

This guide is meant to be a quick reference only. Full explanations of all steps are included in more detail in the *EMS User Manual* on <https://www.ship.edu/about/offices/web/ems/>. Access to EMS is now a desktop client.

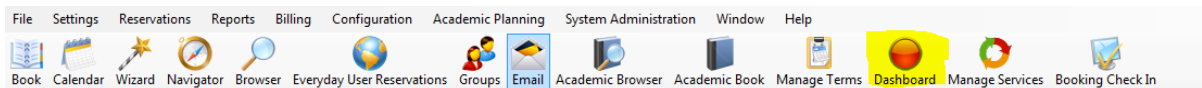
**NOTE:** Do not use VirtualEms (events.ship.edu) for scheduling events in spaces where you have approval status. This will delete the reservation completely.

## OVERVIEW

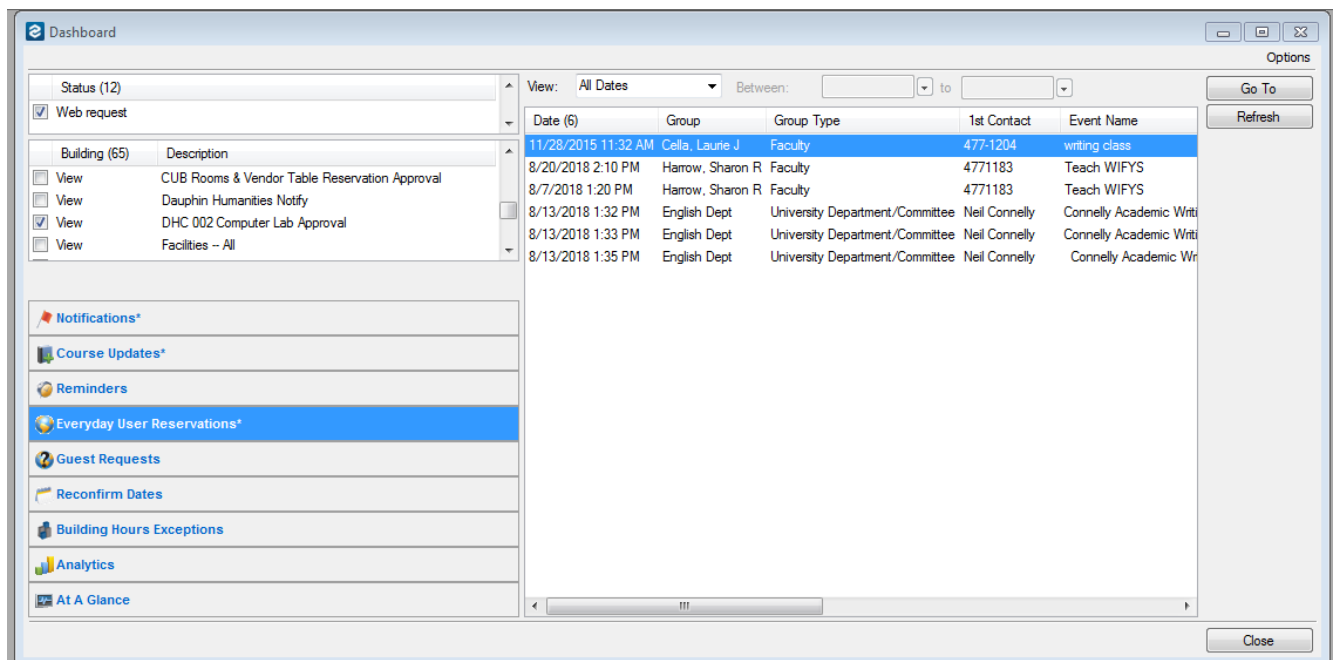
1. Open a Request (or Notification) from the Dashboard
2. Approve, Deny, or Cancel a Request
3. Send a Confirmation Email
4. Mark Notification as Reviewed
5. Create a Single Day Reservation from the Book
6. Add Furniture or Other Resources

### 1. Open a Request from the Dashboard:

- Open the Dashboard button to review all web reservations and notifications that are awaiting approval.

