



Web App Reference Guide for EMS

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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).

Event Types

Event Type	Definition
Event Type	For use by special events
Celebration	For use by special events

Statuses for Reservations

Status	Definition
Approved	(Internal/Nonprofit) – Space booked
Cancelled	Booking is no longer happening, space is released.
Conflict	Used when two people book the same space at the same time to allow someone to change one booking.
Denied	Does not meet policy for reserving space.
Pending – Information needed	More information from user has been requested, pending approval, based on information received from user.
Pending Approval	All reservations, once entered, go into this category. This category will hold a reservation until approved or denied.
Pending Approval from FSL	Used for Worth Hills outdoor space. All outdoor Worth Hills space will be approved by the Office of Fraternity & Sorority Life
Pending Approval from Conf. Svcs.	Status for an event that must be moved over to Conference Services for event approval.
Pending Sadler Approval	Used for spaces at Sadler Hall that must be approved by Campus Life for use.

Navigating the EMS Web App

Your EMS Web App home page looks like below.

- 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
- 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.
- Below that is a list of your bookings for the day along with a search option to find your reservations.
- Finally, in the upper right-hand corner, you see your name and a drop-down for your account options.

The screenshot shows the EMS Web App interface. A red box labeled '1' highlights the left-hand menu bar containing links for HOME, CREATE A RESERVATION, MY EVENTS, BROWSE, EVENTS, LOCATIONS, and PEOPLE. Another red box labeled '2' highlights the 'My Reservation Templates' section, which lists three templates: Conference Room, Event Space, and Nonprofit Conference Room Meeting, each with 'book now' and 'about' buttons. A third red box labeled '3' highlights the 'My Bookings' section for July 8, 2016, showing a table of reservations. A fourth red box labeled '4' highlights the top right corner showing the user's name 'Sara Rae' and a dropdown arrow.

1 **ems** Virtual EMS **4** Sara Rae

2 MY HOME
My Reservation Templates

Conference Room	book now	about
Event Space	book now	about
Nonprofit Conference Room Meeting	book now	about

3 My Bookings
JULY 8, 2016 SEARCH (Eastern Time [ET])

Time	Event	Location	Status	Action
11:00 AM - 1:00 PM	Covenant Bible Study	Richardson Conference Ro...	Confirmed	
1:00 PM - 3:00 PM	tester	Chambers Conference Ro...	Confirmed	
2:00 PM - 4:00 PM	meet with ss	Bessant Conference Room	Confirmed	Cancel

Making Reservations

Single Reservation

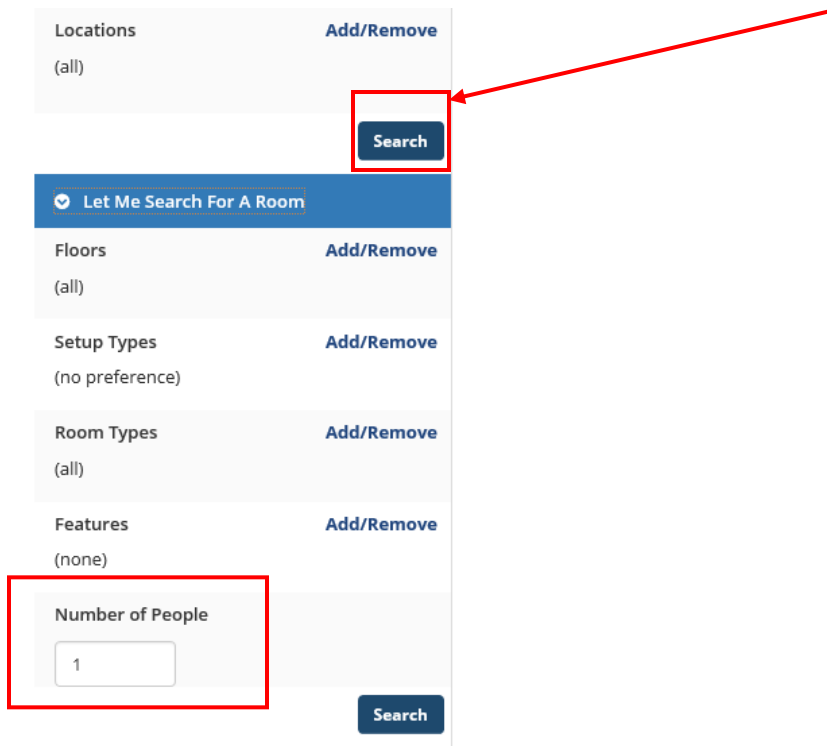
1. To make a reservation, begin at either **My Home** or **Create Reservation**
2. Click **book now** next to the template you wish to use
 - ***NOTE** – The templates are designed for different kinds of bookings. Use the one that best matches your reservation needs. The **about** button will tell you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

