Web App Reference Guide for EMS

About this guide ... ......................................................................................................................2
EMS Definitions ...............................................................................................................................2
Navigating the EMS Web App ..........................................................................................................3
Making Reservations ......................................................................................................................4
   Single Reservation ....................................................................................................................4
   Recurring Reservation ..............................................................................................................9
Cancelling a Reservation ...............................................................................................................11
Editing a Reservation ....................................................................................................................13
Adding Services to an Existing Reservation ...............................................................................15
Browsing in the Web App .............................................................................................................16
   Events ..................................................................................................................................16
   Locations ..............................................................................................................................18
About this guide
This guide is designed to be a quick reference for common tasks within the EMS Web App. For more details about how to make or edit reservations, see an EMS Administrator.

EMS Definitions
Reservation – The “Who and the What.” This contains the meeting/event host information and what the event is called. A reservation can have multiple bookings.

Booking – The “When and the Where.” This contains the date/time/location information for each occurrence of a reservation. A reservation has to have at least one booking, but can have as many bookings as needed (think of a recurring meeting – each occurrence is a booking).
Navigating the EMS Web App

Your EMS Web App home page looks like below.

1. On the left, you have a menu bar with the following options:
   - **Create a Reservation**: takes you to your reservation templates
   - **My Events**: takes you to your event list of upcoming and past events in EMS
   - **Browse**: takes you to the search features in the Web App
     - **Events**: See all events in your organization
     - **Locations**: See the free/busy of all the rooms in your organization
     - **People**: See the same-day events for the people in your organization

2. On the main section of the page, you see **My Reservation Templates**, which allows you to make a quick booking right from your home page.

3. Below that is a list of your bookings for the day along with a search option to find your reservations.

4. Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.
Making Reservations

Single Reservation

1. To make a reservation, begin at either My Home or Create Reservation
2. Click book now next to the template you wish to use
   *NOTE – The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The about button will tell you the rules of the template.

3. Select your date and time

4. Enter the Number of People to find a room that will best fit the size of your meeting.
5. Click on add/remove under setup types to select the setup style that works best for your meeting or event.
6. Click the magnifying glass to get your list of available rooms.
   *NOTE* – If you don’t wish to enter any filtering, you can click on the top magnifying glass for a quick search of all spaces

7. Select a room by clicking on the purple + next to the room name
   *NOTE* – Clicking the room name will give you the room details

8. After selecting the room, the space you’ve selected will show up under **Selected rooms** at the top of the page.
9. **To add more rooms at the same date and time on the same reservation**, simply click the plus sign next to any additional rooms you would like to add. You will see the additional rooms populated under **selected rooms**.

10. **To add more rooms at a different date and time on the same reservation**, just change the date and time selector, and hit the magnifying glass to update the list of rooms available at your new date and time. You will see the additional rooms populated under **selected rooms**.

11. You can click on the **services** button at the top of the screen to add services.

   *NOTE* – You can click **Reservation Details** if you want to skip adding services and finish your request.

12. If you choose to add services, click on the resource you wish to add and enter the quantity of the resource you need and any special instructions (if needed).

13. Click **OK** when done adding the resource.
14. A summary of your services will build on the right side of the screen

**Services Summary**

**Furniture**

- 10 Chairs - Black Folding
- 1 Podium
- 1 6’ - Table - Rectangle

15. Click **Next Step** to enter your reservation details

16. Enter your **Event Details**
   
   **NOTE** – Anything with an ‘*’ next to it is a required field.

**Reservation Details**

**Event Details**

- **Event Name** *
  - EMS Meeting

- **Event Type** *
  - Meeting - Campus

**Group Details**

- **Group** *
  - Event Services

- **1st Contact**
  - John Ellison

- **1st Contact Phone** *
  - 295-4004

- **1st Contact Email Address** *
  - jellison@umhb.edu
17. Add the **Group Details** – this is who will be hosting the event. This should be linked to your everyday user account. Your information will be in the drop-down menu.

18. **1st contact** – this is the contact for the event (if it is someone different than yourself)

19. Add **Additional Information** –
   
a. Add description if you wish this event to be displayed on the public calendar
b. Indicate if you will need catering. **NOTE:** this does not mean that you have ordered catering, it will simply let catering know you are anticipating this need
c. Select yes if you would like this event to appear on the public calendar
d. Select the appropriate description of your event from the options listed

20. Click **Create Reservation**

21. You will be directed to a success page where you can immediately edit the reservation if needed.

**Reservation Created**

Reserved

What would you like to do now?

> Edit this reservation.
Recurring Reservation

1. Go to **Create Reservation**
2. Choose your template and click **book now**
3. When choosing your date/time, select the **Recurrence** button
4. Enter your recurrence details and click **Apply Recurrence**
5. Enter your filtering criteria and click the magnifying glass to search for rooms
6. A list of open rooms will appear with the availability listed in the second column (see below 4/4 means the room is open for 4 out the 4 requested dates)
7. Click the **purple + icon** to add the room you wish to book.
8. Complete the reservation as outlined in Single Reservation above.
Cancelling a Reservation

1. Go to My Events
2. This will take you to your list of events.
3. Click on the Reservation Name you wish to cancel
4. Click either Cancel Reservation on the right side (cancels all bookings) OR
5. Click the cancel icon next to the booking (cancels that booking only)
6. You will be asked to confirm your cancellation

![Cancel Reservation dialog box]

- **Cancel Reason**: Cancelled
- **Cancel Notes**: no longer needed

[Options: Yes, Cancel Reservation, No, Keep Reservation]
Editing a Reservation

1. From your home page, click on **My Events**
2. Click on the **Reservation Name** you wish to edit

3. You can edit **Reservation Details** (Event Name, Event Type, Organization/Individual, First Contact) by clicking on the pencil icon next to the Reservation Details.
4. You can edit the **booking** by clicking on the pencil icon next to the booking.

5. You can select a new **Date**, **Time** or **Location** by using the search tools to the left.

6. If the room is open for your new date or time, click **Update Booking** to change your information.
Adding Services to an Existing Reservation

1. To add services to an existing booking, go to My Events
2. Select the Reservation Name to which you wish to add services
3. Click the Add Services link

4. Select the service and quantity you wish to add (A summary will display on the right of the screen)
5. Click Next Step

6. Identify the bookings to which you wish to add the service (for recurring reservations, you can add the service to multiple bookings at the same time).
Browsing in the Web App

Events
Browse events allows you to see all reservations in your organization. This will link you to a reservation calendar.
If you click on a reservation, you will get details about that reservation including any related booking (other rooms booked or future occurrences of a recurring reservation).
Locations
Location will show you a free/busy of all spaces.