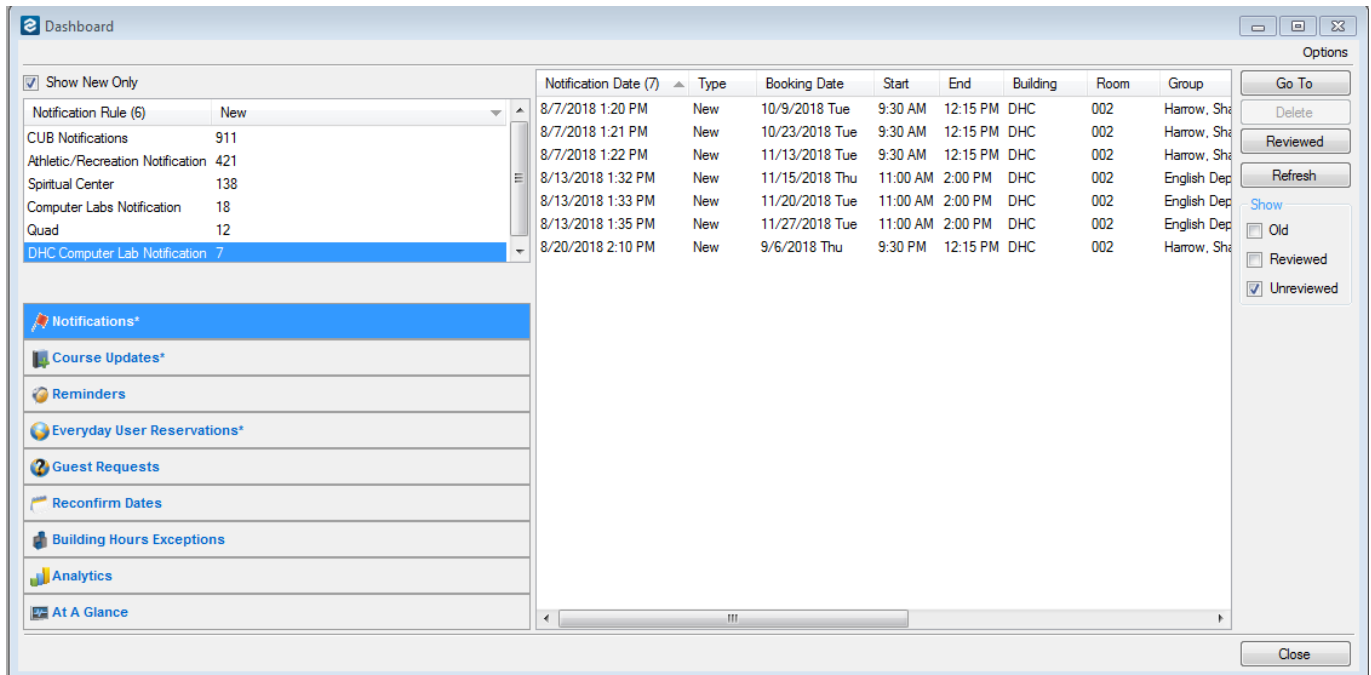


- **Everyday User Reservations:** The left-hand window will display all available statuses and all areas/buildings/views. Select “Web Request” status and select the areas/buildings/views you are responsible for to see a list of new requests. See sample screen shot below.



Date (6)	Group	Group Type	1st Contact	Event Name
11/28/2015 11:32 AM	Cela, Laurie J.	Faculty	477-1204	writing class
8/20/2018 2:10 PM	Harrow, Sharon R.	Faculty	4771183	Teach WIFYS
8/7/2018 1:20 PM	Harrow, Sharon R.	Faculty	4771183	Teach WIFYS
8/13/2018 1:32 PM	English Dept	University Department/Committee	Neil Connelly	Connelly Academic Writ
8/13/2018 1:33 PM	English Dept	University Department/Committee	Neil Connelly	Connelly Academic Writ
8/13/2018 1:35 PM	English Dept	University Department/Committee	Neil Connelly	Connelly Academic Writ

- **Notifications:** The left-hand window will display each notification rule and the number of new notifications that are applicable to each notification rule. Select a notification rule to see the new notifications. See sample screen shot below.



The screenshot shows the EMS Desktop Client Event Scheduling interface. The left-hand window displays a list of notification rules and their corresponding number of new notifications. The right-hand window displays a table of notifications for the selected rule, 'DHC Computer Lab Notification'.

**Notification Rule (6)**

Notification Rule (6)	New
CUB Notifications	911
Athletic/Recreation Notification	421
Spiritual Center	138
Computer Labs Notification	18
Quad	12
<b>DHC Computer Lab Notification</b>	<b>7</b>

**Notifications\***

- Course Updates\*
- Reminders
- Everyday User Reservations\*
- Guest Requests
- Reconfirm Dates
- Building Hours Exceptions
- Analytics
- At A Glance

**Notification Details Table:**

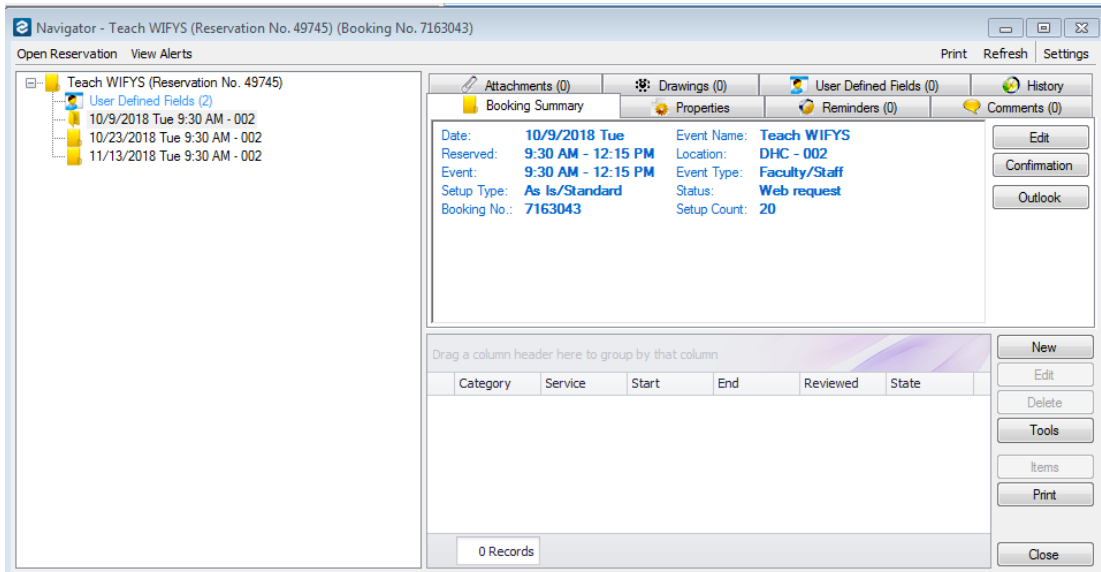
Notification Date (7)	Type	Booking Date	Start	End	Building	Room	Group
8/7/2018 1:20 PM	New	10/9/2018 Tue	9:30 AM	12:15 PM	DHC	002	Harrow, Sh
8/7/2018 1:21 PM	New	10/23/2018 Tue	9:30 AM	12:15 PM	DHC	002	Harrow, Sh
8/7/2018 1:22 PM	New	11/13/2018 Tue	9:30 AM	12:15 PM	DHC	002	Harrow, Sh
8/13/2018 1:32 PM	New	11/15/2018 Thu	11:00 AM	2:00 PM	DHC	002	English Dep
8/13/2018 1:33 PM	New	11/20/2018 Tue	11:00 AM	2:00 PM	DHC	002	English Dep
8/13/2018 1:35 PM	New	11/27/2018 Tue	11:00 AM	2:00 PM	DHC	002	English Dep
8/20/2018 2:10 PM	New	9/6/2018 Thu	9:30 PM	12:15 PM	DHC	002	Harrow, Sh

**Options:**

- Go To
- Delete
- Reviewed
- Refresh
- Show
- Old
- Reviewed
- ☒ Unreviewed

Close

- Double-click on the room request in the right-hand window to open the reservation in the Navigator.