The screenshot shows the 'MY HOME' page. Under 'My Reservation Templates', there are three options: 'Conference Room', 'Event Space', and 'Nonprofit Conference Room Meeting'. Each has a 'book now' button and an 'about' button. The 'Conference Room' template is highlighted with a red box. Below this is the 'My Bookings' section for 'JULY 8, 2016'. It shows a calendar view with three bookings: 'Covenant Bible Study' in the 'Richardson Conference Ro...' at 11:00 AM - 1:00 PM, 'tester' in the 'Chambers Conference Ro...' at 1:00 PM - 3:00 PM, and 'meet with ss' in the 'Bessant Conference Room' at 2:00 PM - 4:00 PM. All are 'Confirmed'. A 'Cancel' button is visible for the last booking.

3. Select your date and time

The screenshot shows the 'New Booking for Fri Jul 8, 2016' form. A red box highlights the 'Date & Time' section, which includes fields for 'Date' (Fri 07/08/2016), 'Start Time' (8:30 AM), 'End Time' (9:30 AM), and a dropdown for 'Create booking in this time zone' (Eastern Time). A red arrow points from this section to a modal window titled 'Date & Time'. The modal shows the date 'Tue 07/19/2016', 'Start Time' (8:30 AM), 'End Time' (9:30 AM), and the same time zone dropdown. The modal is also highlighted with a red box.

4. Select any filters to limit the number of rooms returned.
 5. Enter the **Number of People** to find a room that will best fit the size of your meeting.
 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



Locations (all) [Add/Remove](#)

Search

Let Me Search For A Room

Floors (all) [Add/Remove](#)

Setup Types (no preference) [Add/Remove](#)

Room Types (all) [Add/Remove](#)

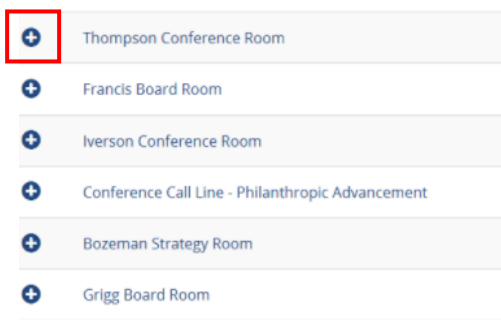
Features (none) [Add/Remove](#)

Number of People

1

Search

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



+ Thompson Conference Room

+ Francis Board Room

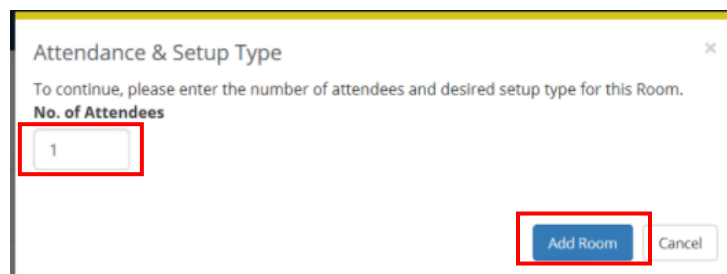
+ Iverson Conference Room

+ Conference Call Line - Philanthropic Advancement

+ Bozeman Strategy Room

+ Grigg Board Room

8. Enter the number of attendees and desired setup (if prompted)
9. Click **Add Room**



Attendance & Setup Type

To continue, please enter the number of attendees and desired setup type for this Room.

No. of Attendees

1

Add Room Cancel

10. You can click the **Next Step** button at the top right of the screen to add services
***NOTE** – You can click on **3 Reservation Details** if you want to skip adding services

Conference Room ⓘ

1 Rooms & Attendees 2 Services 3 Reservation Details

My Cart (1) Create Reservation

Services For Your Reservation

Next Step

Set-ups Services Summary

11. 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).
 12. Click **OK** when done adding the resource

Flipchart Paper ⓘ

- 0 +

Special Instructions

OK Cancel

13. A summary of your services will build on the right side of the screen

Services Summary

Set-ups

6 Coffee Set-up

Conference Room Catering, 8:30 AM - 9:30 AM, Drop Off

1 Energy Cafe
Dropping off food

Building Equipment

1 Flipchart Paper

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

Conference Room ⓘ

1 Rooms & Attendees 2 Services 3 Reservation Details

My Cart (1) Create Reservation

Services For Your Reservation

Next Step

Set-ups Services Summary

15. Enter your **Event Details**

***NOTE** – Anything with an ‘*’ next to it is a required field.

16. **Calendaring Details** = Outlook details. This information will be displayed on your Outlook calendar and will be included in any invitation sent out to Outlook attendees (see [Adding Outlook Attendees](#)).

