        |
| <input type="checkbox"/> | 1/1       | Denver - 02.110              | MT        | 1        | 100.00 |
| <input type="checkbox"/> | 1/1       | Chicago - Team Training Room | CT        | 60       |        |
| <input type="checkbox"/> | 1/1       | Denver - 02.112              | MT        | 1        |        |
| <input type="checkbox"/> | 1/1       | Denver - 02.111              | MT        | 1        | 100.00 |

- Optionally, click a Room Name to open the Location Details popup. Depending upon how your EMS administrator has configured your EMS application, the popup can show varying information about the event location, including the event building details (name, description, and/or notes), any images that have been associated with the building, detailed information for the event room (description, room type, setup type, features, floor map, and availability) and any images that have been associated with the room.

Figure 3-13: Location Details popup

- Open the Details tab.

Figure 3-14: Room Request Form page, Details tab

7. Enter the information for the event:

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (\*). At minimum, you must enter the event name, the event type, and group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room. These questions are displayed in an Other Information section.
- You might have the option of booking specific resources and/or services for the event. If so, an appropriate section is displayed. For example, if you have the option of booking Multimedia Equipment, then a Multimedia Equipment section is displayed on the tab.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

8. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 53.](#)

## Requesting Services Only

When you [request](#) services only for a location that is not managed in EMS, then the Services Only Request page opens with a When and Where pane (the left pane of the window) and two tabs—a Service Availability tab and a Details tab.

Figure 3-15: Services Only Request page, Service Availability tab

The screenshot shows the 'Virtual EMS' interface. The top navigation bar includes 'Browse', 'Reservations', 'My Account', and 'Admin'. The user is logged in as 'Tammy Van Boening'. The main content area is titled 'Service Only Request' and has two tabs: 'Service Availability' (selected) and 'Details'. The 'When and Where' pane on the left contains the following fields: 'Date\*' (12/9/2010 Thu), 'Recurrence', 'Start Time', 'End Time', 'Attendance\*' (0), 'Building\*' (Corporate Headquarters), and 'Location\*'. A 'Get Services' button is at the bottom of this pane. The 'Service Availability' tab lists two services: 'Audio Visual' and 'Food Service', both with a note: 'Must be submitted at least 0 hour(s) prior to the start of the booking'. Below the services list is a checkbox 'I have read and agree to the terms and conditions View' and a 'Continue' button.

You enter the information for this location in the When and Where pane. The Service Availability tab lists the available services that you can request for the location. You enter information for the event on the Details tab.

### To request services only

1. Under Reservations, click a reservation option.

The Services Only Request page opens.



*Because VEMS is so highly configurable, the options that are outlined in the remainder of this procedure might or might not be present. In addition, certain labels might have been renamed in your implementation of VEMS. For example, “group” might have been relabeled to “client,” “employee,” or “department.” Required fields are marked with a red asterisk (\*).*



Depending on how your EMS administrator has configured your organization's Services Only Request template, you might see different fields displayed, or you might not see some of these fields displayed at all.



It might be possible to specify the default values for some of these options. See [“Setting Default Values for Room Requests” on page 70.](#)

2. In the When and Where (left) pane of the page, enter your date and time criteria.
3. In the Setup Information section, enter your attendance.
4. On the Buildings dropdown list, select the building, and then in the Location field, enter the location (room) in the building for which you are requesting services.
5. Click Get Services.

The Details tab opens.

Figure 3-16: Services Only Request page, Details tab

The screenshot shows the 'Services Only Request' page with the 'Details' tab selected. The left pane, 'When and Where', contains fields for Date (3/21/2012 Wed), Start Time (8:00 AM), End Time (10:00 AM), Attendance (10), Building (Chicago), and Location (Tea Room). The right pane, 'Meeting Details', contains fields for Meeting Name, Meeting Type, Group (Evans, Dean), 1st Contact (Montoya, Julie), 2nd Contact (none), Phone, Fax, Email, and Attachments. Below these are sections for Catering (Breakfast, Hot Breakfast, From the Bakery, Beverage, Center of the Plate Salads, Stack & Wrapped Selections, Plated Affairs, Party Trays) and Multimedia & Equipment (none, AV Items). At the bottom, there is a Billing Information section with Cost Center Number (22-2222) and Department Code. A 'Submit Reservation' button is at the bottom center.

6. Enter the information for the event.

When you are entering the event details, note the following:

- Required fields are marked with a red asterisk (\*). At minimum, you must enter the event name, the event type, and the group details.
- Some fields in the Group section might be automatically populated with your group/department information. You can modify this information. If a Search icon  is present, then you can search for a group/contact record for the event.
- If contacts are available for a group, you can specify which contact is to be the default contact for the group, and you can inactivate any contact for the group.
- You might have the option of answering additional questions, or you might be required to answer these questions when booking the room, and/or you might have the option of entering reservation-level comments. These questions and comments are displayed in an Other Information section.
- You might have the option of attaching files to the room request. If so, then an Attachments section is displayed on the Details tab. The allowed file attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.
- One or more resource/services sections will be displayed, depending on the number and type of services that were available to you. You must specify the information for the *appropriate* services for the booking. You do not have to specify information for a resource/service if you do not want to request the service for the booking.
- You might be required to specify billing information. You can manually enter the billing information, or if a Search icon  is present, then you can search for the information.
- You might be required to read and agree to Terms and Conditions. If so, you can click View to review the Terms and Conditions before you accept them.