Navigator - Teach WIFYS (Reservation No. 49745) (Booking No. 7163043)

Open Reservation View Alerts

Print Refresh Settings

Attachments (0) Drawings (0) User Defined Fields (0) History

Booking Summary Properties Reminders (0) Comments (0)

Date: 10/9/2018 Tue Event Name: Teach WIFYS  
Reserved: 9:30 AM - 12:15 PM Location: DHC - 002  
Event: 9:30 AM - 12:15 PM Event Type: Faculty/Staff  
Setup Type: As Is/Standard Status: Web request  
Booking No.: 7163043 Setup Count: 20

Edit  
Confirmation  
Outlook

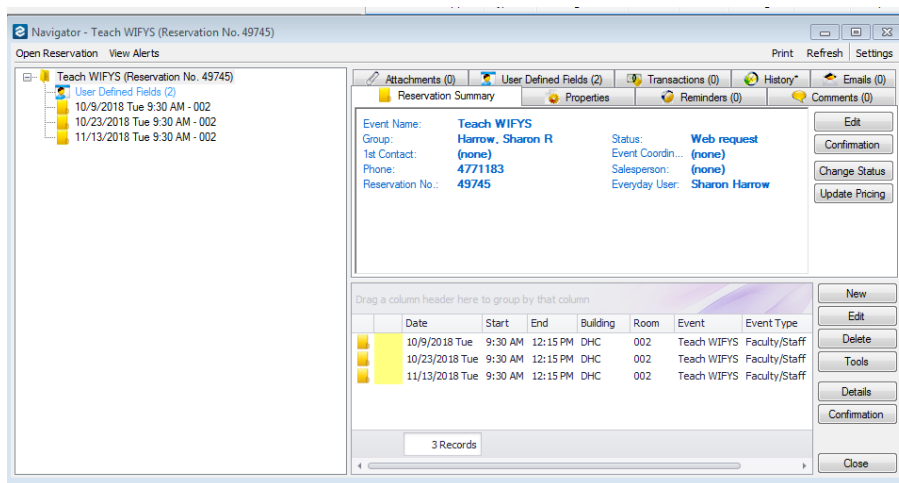
Drag a column header here to group by that column

Category	Service	Start	End	Reviewed	State
0 Records					

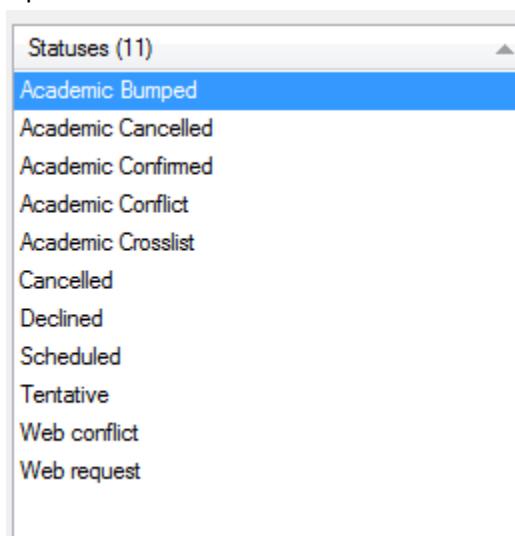
New  
Edit  
Delete  
Tools  
Items  
Print  
Close

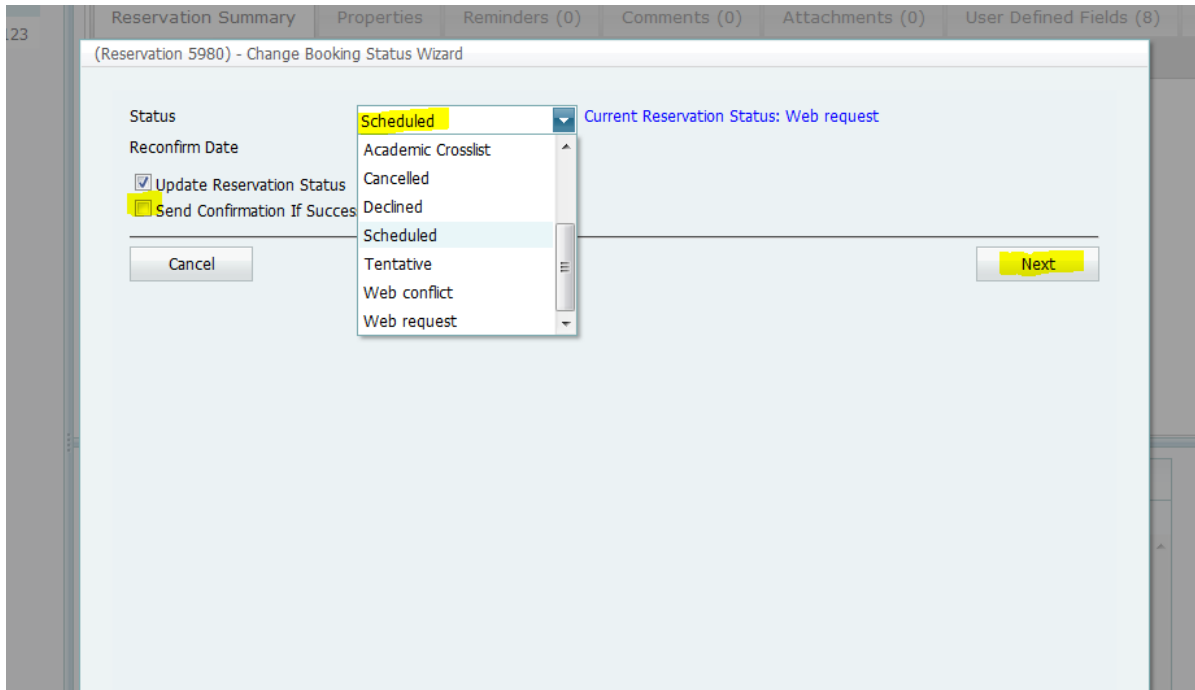
2. **Approve, deny, or cancel a request from the Navigator:**

- Review the service details added to the room request to determine if additional time is needed.
- Review the events scheduled in rooms around this request and determine if this request is suitable.
- Select the Reservation level of the reservation. This is the top layer in the left-hand pane just like in the image above.
- Click the Change Status button located on the right side of the Navigator window.
- Choose the appropriate status for this request.