- a. **Add this reservation to my calendar:** This will add the reservation to your Outlook calendar. If unchecked, it will not be linked or added to your Outlook calendar.
- b. **Private:** Marks the reservation as a private reservation in Outlook
- c. **Subject:** Subject of your Outlook reservation/invitation
- d. **Show Time As:** How your time will display on Outlook
- e. **Reminder:** Set an Outlook reminder
- f. **Message:** The message in the body of your Outlook reservation/invitation
- g. **Attach File:** This file will be attached to your Outlook reservation/invitation

Event Details

Event Name *

Internal Staff Meeting

Event Type *

Staff Only Daytime

Calendaring Details

☐ Add this reservation to my calendar
☐ Private

Subject

Internal Staff Meeting

Show Time As

Busy

Reminder

(none)

Message

Attach File

Select your files

Drag and drop your files here

17. Add the **Organization/Individual** Details – this is who will be hosting the event.
 - a. 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 the Organization/Individual)

Organization/Individual Details

Organization/Individual *

Sara Rae

▼

Q

1st Contact

Sara Rae

▼

Q

1st Contact Phone *

704-973-4500

1st Contact Fax

1st Contact Email Address *

srae@fftc.org

19. Add any additional information (questions will vary depending on the template chosen)
20. 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**

New Booking for Fri Jul 8, 2016 Next Step

Date & Time

Date: Fri 07/08/2016 Recurrence

Start Time: 8:30 AM End Time: 9:30 AM

Create booking in this time zone: Eastern Time

Selected Rooms

Your selected Rooms will appear here.

Attendees

Sara Rae

Find Attendee

Room Search Results

Rooms matching your search criteria will appear here.

Recurrence

Repeats: Weekly Remove Recurrence

Every: 1 week(s)

On: Sun Mon Tue Wed Thu Fri Sat

Start Date: Wed 07/13/2016

☐ End Date: Thu 07/14/2016

☒ End after: 5 occurrence(s)

Start Time: 1:00 PM End Time: 2:00 PM

Create Booking In: Eastern Time

Apply Recurrence Close

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 5/5 means the room is open for 5 out of the 5 requested dates)
7. Click the **blue + icon** to add the room you wish to book.

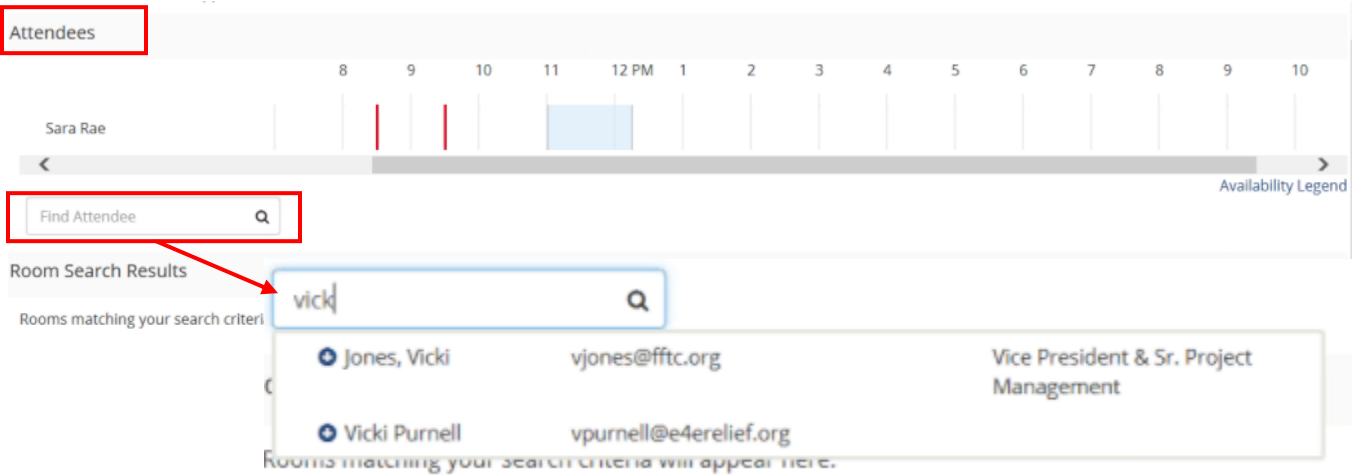
+	Thompson Conference Room	5/5	Foundation For The Carolinas	3rd Floor	ET	14	
+	Francis Board Room	5/5	Foundation For The Carolinas	4th Floor	ET	14	
+	Iverson Conference Room	5/5	Foundation For The Carolinas	4th Floor	ET	10	
+	Conference Call Line - Philanthropic Advancement	5/5	Foundation For The Carolinas	Basement	ET	99	
+	Bozeman Strategy Room	5/5	Foundation For The Carolinas	Mezzanine	ET	10	
+	Grigg Board Room	4/5	Foundation For The Carolinas	3rd Floor	ET	38	