7. Click Submit Reservation.

The Reservation Summary page opens. See [“The Reservation Summary Page” on page 53.](#)

## Viewing your Requests

The Reservations menu provides an option for all the requests for spaces and/or services that you have ever made in VEMS. You can select a specific request from this page for more detailed viewing and for editing if needed. To open the Requests page, under Reservations, click View My Requests. When the page first opens, the Current tab is the active tab. This page lists all your requests that have an event start date that is greater than or equal to the current day's date.

Figure 3-17: Requests page, Current tab

| ID            | NAME                                 | GROUP          | FIRST BOOKING | LAST BOOKING  | STATUS    | LOCATION                        | HAS SERVICES |
|---------------|--------------------------------------|----------------|---------------|---------------|-----------|---------------------------------|--------------|
| 21264 Meeting |                                      | ATL Facilities | 3/20/2012 Tue | 3/29/2012 Thu | Confirmed | New York - Collaboration Room 1 | Yes          |
| 21262 Meeting |                                      | Evans, Dean    | 6/25/2012 Mon | 6/25/2012 Mon | Request   | Denver - 02.West                | Yes          |
| 21260 Meeting |                                      | Evans, Dean    | 7/3/2012 Tue  | 7/31/2012 Tue | Request   | Denver - 02.West                | Yes          |
| 21263         | 2012 TDF Time Trial Live Watch Stage | Evans, Dean    | 7/23/2012 Mon | 7/23/2012 Mon | Request   | Denver - 02.West                | Yes          |

You can carry out the following actions from the Requests page:

- To view the list of requests in a Calendar view, open the Calendar tab.
- To search for a reservation, enter a reservation ID in the Reservation ID field and/or a search string in the Event Name field, and then click Quick Search.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns the College of **E**ducation Seminar, **E**d Smith fundraiser, Health Center **E**ducation Training, and so on.*

- To view all requests that have a date older than the current day's date, open the Historical tab.
- To open a selected reservation for viewing and/or editing on the Reservation Summary page, click the name of the reservation. See [“The Reservation Summary Page” on page 53.](#)

## The Reservation Summary Page

After you submit *any* type of reservation request, the Reservation Summary page opens. The Reservation Summary page also opens after you select View My Requests on the Reservations menu, and then select a specific reservation request for viewing. In both cases, the Reservation Details tab is the active tab. The Reservation Details tab on the Reservation Summary page displays summary information for the selected reservation and all its bookings as well as any services that were requested for the bookings.

Figure 3-18: Reservation Summary page, Reservation Details tab

The screenshot displays the 'Reservation Details' tab of the Reservation Summary page. The top navigation bar includes 'Browse', 'Reservations', 'My Account', 'Admin', and 'Help', with a welcome message for Tammy Van Boening. The main content area has three tabs: 'Reservation Details' (active), 'Additional Information', and 'Attachments'. The reservation details are as follows:

|                           |                                      |                         |             |
|---------------------------|--------------------------------------|-------------------------|-------------|
| <b>Reservation Id</b>     | 21263                                | <b>Group Name</b>       | Evans, Dean |
| <b>Meeting Name</b>       | 2012 TDF Time Trial Live Watch Stage | <b>1st Contact Name</b> | (none)      |
| <b>Meeting Type</b>       | Meeting - Internal                   | <b>2nd Contact Name</b> |             |
| <b>Cost Center Number</b> | 22.2222                              | <b>Phone</b>            |             |
| <b>Department Code</b>    |                                      | <b>Phone</b>            |             |

On the right side, there is a list of actions: Edit Reservation, Add Booking, Cancel Services, Cancel Bookings, Cancel All Bookings, Service Availability, View Reservation Summary, Add booking to personal calendar, Booking Tools, and Edit Additional Information. Below the details, there are tabs for 'All', 'Current' (selected), and 'Historical'. The 'Bookings' table is shown below:

| ACTIONS | SERVICES | DATE          | TIME                  | TITLE                                | LOCATION         | STATUS  | SETUP       |
|---------|----------|---------------|-----------------------|--------------------------------------|------------------|---------|-------------|
|         |          | 7/23/2012 Mon | 6:00 PM - 11:00 PM MT | 2012 TDF Time Trial Live Watch Stage | Denver - 02.West | Request | (none) (50) |

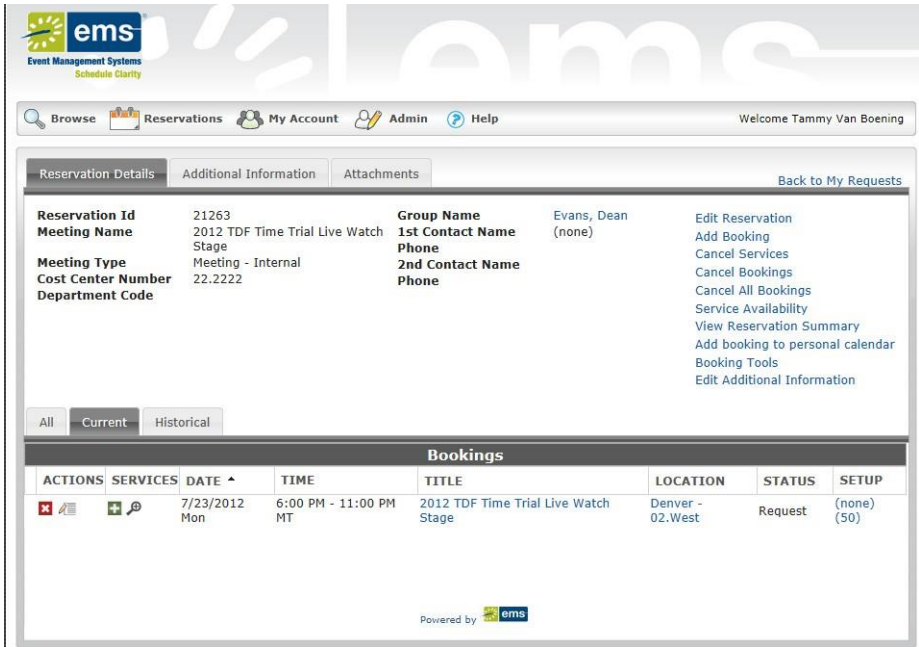
The page is powered by EMS.