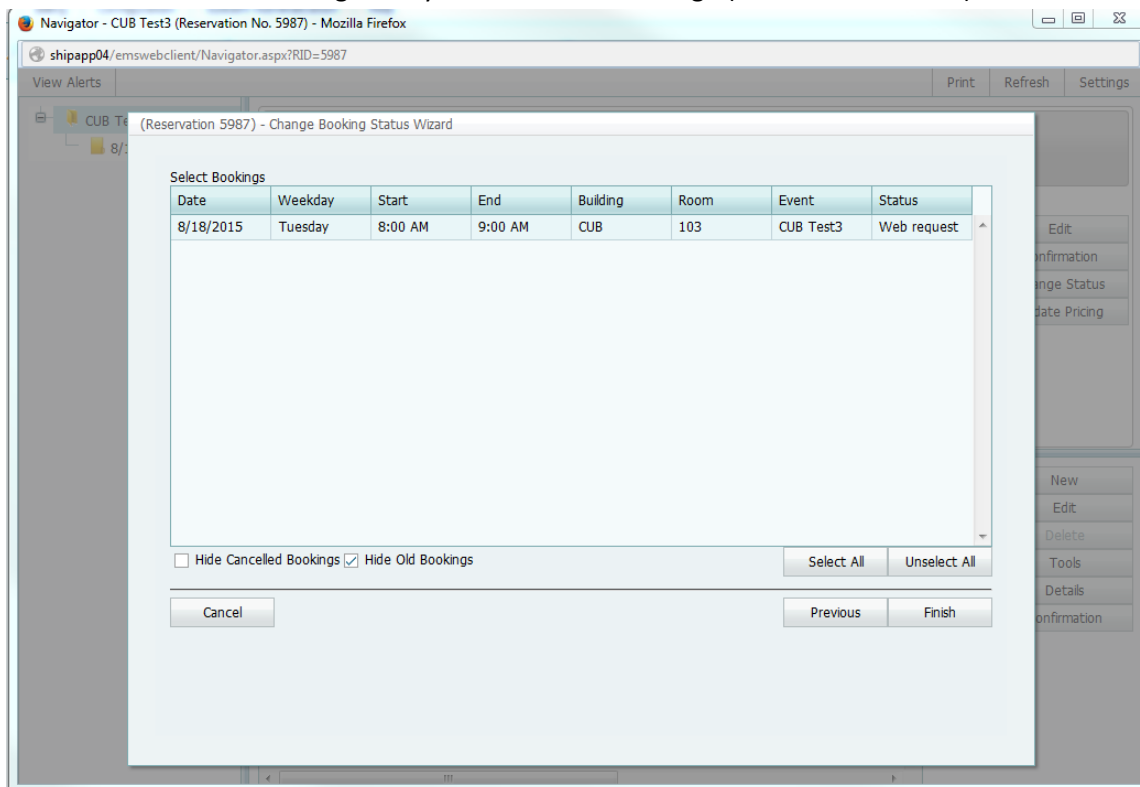


- Options are



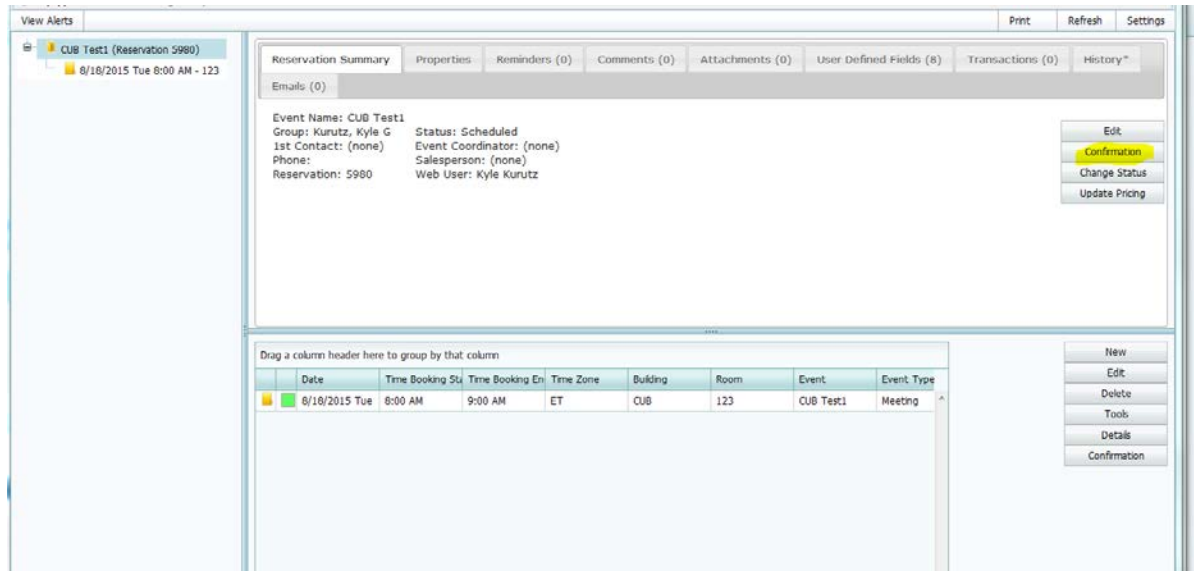


- Select the individual bookings that you would like to change (screen show below). Click Finish.