8. Complete the reservation as outlined in [Single Reservation](#) above.

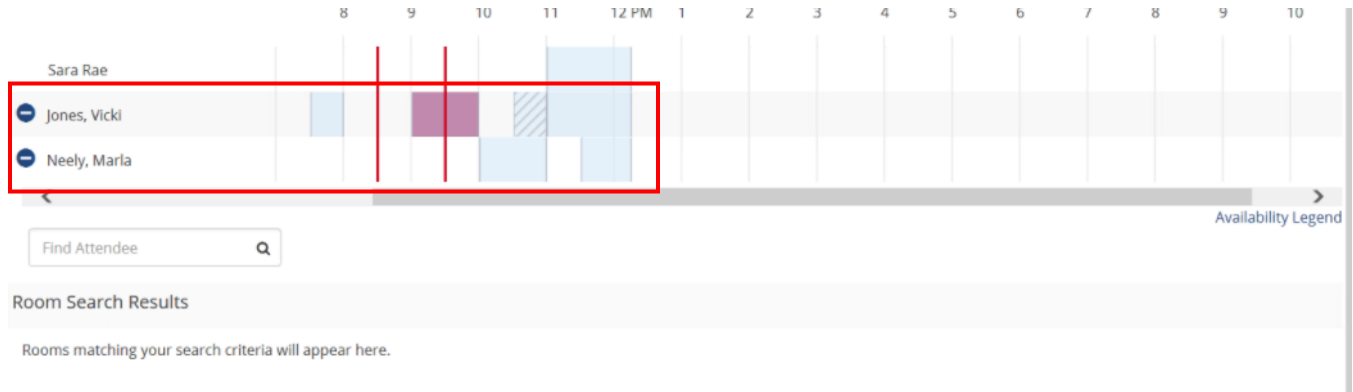
Adding Outlook Attendees

1. When creating a reservation, you can add Outlook attendees from the Web App
2. Begin your reservation as outlined in [Making Reservations](#)
3. Under **Attendees** (on the main page, to the left of the date/time), start typing in the **Find Attendee** box and a list of matches will auto-fill below (this is pulling from YOUR Outlook address book)