In addition to the Reservation Details tab, the Reservation Summary page might have up to two additional tabs in the top pane of the page—the Additional Information tab and the Attachments tab. The Reservation Summary page also has three tabs in the bottom pane—All, Current, and Historical of the page. See:

- “Reservation Details tab” on page 54.
- “Additional Information tab” on page 55.
- “Attachments tab” on page 56.
- “Current tab” on page 57.

# Reservation Details tab

Figure 3-19: Reservation Summary page, Reservation Details tab



The Reservation Details tab displays detailed summary information (the Reservation ID, the Event Name, the Event Type, and so on) for the selected reservation and all its bookings as well any services that were requested for the bookings. The following links are displayed on the Reservation Details tab. Click a link to carry out the indicated action.

| Link                 | Description                                                                                                                                                                                                                     |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit Reservation     | Update event and/or group details.                                                                                                                                                                                              |
| Manage Attendees     | Add or remove attendees. (Available only if using the optional Plan a Meeting (PAM) module.)                                                                                                                                    |
| Add Bookings         | Add a booking to the reservation. See <a href="#">“Submitting a Request for a Space - Booking a Room” on page 30.</a>                                                                                                           |
| Cancel Services      | Cancel selected services for all bookings in the reservation.<br><b>Note:</b> You can also cancel selected services for one or more bookings in a reservation on the Current tab. See <a href="#">“Current tab” on page 57.</a> |
| Cancel Bookings      | Cancel selected bookings for the reservation.<br><b>Note:</b> You can also cancel selected bookings on the Current tab. See <a href="#">“Current tab” on page 57.</a>                                                           |
| Cancel All Bookings  | Cancel all bookings for the reservation.                                                                                                                                                                                        |
| Service Availability | Opens a Service Availability message in which you can view the buildings for which the service is allowed as well as any booking rules for the service.                                                                         |

| Link                             | Description                                                                                                                                                                                                                                                                   |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Reservation Summary         | Provides a summary of the selected reservation, all its bookings, and any resources/services that were ordered. Three views are available—Detail, Summary, and Mobile Friendly. The summary also contains an Email Option for emailing the summary to one or more recipients. |
| Add booking to personal calendar | Adds the reservation and all its bookings to your personal calendar.                                                                                                                                                                                                          |
| Booking Tools                    | Provides options for editing multiple bookings (date and time) for the reservation.                                                                                                                                                                                           |
| Edit Additional Information      | Provides the option for modifying your answers to any questions or modifying any comments for the reservation.                                                                                                                                                                |

## Additional Information tab

Figure 3-20: Reservation Summary page, Additional Information tab

ems Event Management Systems Schedule Clarity

Browse Reservations My Account Admin Help Welcome Tammy Van Boening

Reservation Details **Additional Information** Attachments [Back to My Requests](#)

• Would you like someone from Meeting Services to assist you with this meeting/event?  
• No

All **Current** Historical

| Bookings |          |               |                       |                                      |                  |         |             |  |
|----------|----------|---------------|-----------------------|--------------------------------------|------------------|---------|-------------|--|
| ACTIONS  | SERVICES | DATE ▲        | TIME                  | TITLE                                | LOCATION         | STATUS  | SETUP       |  |
|          |          | 7/23/2012 Mon | 6:00 PM - 11:00 PM MT | 2012 TDF Time Trial Live Watch Stage | Denver - 02.West | Request | (none) (50) |  |

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The Additional Information tab is displayed only if you had the option to answer questions or were required to answer questions when making the reservation request, and/or you had the option of entering comments for the reservation. The tab is a view-only tab and it displays the questions and your answers, if any, to these questions, as well as any comments that you entered for the reservation.



To modify the answers to any questions that are displayed on this tab, you must open the Reservation Details tab, and then click the Edit Additional Information link. See [“Reservation Details tab” on page 54.](#)

## Attachments tab

Figure 3-21: Reservation Summary page, Attachments tab

The screenshot displays the EMS Event Management Systems interface. At the top, there's a navigation bar with links for Browse, Reservations, My Account, Admin, and Help. The main content area is divided into tabs: Reservation Details, Additional Information, and Attachments. The Attachments tab is active, showing a table of attachments. Below this, there's a section for Bookings, which includes a table with columns for Actions, Services, Date, Time, Title, Location, Status, and Setup. A single booking is listed for 7/23/2012 Mon, 6:00 PM - 11:00 PM MT, titled '2012 TDF Time Trial Live Watch Stage' at 'Denver - 02.West' with a status of 'Request' and a setup of '(none) (50)'.

| FILE NAME                                                                         | DESCRIPTION               | FILE NAME                 | NOTES |
|-----------------------------------------------------------------------------------|---------------------------|---------------------------|-------|
|  | LocationDetails_popup.png | LocationDetails_popup.png |       |
|  | Groups.xls                | Groups.xls                |       |