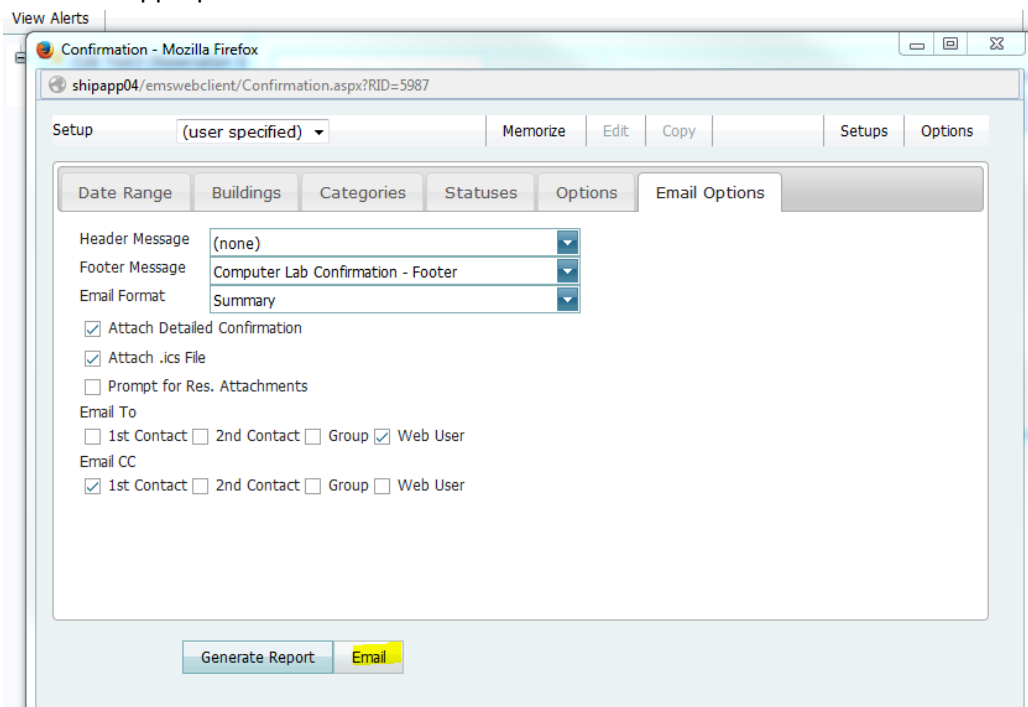


### 3. Send a Confirmation Email

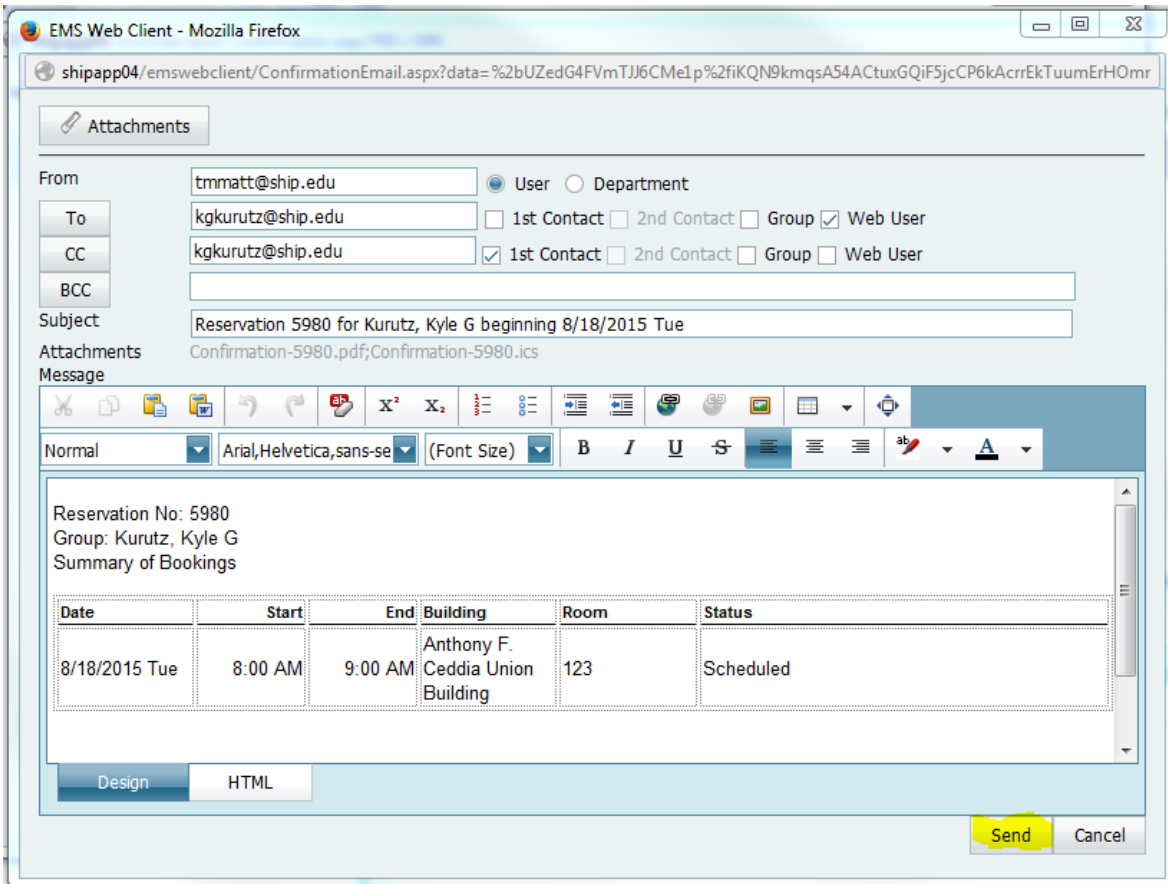
- Select the Reservation level of the reservation. This is the top layer in the left-hand pane of the Navigator.
- Click the Confirmation button on the right side of the Navigator window.



- Do one of these things:
  - a. Select a pre-configured (“memorized”) confirmation from the Setup: dropdown menu in the top left corner of the window.
  - b. Visit each of the tabs (Date Range, Buildings, Categories, Statuses, Options, & Email Options) to select the appropriate information for this reservation. See screen shot below.



- Select email. It will show you a final preview. You can add message and cc others at this point. Review and select If information is correct.