4. Select your attendee by clicking the **blue + sign** next to the attendee name

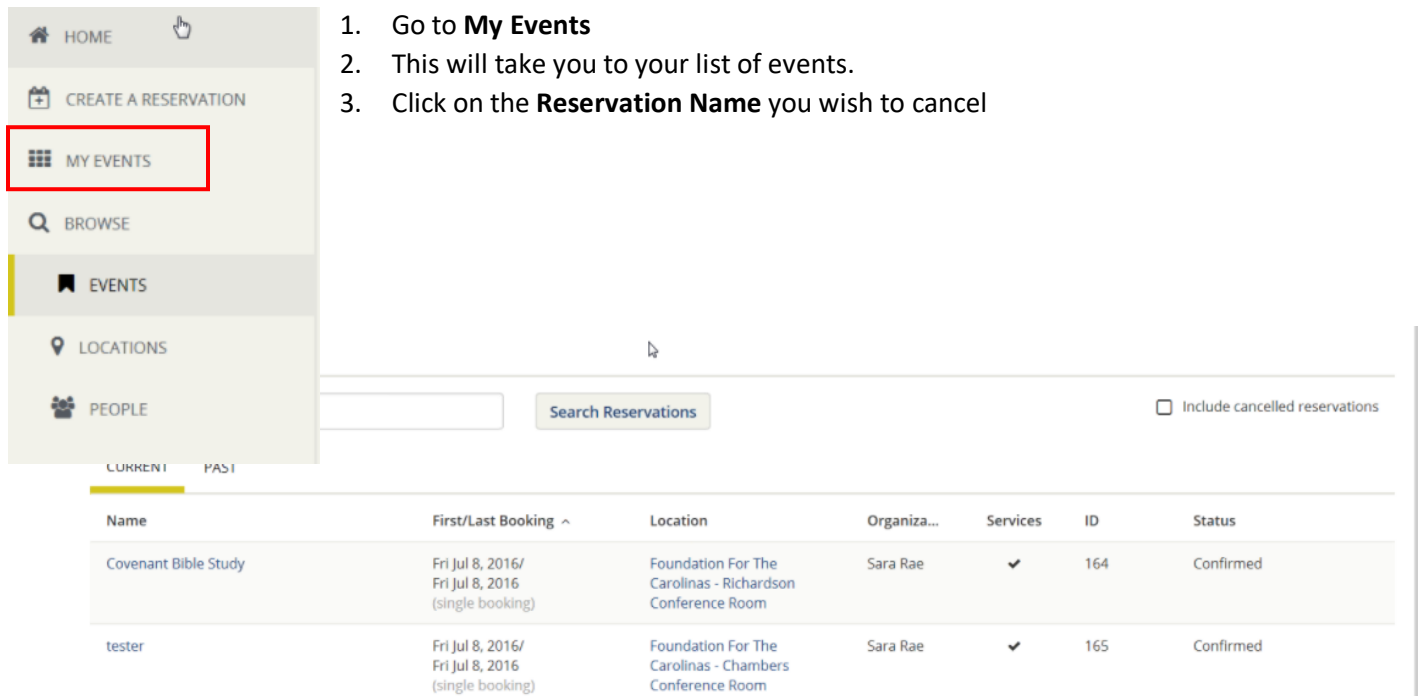


5. Once you've added attendees, you will see their free/busy (as long as they are a part of FFTC) along with the times of your meeting.



6. Continue making the reservation as outlined in [Making Reservations](#) ([single](#) or [recurring](#))
7. Outlook invitations will be sent to all attendees added to the meeting.
8. The Outlook appointment will be added to your calendar.
- *NOTE** – Outlook attendees will receive an update if you edit the date, time or location of your booking. They will also receive a cancellation notice if you cancel the booking.

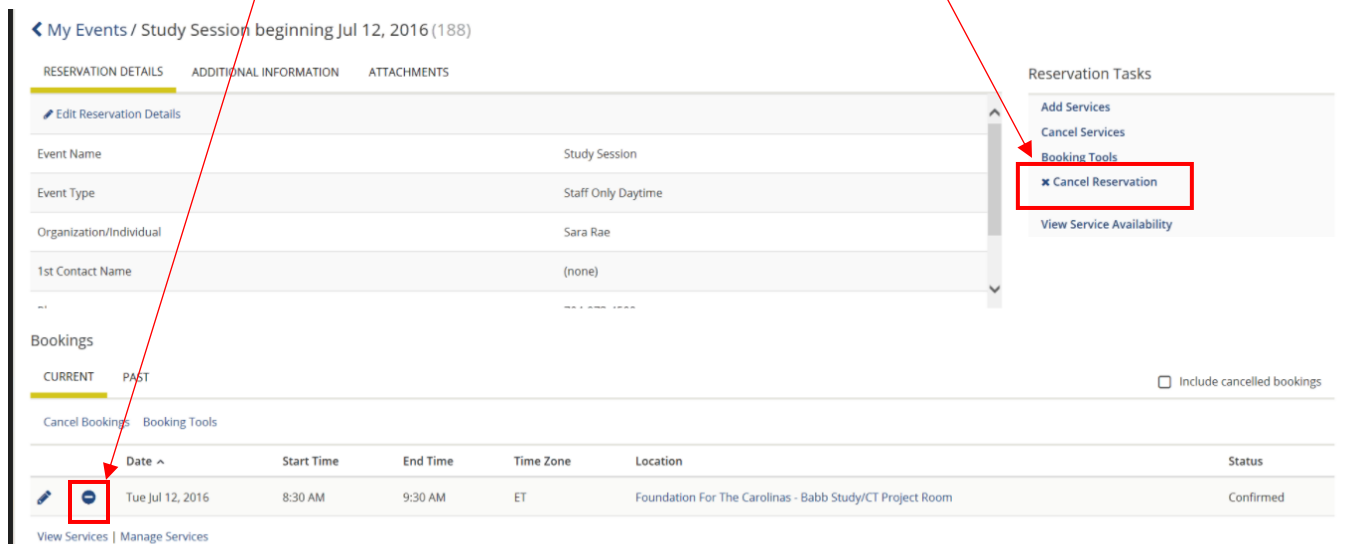
Cancelling a Reservation



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

Name	First/Last Booking ^	Location	Organiza...	Services	ID	Status
Covenant Bible Study	Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking)	Foundation For The Carolinas - Richardson Conference Room	Sara Rae	✓	164	Confirmed
tester	Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking)	Foundation For The Carolinas - Chambers Conference Room	Sara Rae	✓	165	Confirmed