Attach File

All Current Historical

| Bookings                                                                                                                                                            |                                                                                                                                                                     |               |                       |                                      |                  |         |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------------|--------------------------------------|------------------|---------|-------------|
| ACTIONS                                                                                                                                                             | SERVICES                                                                                                                                                            | DATE ^        | TIME                  | TITLE                                | LOCATION         | STATUS  | SETUP       |
|   |   | 7/23/2012 Mon | 6:00 PM - 11:00 PM MT | 2012 TDF Time Trial Live Watch Stage | Denver - 02.West | Request | (none) (50) |

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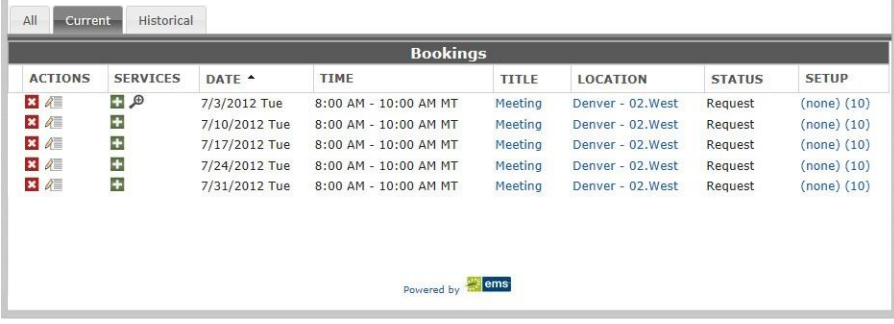
The Attachments tab is displayed if you had the option of attaching files to the room reservation request. This tab displays the following information for each attachment—the attachment description, the attachment file name, and any notes that were entered for the attachment. You can do the following on this tab:

- To delete an attachment from a reservation or request, click the Delete icon  next to it.
- To attach another file to the reservation or request, click Attach File. A dialog box opens in which you can browse to and select the attachment. (Allowed attachment formats are .csv, .doc, .gif, .pdf, .txt, .xls, .xlsx, and .tif.)

## Current tab

The All tab displays *all* the bookings for the selected reservation, regardless of the booking date. The Current tab displays all the *current* bookings (bookings with a date greater than or equal to the current day's date) for the selected reservation. The Historical tab displays all the past bookings (bookings with a date before the current day's date) for the selected reservation.

Figure 3-22: Reservation Summary page, Current tab



| Bookings                                                                                                                                                            |                                                                                                                                                                     |               |                       |         |                  |         |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------------|---------|------------------|---------|-------------|
| ACTIONS                                                                                                                                                             | SERVICES                                                                                                                                                            | DATE ^        | TIME                  | TITLE   | LOCATION         | STATUS  | SETUP       |
|   |   | 7/3/2012 Tue  | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|   |                                                                                    | 7/10/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|   |                                                                                    | 7/17/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|   |                                                                                    | 7/24/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|   |                                                                                    | 7/31/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |

Powered by 

You can do the following on the Current tab:

- To cancel a booking, click the Cancel Booking icon  next to it.
- To edit a booking, click the Edit Booking icon  next to it. See [“To edit a booking” on page 58.](#)
- To add services (attendees/visitors, setup notes, resources with service orders and/or resources without service orders) to a booking, click the Add/Edit Services icon  next to it, and then continue to [“To add services for a booking” on page 58.](#)
- To edit and/or cancel (delete) services (attendees/visitors, setup notes, resources with service orders and/or resources without service orders) for a booking, click the Add/Edit Services icon  next to it, and then continue [“To edit and/or cancel services for a booking” on page 61.](#)
- To view services for a booking, click the View Services icon  next to it.

## To edit a booking

After you click the Edit Booking icon  next to the booking that you are editing, a Request page opens.



*The Request page that opens depends upon the type of booking that you are editing—a booking for reserving a room, a booking for requesting a room, or a booking for services only.*

1. Edit the information for the booking as needed.



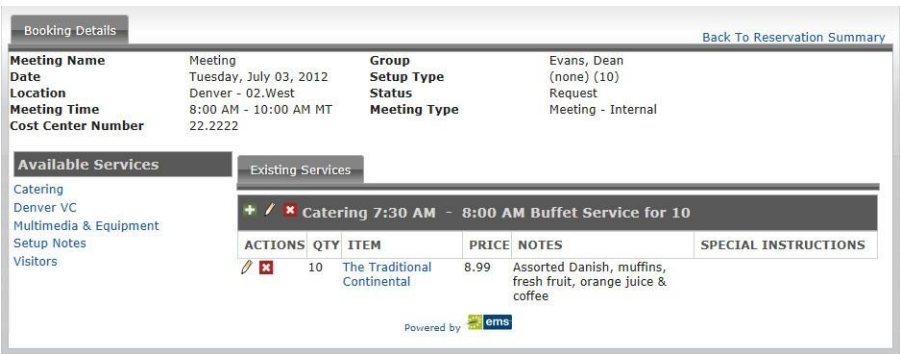
*Required fields are marked with a red asterisk (\*).*

2. At the bottom of the Request page, click Update Booking.  
A message opens indicating that the booking was successfully updated.
3. Click OK.  
The message closes. You return to the Reservation Summary page with the new or modified information for the booking displayed.

## To add services for a booking

After you click the Add/Edit Services icon  next to a booking, the Booking Details tab opens. This tab displays not only summary information for the booking (event name, event date, location, and so on), but also the services that are available for adding to the booking (Available Services tab) and the services that you have already added to the booking (Existing Services tab).