EMS Web Client - Mozilla Firefox

shipapp04/emswebclient/ConfirmationEmail.aspx?data=%2bUZedG4FVmTJJ6CMe1p%2fiKQ9N9kmqsA54ACtuxGQiF5jcCP6kAcrrEkTuomErHOMr

Attachments

From: tmatt@ship.edu ☒ User ☐ Department

To: kgkurutz@ship.edu ☐ 1st Contact ☐ 2nd Contact ☐ Group ☒ Web User

CC: kgkurutz@ship.edu ☒ 1st Contact ☐ 2nd Contact ☐ Group ☐ Web User

BCC:

Subject: Reservation 5980 for Kurutz, Kyle G beginning 8/18/2015 Tue

Attachments: Confirmation-5980.pdf; Confirmation-5980.ics

Message

Normal Arial, Helvetica, sans-serif (Font Size) B I U

Reservation No: 5980  
Group: Kurutz, Kyle G  
Summary of Bookings

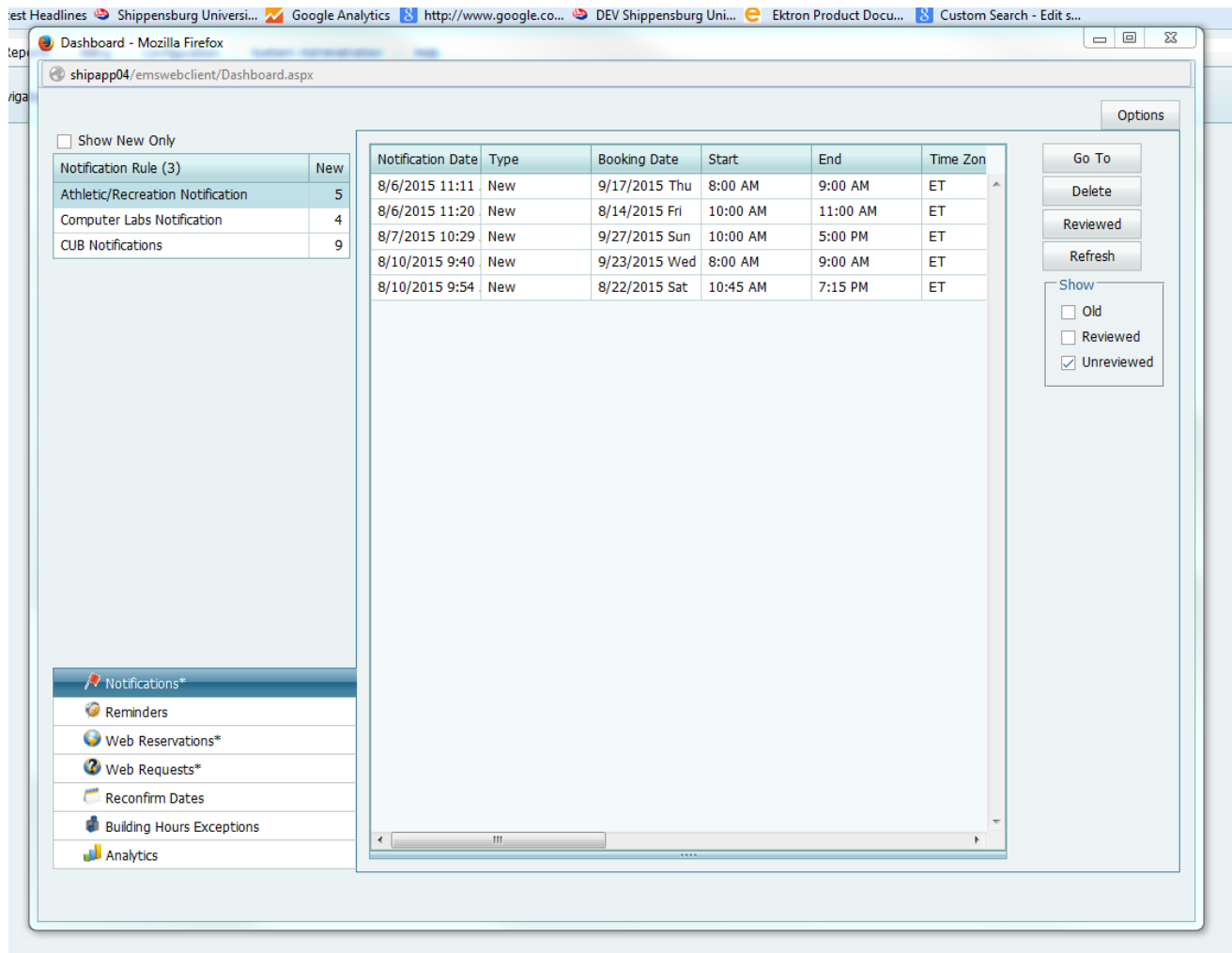
Date	Start	End	Building	Room	Status
8/18/2015 Tue	8:00 AM	9:00 AM	Anthony F. Ceddia Union Building	123	Scheduled

Design HTML

Send Cancel

#### 4. **Mark Notification as Reviewed in the Dashboard**

- Now that you are finished working on the reservation, close the reservation Navigator to return to the Dashboard.
- If you were working in the “Web Reservations” area of the dashboard, click *Refresh*. Requests that were processed will disappear from the list.
- If you were working in the “Notifications” area of the dashboard, highlight the room request you just responded to and click *Reviewed*.



Dashboard - Mozilla Firefox

shippapp04/emswebclient/Dashboard.aspx

☐ Show New Only

Notification Rule (3)	New
Athletic/Recreation Notification	5
Computer Labs Notification	4
CUB Notifications	9

Notification Date	Type	Booking Date	Start	End	Time Zone
8/6/2015 11:11	New	9/17/2015 Thu	8:00 AM	9:00 AM	ET
8/6/2015 11:20	New	8/14/2015 Fri	10:00 AM	11:00 AM	ET
8/7/2015 10:29	New	9/27/2015 Sun	10:00 AM	5:00 PM	ET
8/10/2015 9:40	New	9/23/2015 Wed	8:00 AM	9:00 AM	ET
8/10/2015 9:54	New	8/22/2015 Sat	10:45 AM	7:15 PM	ET