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)



< My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS | ADDITIONAL INFORMATION | ATTACHMENTS

Edit Reservation Details

Event Name	Study Session
Event Type	Staff Only Daytime
Organization/Individual	Sara Rae
1st Contact Name	(none)

Bookings

CURRENT | PAST

Cancel Bookings | Booking Tools

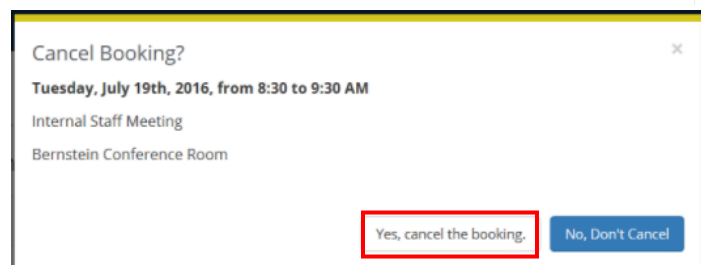
Date ^	Start Time	End Time	Time Zone	Location	Status
Tue Jul 12, 2016	8:30 AM	9:30 AM	ET	Foundation For The Carolinas - Babb Study/CT Project Room	Confirmed

View Services | Manage Services

Reservation Tasks

- Add Services
- Cancel Services
- Booking Tools
 - Cancel Reservation**
 - View Service Availability

6. You will be asked to confirm your cancellation



Cancel Booking?

Tuesday, July 19th, 2016, from 8:30 to 9:30 AM

Internal Staff Meeting

Bernstein Conference Room

Yes, cancel the booking. No, Don't Cancel

Editing a Reservation

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

RESERVATIONS

BOOKINGS

Search Reservations

☐ Include cancelled reservations

CURRENT

PAST

Name	First/Last Booking ^	Location	Organiza...	Services	ID	Status
Covenant Bible Study	Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking)	Foundation For The Carolinas - Richardson Conference Room	Sara Rae	✓	164	Confirmed
tester	Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking)	Foundation For The Carolinas - Chambers Conference Room	Sara Rae	✓	165	Confirmed
meet with ss	Fri Jul 8, 2016/ Fri Jul 8, 2016 (single booking)	Foundation For The Carolinas - Bessant Conference Room	Sara Rae		166	Confirmed
CHS	Mon Jul 11, 2016/ Mon Jul 11, 2016 (single booking)	Foundation For The Carolinas - Francis Board Room	Test User	✓	167	Confirmed
tester	Wed Jul 20, 2016/ Wed Jul 20, 2016 (multi-booking)	Multiple	Sara Rae	✓	156	Confirmed
Tester	Wed Jun 21, 2017/ Wed Jun 21, 2017 (single booking)	Foundation For The Carolinas - Richardson Conference Room	Sara Rae		160	Confirmed

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.

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS

ADDITIONAL INFORMATION

ATTACHMENTS

✎ Edit Reservation Details

Event Name

Study Session

Event Type

Staff Only Daytime

Organization/Individual

Sara Rae

1st Contact Name

(none)

Reservation Tasks

Add Services

Cancel Services

Booking Tools

✕ Cancel Reservation

View Service Availability

4. You can edit the booking by clicking on the pencil icon next to the booking.

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Edit Reservation Details

Event Name

Study Session

Event Type

Staff Only Daytime

Organization/Individual

Sara Rae

1st Contact Name

(none)

...

Bookings

CURRENT

PAST

☐ Include cancelled bookings

Cancel Bookings

Booking Tools

Date ^	Start Time	End Time	Time Zone	Location	Status
<div><div><div></div></div></div> Tue Jul 12, 2016	8:30 AM	9:30 AM	ET	Foundation For The Carolinas - Babb Study/CT Project Room	Confirmed

View Services | Manage Services

Reservation Tasks

Add Services

Cancel Services

Booking Tools

✕

Cancel Reservation

View Service Availability

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.

Edit Booking Tue Jul 12, 2016

Update Booking

Event Details

Event Name *

Study Session

Event Type *

Staff Only Daytime

Date & Time

Date

Tue 07/12/2016

Start Time

9:30 AM

End Time

10:30 AM

Create booking in this time zone

Eastern Time

Room Search Results

Attendance & Setup Type

LIST

SCHEDULE

☐ Favorite Rooms only.

7 AM

8

9

10

11

12 PM

1

2

3

4

5

6

7

8

9

10

Find A Room

Search

Rooms You Can Reserve

Foundation For The Car... Cap

7 AM

8

9

10

11

12 PM

1

2

3

4

5

6

7

8

9

10

Babb Study/CT Proje...