Figure 3-23: Booking Details tab



The screenshot shows the 'Booking Details' tab with a 'Back To Reservation Summary' link. It displays meeting information and a list of services.

| Meeting Name       | Meeting                | Group        | Evans, Dean        |
|--------------------|------------------------|--------------|--------------------|
| Date               | Tuesday, July 03, 2012 | Setup Type   | (none) (10)        |
| Location           | Denver - 02.West       | Status       | Request            |
| Meeting Time       | 8:00 AM - 10:00 AM MT  | Meeting Type | Meeting - Internal |
| Cost Center Number | 22.2222                |              |                    |

| Available Services     |  | Existing Services                                                                                                                                                                                                        |  |
|------------------------|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Catering               |  |   Catering 7:30 AM - 8:00 AM Buffet Service for 10 |  |
| Denver VC              |  |                                                                                                                                                                                                                          |  |
| Multimedia & Equipment |  |                                                                                                                                                                                                                          |  |
| Setup Notes            |  |                                                                                                                                                                                                                          |  |
| Visitors               |  |                                                                                                                                                                                                                          |  |

| ACTIONS                                                                                                                                                                 | QTY | ITEM                        | PRICE | NOTES                                                        | SPECIAL INSTRUCTIONS |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----------------------------|-------|--------------------------------------------------------------|----------------------|
|   | 10  | The Traditional Continental | 8.99  | Assorted Danish, muffins, fresh fruit, orange juice & coffee |                      |

Powered by 

1. On the Available Services tab, click the link for the type of service that you are adding to the booking.

The Available Services tab is refreshed with options based on the type of service that you are adding.

- If you are adding resources with service orders, catering (food) services, resources without service orders, setup notes and/or a room charge, go to [Step 2](#).
  - If you are adding attendees/visitors, then go to [Step 3](#).
2. Enter the necessary information for the services that you are adding to the booking, and then at the bottom of the page, click Save.



*Required fields are marked with a red asterisk (\*). Depending on the booking detail that you are adding, you might have to supply additional information such as the start and end times, the estimated count, and so on. You might also have to answer service-specific questions, and/or have to agree to Terms and Conditions.*

The Available Services tab closes. You return to the Booking Details tab.

- If the reservation for which you edited the booking has but this single booking, then a message opens indicating that your request was completed successfully. Click OK to close the message and remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.
- If the reservation for which you edited the booking has multiple bookings, then do one of the following:
  - To add the booking detail to just this selected booking, click Do Not Apply to Additional Bookings. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.
  - To add the booking detail to one or more of the other bookings in the reservation, select the appropriate bookings (to select all the remaining bookings in a single step, select the blank checkbox in front of the Date column heading), and then click Save. A message opens indicating that your request was completed successfully. Click OK to close the message. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.



*Any resource conflicts are marked with a Warning icon and highlighted in red. See [Figure 3-24](#) below.*

Figure 3-24: Resource conflict indicated

| Bookings |         |          |               |                       |         |                  |         |             |
|----------|---------|----------|---------------|-----------------------|---------|------------------|---------|-------------|
|          | ACTIONS | SERVICES | DATE ^        | TIME                  | TITLE   | LOCATION         | STATUS  | SETUP       |
|          |         |          | 7/3/2012 Tue  | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|          |         |          | 7/10/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |
|          |         |          | 7/17/2012 Tue | 8:00 AM - 10:00 AM MT | Meeting | Denver - 02.West | Request | (none) (10) |

3. For *each* attendee/visitor that you are adding to the booking, enter the necessary information, and then click Save.



*Required fields are marked with a red asterisk (\*).*

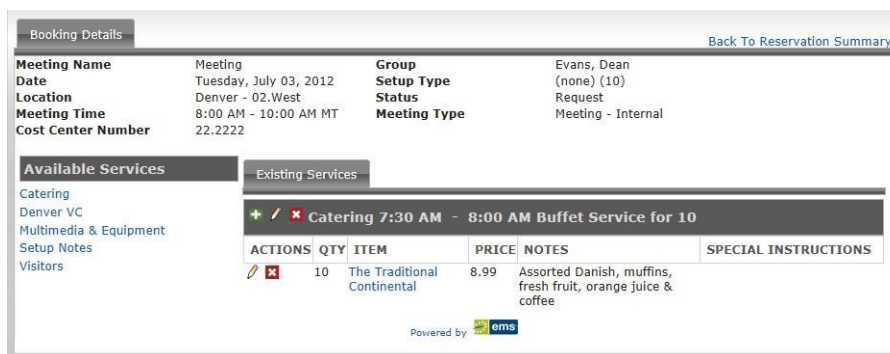
You remain on the Attendees/Visitor page.

4. *After* you add all necessary attendees/visitors, do one of the following:
  - If the reservation for which you edited the booking has but this single booking, then click Back to Reservation Summary page.
  - If the reservation for which you edited the booking has multiple bookings, then do one of the following:
    - To add the booking detail to just this selected booking, click Back to Reservation Summary page.
    - To add the booking detail to one or more of the other bookings in the reservation, click Add to Additional Bookings. You return to the Booking Details tab. Select the appropriate bookings (to select all the remaining bookings in a single step, select the blank checkbox in front of the Date column heading), and then click Save. You remain on the Booking Details tab. The newly added booking detail is displayed on the Existing Services tab.

## To edit and/or cancel services for a booking

After you click the Add/Edit Services icon  next to a booking, the Booking Details tab opens. This tab displays not only summary information for the booking (event name, event date, location, and so on), but also the services that are available for adding to the booking (Available Services tab) and the services that have already been added to the booking (Existing Services tab).