Options

Go To

Delete

Reviewed

Refresh

Show

☐ Old

☐ Reviewed

☒ Unreviewed

Notifications\*

Reminders

Web Reservations\*

Web Requests\*

Reconfirm Dates

Building Hours Exceptions

Analytics



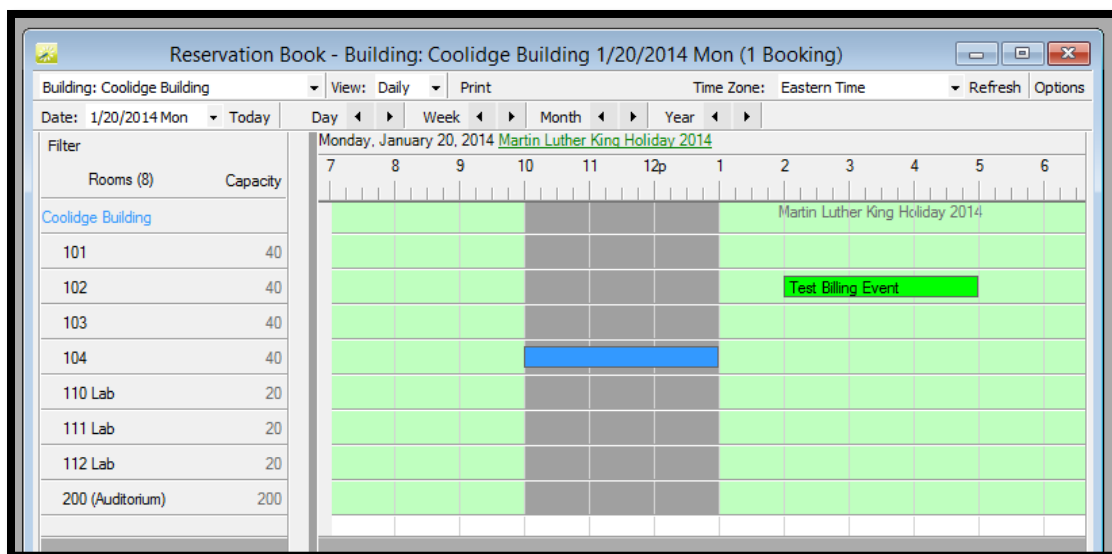
## 5. Create a Single Day Reservation from the Book

*Note: If you need to book multiple rooms and/or multiple days, use the Wizard instead of the Book. See the Tips section at the end of this document for information on the Wizard.*

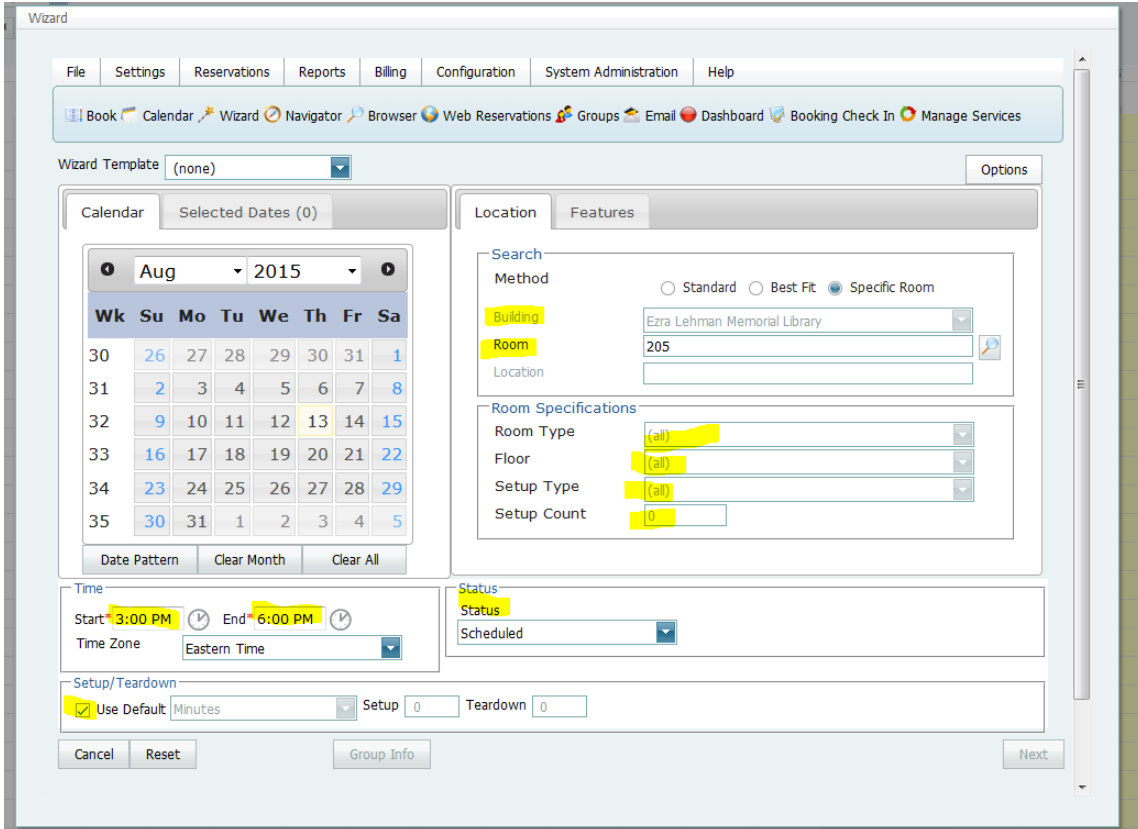
- Select the Book button from the toolbar



- In the book, on the row that represents the room you want to reserve, click on the time that you want the event to begin, and drag to the time you want the event to end.



- The Reservation Wizard window will open. Choose a status and click next.



The screenshot shows the 'Wizard' window for event scheduling. The interface includes a menu bar (File, Settings, Reservations, Reports, Billing, Configuration, System Administration, Help) and a toolbar with icons for Book, Calendar, Wizard, Navigator, Browser, Web Reservations, Groups, Email, Dashboard, Booking Check In, and Manage Services. The 'Wizard Template' is set to '(none)'. The 'Calendar' tab is active, showing a calendar for August 2015. The 'Location' tab is also visible, showing search criteria: Method (Standard, Best Fit, Specific Room), Building (Ezra Lehman Memorial Library), Room (205), and Location. The 'Room Specifications' section includes Room Type, Floor, Setup Type, and Setup Count. The 'Time' section shows Start (3:00 PM) and End (6:00 PM) times, with a Time Zone of Eastern Time. The 'Status' section shows a dropdown menu set to 'Scheduled'. The 'Setup/Teardown' section includes a checkbox for 'Use Default' and fields for Setup (0) and Teardown (0) minutes. At the bottom, there are buttons for Cancel, Reset, Group Info, and Next.

- Complete the reservation by indicating the event name, the group sponsoring the event, and other critical event information. Click *Finish*.