5

Study Ses

Closed

Update Booking

Cancel

Availability Legend

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

My Events / Study Session beginning Jul 12, 2016 (188)

RESERVATION DETAILS ADDITIONAL INFORMATION ATTACHMENTS

Edit Reservation Details

Event NameStudy Session

Event TypeStaff Only Daytime

Organization/IndividualSara Rae

1st Contact Name(none)

...

Reservation Tasks

Add Services

Cancel Services

Booking Tools

✕ Cancel Reservation



View Service Availability

Bookings

CURRENT PAST

☐ Include cancelled bookings

Cancel Bookings Booking Tools

	Date ^	Start Time	End Time	Time Zone	Location	Status
 	Tue Jul 12, 2016	8:30 AM	9:30 AM	ET	Foundation For The Carolinas - Babb Study/CT Project Room	Confirmed

[View Services](#) | [Manage Services](#)

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

Study Session (188)

Select Services

Rental Notes

Conference Room Catering

Services Summary

Building Equipment

1 Whiteboard / Easel

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).

Select Services / Study Session (188)

Add Services

☒

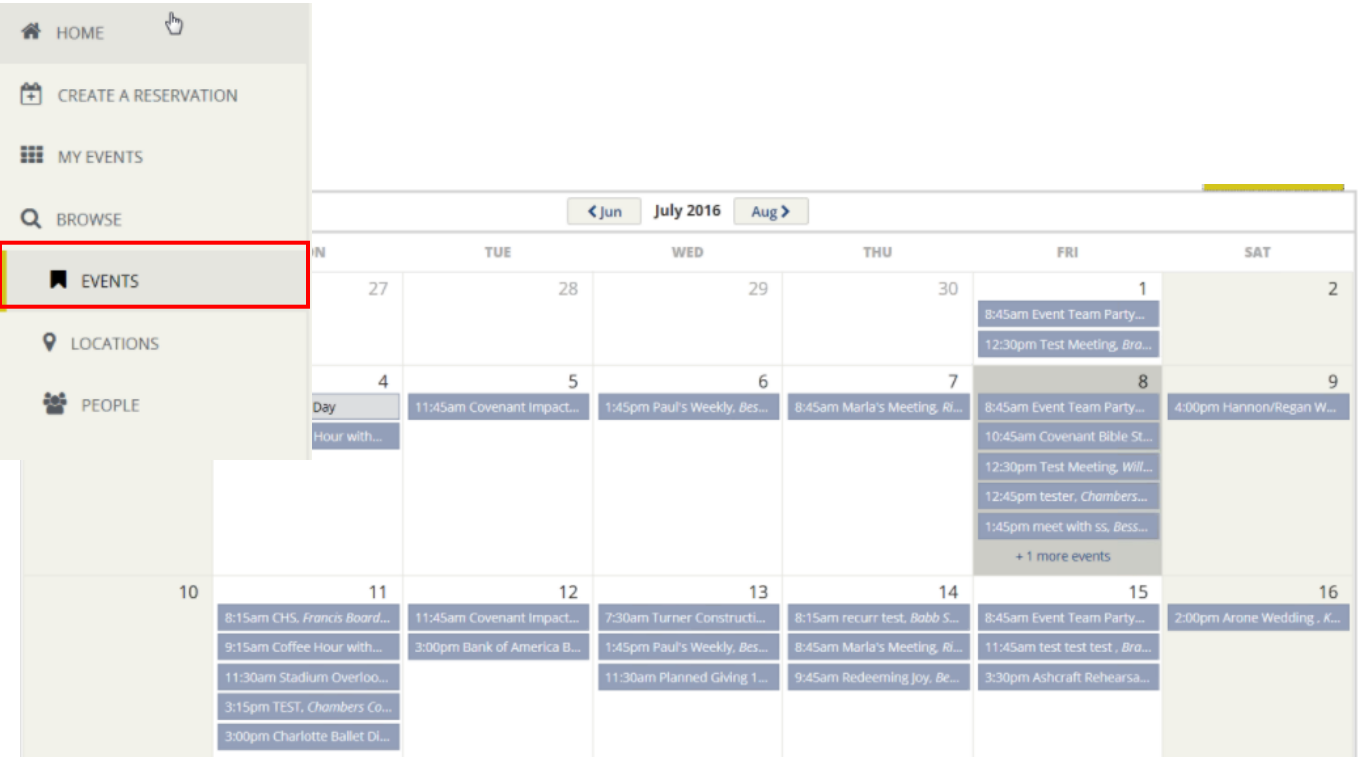
Date ^	Booking Time	Time Zone	Location	Event Name	Event Type	Result
<input checked="" type="checkbox"/>	Tue Jul 12, 2016	9:30 AM - 10:30 AM	Eastern Time	Babb Study/CT Project Room	Study Session	Staff Only Daytime