Figure 3-25: Booking Details tab



The screenshot shows the 'Booking Details' tab with a 'Back To Reservation Summary' link. The booking information is as follows:

|                           |                        |                     |                    |
|---------------------------|------------------------|---------------------|--------------------|
| <b>Meeting Name</b>       | Meeting                | <b>Group</b>        | Evans, Dean        |
| <b>Date</b>               | Tuesday, July 03, 2012 | <b>Setup Type</b>   | (none) (10)        |
| <b>Location</b>           | Denver - 02.West       | <b>Status</b>       | Request            |
| <b>Meeting Time</b>       | 8:00 AM - 10:00 AM MT  | <b>Meeting Type</b> | Meeting - Internal |
| <b>Cost Center Number</b> | 22.2222                |                     |                    |

Below the booking information are two tabs: 'Available Services' and 'Existing Services'. The 'Existing Services' tab is active, showing a service titled 'Catering 7:30 AM - 8:00 AM Buffet Service for 10'. Below this is a table of items:

| ACTIONS                                                                                                                                                             | QTY | ITEM                        | PRICE | NOTES                                                        | SPECIAL INSTRUCTIONS |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----------------------------|-------|--------------------------------------------------------------|----------------------|
|   | 10  | The Traditional Continental | 8.99  | Assorted Danish, muffins, fresh fruit, orange juice & coffee |                      |

At the bottom, it says 'Powered by 

You have the following options for editing and/or canceling (deleting) the services for a booking:

- To add a new item to a service, click the New Item icon  for the service.
- To edit the service, for example, the start and stop times for a Catering service, click the Edit icon  for the service.
- To cancel (delete) the service (which deletes all items in the service), click the Cancel Service Order icon  for the service.
- To edit a single item for a service, for example, the quantity and/or special instructions for an item, click the Edit Item  icon next to the item.
- To cancel (delete) a single item for a service, click the Cancel Item icon  next to the item.

## Chapter 3

### Reservations Menu

# Chapter 4

## My Acct Menu

---

The My Account menu provides options for editing your user profile and for specifying *delegates*, which are web users who can assume your identity in VEMS and carry out actions in VEMS on your behalf. It also contains options for customizing some default values (Start Time, End Time, and so on) for the different types of room requests and for creating a list of favorite rooms to search for availability.

This chapter covers the following topics:

- [“Creating a User Account” on page 65.](#)
- [“Modifying your User Account” on page 67.](#)
- [“Creating Delegate Accounts” on page 69.](#)
- [“Setting Default Values for Room Requests” on page 70.](#)
- [“Creating a List of Favorite Rooms” on page 72.](#)



## Creating a User Account

The VEMS Default page is the page that you first have access to before you log into VEMS or before you request to [create](#) a user account.

### To create a user account

1. On the VEMS Default page, under my Account, click Create An Account.

The Create An Account page opens.

Figure 4-1: Create An Account page

The screenshot shows the 'Create An Account' page in the VEMS system. At the top, there is an EMS logo with the tagline 'Event Management Systems Schedule Clarity'. Below this is a 'My Account' header bar with a 'Welcome Guest' message. The main content area is titled 'User Info' and contains a form with the following fields: 'Email:' (required), 'Name:' (required), 'Phone:', 'Fax:', 'Time zone:' (dropdown menu with '(no preference)' selected), 'Password:' (required), 'Confirm Password:' (required), and 'Notes:'. There is a checkbox labeled 'I do NOT want to receive automatic emails'. Below the form is a Zend Captcha widget showing a distorted image of the word 'Zend' and a text input field for the user to type the code. A 'Show another code' link is provided. At the bottom of the form is a 'Save' button. The footer of the page says 'Powered by EMS'.

2. Enter the information for your user account.
  - Required fields are marked with a red asterisk (\*).
  - The option to opt out of receiving automatic emails from VEMS refers to emails such as event reminders, the reservation summary that is emailed when you submit your reservation, and view or modify miscellaneous notes for the account.
  - The code that you are prompted to enter is used to authenticate your request to create an account. The code is case-sensitive, and therefore, you must enter the code exactly as it is displayed. If you cannot read the code that is displayed, then you can always select Show another code.
  - VEMS does not impose any rules on your account's password; however, you might have to adhere to your organization's standards for passwords.

3. Click Save.

Depending on how VEMS has been implemented at your organization, one of two results is possible:

- Your account is immediately activated.
- Your account is placed in a pending status and must be approved by your EMS administrator before it can be activated.

# Modifying your User Account

Your user account specifies your email address, your name, your phone number, your fax number, and your time zone. You can [modify](#) all these values. Your user account also provides the option of [modifying](#) your VEMS password.

## To modify your user account

1. Under My Account, click Edit My Account.

The User Account page opens. The User Info tab is the active tab.

Figure 4-2: User Account page, User Info tab

The screenshot displays the 'User Account' page with the 'User Info' tab selected. The page header includes the 'ems' logo and 'Virtual EMS' text. A navigation bar contains links for 'Browse', 'Reservations', 'My Account', and 'Admin'. A welcome message 'Welcome Tammy Van Boening' is visible. The main content area contains a form with the following fields:

- Email: info@spectrumwritingllc.com
- Name: Tammy Van Boening
- Phone: 303-840-1755
- Fax: (empty)
- Time zone: Mountain Time (dropdown menu)
- Password: (empty)
- Confirm Password: (empty)
- Notes: (empty text area)
- ☐ I do NOT want to receive automatic emails
- Save button

At the bottom right, it says 'Powered by ems'.

2. Do one or more, or all of the following:
  - Modify any of the information for your account as needed—your email address, name, phone number, and so on.



*If you log into VEMS using your network email address and you change your email address, then this new email address is the address that you must now use for logging in.*

- To change your password, enter your new password in the Password field, and then enter the exact same password again in the Confirm Password field.