Reservation Wizard

Wizard Template: (none) Options

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Event

Event Name: Advisee Meeting VIP Event: ☐

Event Type: Meeting Source: Phone

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Group/Contacts

Group: Chemical Engineering

1st Contact: Carolyn Bertozzi Phone: 123.444.5555 Fax: Email Address: carolyn@mit.edu

Temp Contact:

Business Manager: (none) Phone: Fax: Email Address:

Temp Contact:

Room Setup Billing Other Virtual User Defined Fields

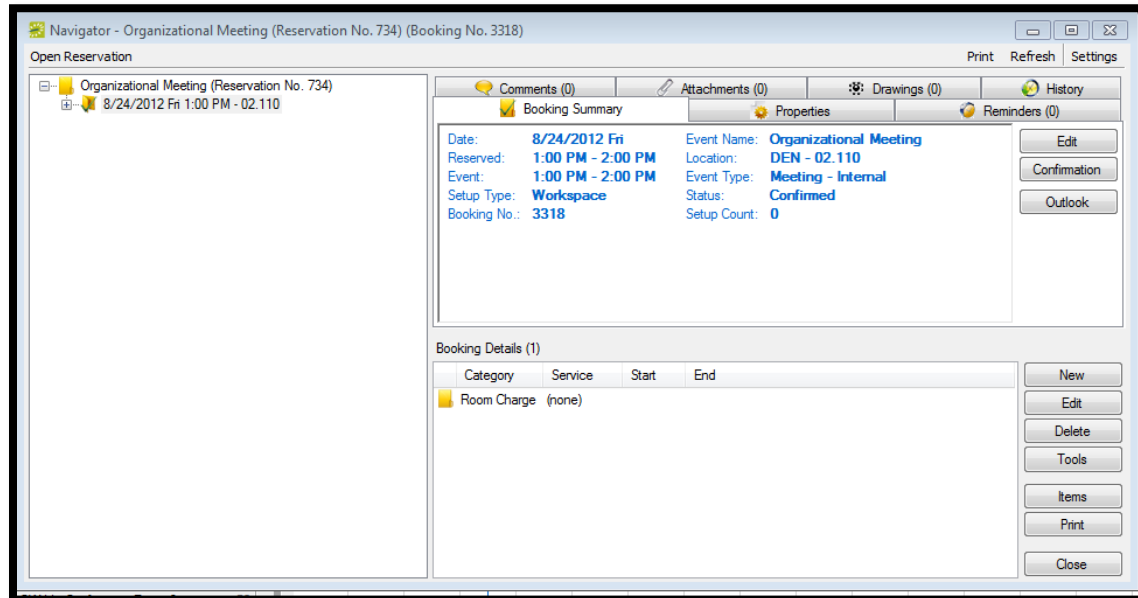
Setup Type: Classroom Style

Setup Count: 10

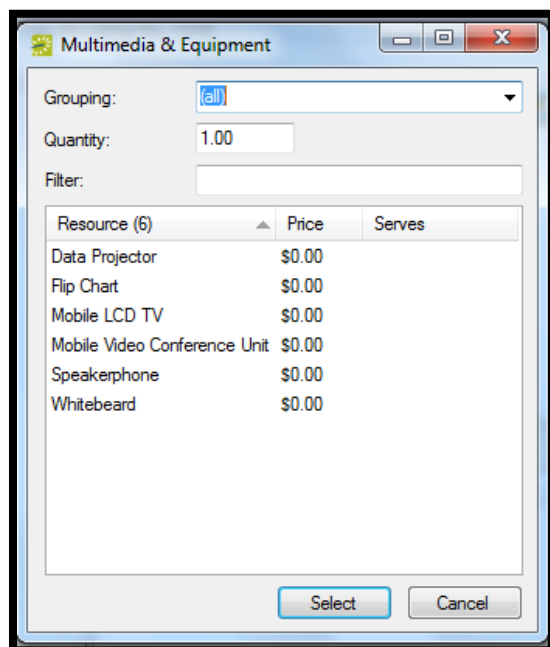
Cancel Group Info < Previous Finish

## 6. Add Furniture or Other Resources to an Event

- Select the booking level for the appropriate date and location that you would like to add a resource to.



- Click the New button in the bottom right-hand portion of the window and select the category of resources that you would like to add for this event.
- A pop up Resource Window will appear. In my example I selected Multimedia & Equipment.



- Select the item that you would like to add, insert the quantity in the quantity field, and click Select to add the item to this event.

**TIPS:**

**To Add Reservations directly into EMS:**

- Use *Wizard* to add a recurrence, a multi-room reservation or to search for specific availability by filter options:
  - o Standard Fit – EMS searches for room(s) that are available on ALL dates/times requested
  - o Best Fit – EMS find rooms that are available on one or more dates/times requested for you to mix and match rooms across dates requested
  - o Specific Room – You choose a specific room
- Use *Book* to add single day/single time reservations, if you find it easier than using the Wizard.

**To Search for existing reservations.**

- Use *Navigator* to open a recently closed reservation or to search by reservation number.
- Use *Browser* to supply filter criteria and receive a *list* of results.
- Use *Calendar* to supply filter criteria and receive a *grid* of results.
- Use *Groups Rolodex* to review reservations for a specific customer.
  - o Add comments to Groups to track important information of which all schedulers should be aware.
  - o Add attachments to Groups (e.g., insurance policies).
  - o Add reminders to Groups, such as when insurance policy expires.
  - o Add permanent contacts to Groups and set contact default, if desired.

**Within the Navigator:**

- Use Tools > Wizards to change a property (e.g., room, status, booking detail) on more than one booking at the same time.
- Use Comments to attach notes about why something was done.
- Use memorized Confirmations to make sending of Final Confirmations faster.

**All Users should set the following Options:**

- In Navigator > Settings > Options
  - o At a Glance > Check the following:
    - Reservation Reminders, Attachments, User Defined Fields, Comments.
    - Booking Reminders, Attachments, User Defined Fields, Comments.
- In Book > Options
  - o Automatically Refresh: Every 2, 5 or 10 Minutes (default is Never)
  - o Show '(all)' in Building List
  - o Review Tool Tip Display tab and check/uncheck items you would like to see or not see when you hover over an event in the Book

**Reports**

The following reports may be useful to run on a daily, weekly or as needed basis. Reports can be emailed, printed, memorized (saved).

- Setup Worksheet
- Events Schedule
- Memorize other reports as needed