Add Services

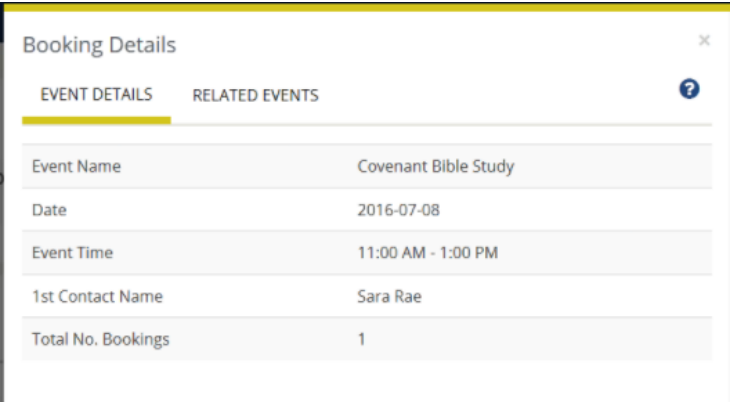
Browsing

Events

Browse events allows you to see all reservations in your organization. This will link you to a reservation calendar.

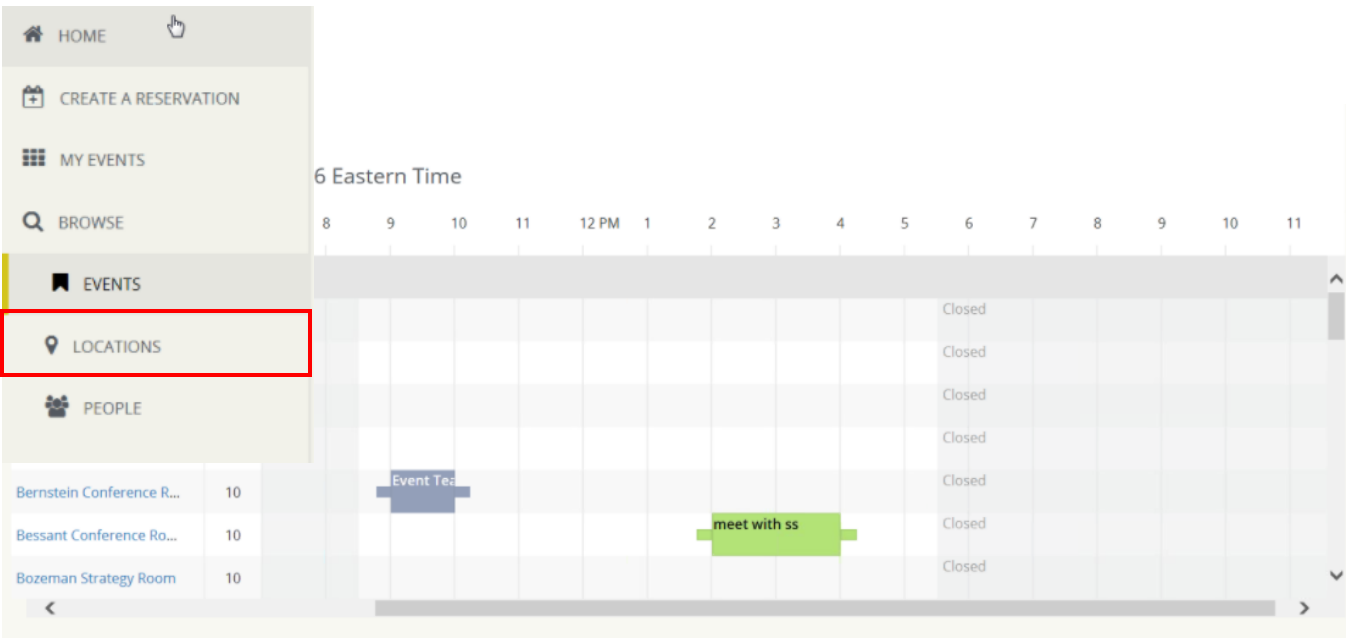


If you click on a reservation, you will get details about that reservation including any related booking (other rooms booked or future occurrences of a recurring reservation).



Locations

Location will show you a free/busy of all spaces.



You can make a reservation from any open spot by clicking on the start time of an open slot. Select your Template, set the End Time, and click continue to complete the reservation.