*Options might also be present to opt out of receiving automatic emails that are received from VEMS such as reminders or the reservation summary that is emailed when you submit your reservation and/or view and modify miscellaneous notes for the account.*

3. Click Save.

# Creating Delegate Accounts

A *delegate* is another web user who can assume your identify upon logging into VEMS and carry out actions on your behalf. You can [create](#) one or more delegate accounts.

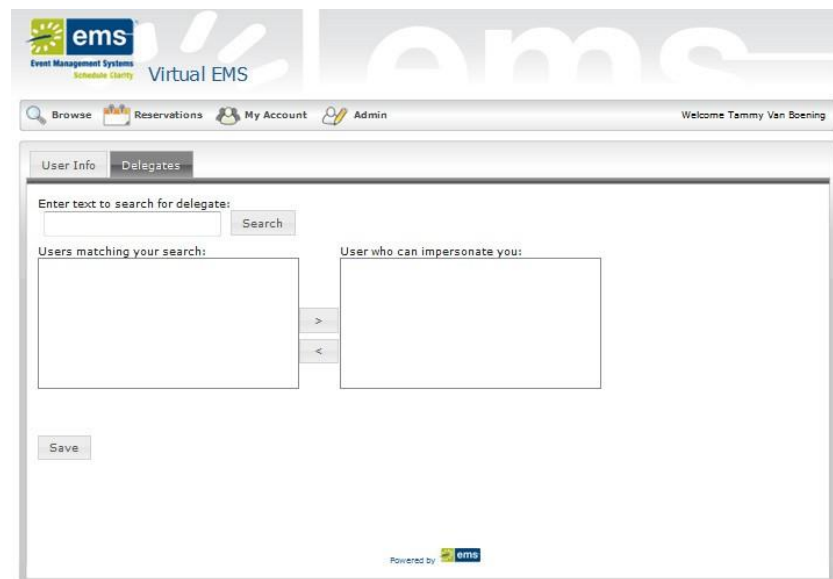
## To create delegate accounts

1. Under My Account, click Edit My Account.

The User Account page opens. The User Info tab is the active tab.

2. Open the Delegates tab.

Figure 4-3: User Account page, Delegates tab



3. In the search field, enter a search string to search for users who are to be your delegates, and then click Search.

A list of users who meet the search criteria are displayed in the Users matching your search pane.



*Your search is limited to the exact order of the characters in the string, but the string is not case-sensitive and it can appear anywhere in the search results. For example, a search string of **ed** returns **Ed** Smith, **Ted** Wilson, and so on.*

4. Select the web user, or CTRL-click to select the multiple web users who are to be your delegate accounts, and then click the Move (>) button to move the selected users to the User who can impersonate you list.
5. Click Save.

# Setting Default Values for Room Requests

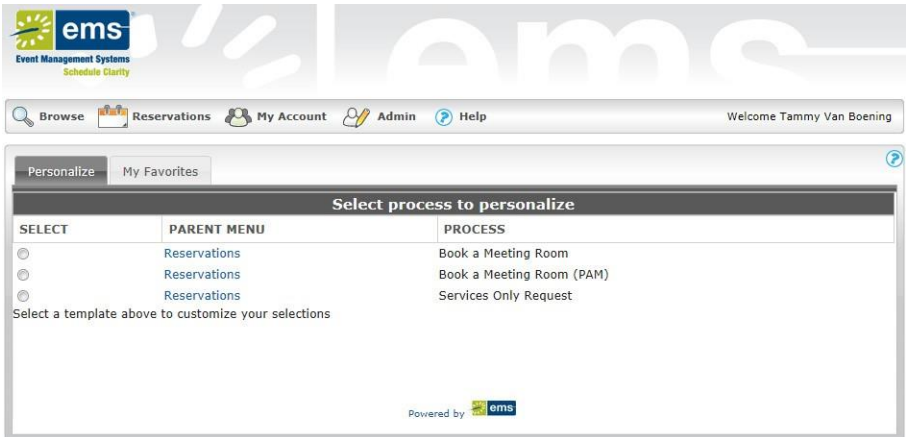
The My Account menu contains options for [setting](#) some default values (Start Time, End Time, and so on) for the different types of room requests.

## To set default values for room requests

1. Under My Account, click User Options.

The User Personalization page opens. The Personalize tab is the active tab.

Figure 4-4: User Personalization page, Personalize tab



2. Select the room request process for which you are setting the default values.

A Personalize Options section is displayed on the tab is refreshed. This section displays the list of options for the template for which you can set default values. See [Figure 4-5 on page 71](#).

Figure 4-5: User Personalization page, Personalization Options section

The screenshot shows the 'User Personalization' page in the EMS system. The page has a header with the EMS logo and a navigation bar with links for Browse, Reservations, My Account, Admin, and Help. The user is logged in as Tammy Van Boening. The main content area is titled 'Personalize' and contains a 'Select process to personalize' table. The table has three columns: SELECT, PARENT MENU, and PROCESS. The first row is selected, showing 'Reservations' in the PARENT MENU and 'Book a Meeting Room' in the PROCESS column. Below the table is the 'Personalization Options' section, which includes fields for Start Time, End Time, Display Results As (List, Grid, Floor Map), Meeting Name, Meeting Type, Time zone, Areas, Facilities, Setup Type, Room Type, and Floor. A 'Save Preferences' button is at the bottom.

| SELECT                           | PARENT MENU  | PROCESS                   |
|----------------------------------|--------------|---------------------------|
| <input checked="" type="radio"/> | Reservations | Book a Meeting Room       |
| <input type="radio"/>            | Reservations | Book a Meeting Room (PAM) |
| <input type="radio"/>            | Reservations | Services Only Request     |

**Personalization Options**

Start Time:

End Time:

Display Results As  
☒ List ☐ Grid ☐ Floor Map

Meeting Name:

Meeting Type:

Time zone:

Areas:

Facilities:

Setup Type:

Room Type:

Floor:

3. Set the default values as needed for any and all of the displayed options, and then click Save.

Now, any time you select this room request process on the Reservations menu, the default values that you enter here are automatically displayed when the Room Request page opens.

## Creating a List of Favorite Rooms

The My Account menu contains options for [creating](#) a list of favorite rooms that can be searched for availability when you are creating a room request. This list of favorites is displayed in the Facilities dropdown list on the Room Request page.

### To create a list of favorite rooms

1. Under My Account, click User Options.

The User Personalization page opens. The Personalize tab is the active tab.

2. Open the My Favorites tab.

Figure 4-6: User Personalization page, My Favorites tab

The screenshot shows the 'My Favorites' tab in the User Personalization page. At the top, there's a navigation bar with 'Personalize' and 'My Favorites' tabs. Below the tabs, there's a 'Name' field containing 'My Favorites' and a 'Save' button. A section titled 'Locations in your favorites' displays the message 'No one matched your request'. Below this, there are three dropdown menus for 'Building', 'Room Types', and 'Floor', all currently set to '(all)'. To the right of these dropdowns is a search icon. Below the dropdowns, a section titled 'Top 500 Rooms matching your filter' displays the message 'Nothing matches your search criteria'. At the bottom of the page, it says 'Powered by EMS'.

3. In the Name field, enter a name for your Favorites list, and then click Save.  
A message opens, indicating that your request was completed successfully.
4. Click OK to close the message and remain on the Favorites tab.
5. Enter the search criteria on the Building dropdown list, the Room Type dropdown list, and/or the Floor dropdown list, and then click the Search icon  to return only those rooms that meet all the search criteria.

See [Figure 4-7 on page 73](#).

Figure 4-7: User Personalization page, My Favorites tab with search results

ems Event Management Systems Schedule Clarity Virtual EMS

Browse Reservations My Account Admin Welcome Tammy Van Boening

Personalize My Favorites

Name: My Favorites Save

Locations in your favorites

No one matched your request

Building: Corporate Center West Room Types: (all) Floor: (all) Search

Top 500 Rooms matching your filter

| ADD | BUILDING              | ROOM                      | ROOM TYPE        | FLOOR            |
|-----|-----------------------|---------------------------|------------------|------------------|
| +   | Corporate Center West | Cafeteria                 | Multi-Purpose    | Mezzanine        |
| +   | Corporate Center West | Small Conference Room     | Conference       | Executive Suites |
| +   | Corporate Center West | Video Conference Room 201 | Video Conference | 1st Floor        |
| +   | Corporate Center West | Video Conference Room 202 | Video Conference | 1st Floor        |

Powered by ems

- Click the Select icon  next to each room that you are including in your Favorites list.
- Now, when you select any type of room request process for which you can book a room, the name of your Favorites list is automatically displayed in the Facilities field for the request. If you leave the Facilities field set to this value, then all the rooms that are contained in this Favorites list are automatically searched for availability after you click Find Space.

Chapter 4  
My Acct Menu

# Chapter 5

## Mobile VEMS

---

VEMS is available both in a desktop client version and in a mobile version. If you access VEMS from a mobile device, you are redirected to the mobile version of VEMS.

This chapter covers the following topics:

- [“Working with the Mobile Version of VEMS” on page 77.](#)



# Working with the Mobile Version of VEMS

If you access VEMS from a mobile device, you are redirected to the VEMS mobile version.

Figure 5-1: VEMS mobile version, Home page

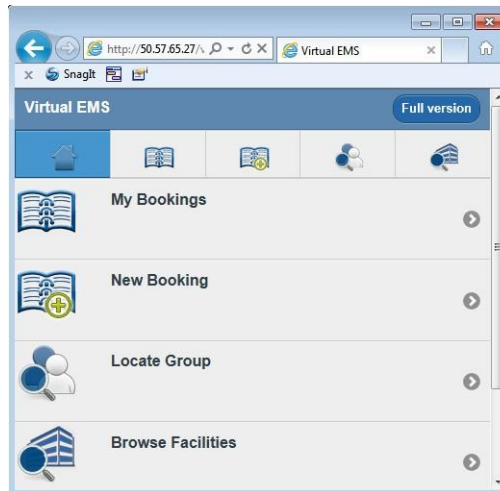


Table 5-1: Icons on the Mobile VEMS Home page

| Icon                                                                                | Description                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Click the Home icon at any time to return to the Mobile VEMS Home page.                                                                                                                                                                                                                                                                                                        |
|  | Click the My Bookings icon to open a page on which you can view all the bookings that you have made in VEMS.                                                                                                                                                                                                                                                                   |
|  | Click the New Bookings icon to open a page on which you can enter bookings in VEMS.                                                                                                                                                                                                                                                                                            |
|  | Click the Groups icon to open a page that lists all the groups for which you can make a booking in VEMS. You can also search for groups on this page.                                                                                                                                                                                                                          |
|  | Click the Browse Facilities icon to open a page that lists all the facilities that you can book in VEMS. You can also search for facilities on this page.<br><b>Note:</b> A Map icon  might be displayed next to a facility. Click this icon to view the location of the facility on a map. |



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