
Virtual EMS User Guide

EMS Workplace Version 5.0

EMS Enterprise Version 5.0

Dean Evans & Associates, Inc.



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Introduction

Virtual EMS or VEMS is a web-based application that provides efficient facilities and services management by allowing customers, event attendees, and the general public to use a standard Internet browser to view real-time calendars and event schedules. When authorized, Virtual EMS users can also submit online requests and book space.

Use a web address or link (typically provided by the person or department that installed the software) to access Virtual EMS.

Note: Since one of the main benefits of VEMS is its high configurability, the fields, drop-down menus, toolbars, and screen captures documented here may not accurately reflect the application that you're using. In addition, some areas outlined below may only be available to you if you have a VEMS account.

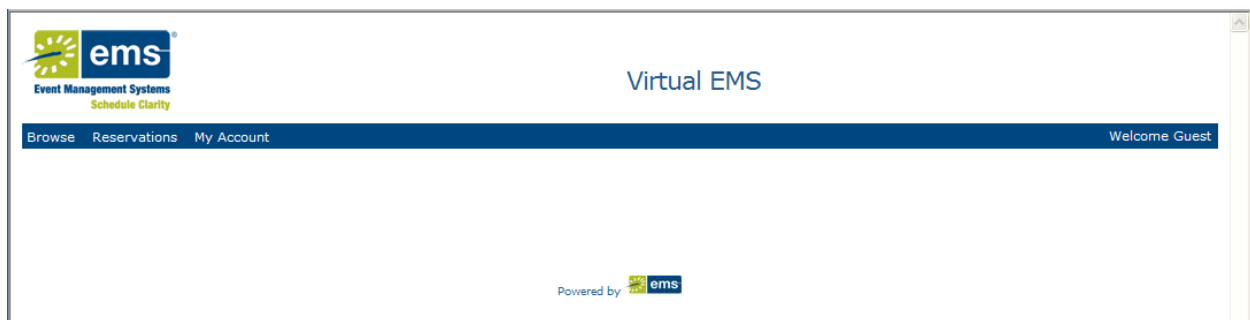


Figure 1 – Virtual EMS/Reservations Page

Login

If you have a VEMS account, you'll see the *Reservations* window when you first log in. It displays for the duration of your session.

Note: If you don't have a VEMS account, you may be allowed to create one. Please reference *Create an Account* on page 25.

1. At the site, select **My Account - Log In**.
2. Enter your **User ID** (network email address or network ID, depending on the environment) and **VEMS Password**.
3. Click **Login**.

After you log in, you will see toolbar options such as **Browse**, **Reservations**, and **My Account**.

Log Out

To log out of Virtual EMS, click the **Log Out** option.

- In Virtual EMS, click on **My Account - Log Out**.

Using Virtual EMS

Toolbar Dropdown Menus

When you first open Virtual EMS, you'll see three dropdown menus - **Browse**, **Reservations**, and **My Account**.

Browse

The Browse dropdown menu contains **Browse Events**, **Browse Facilities**, **Browse for Space**, and **Locate Group**.

Browse Events

The *Browse Events* window displays EMS events by day, week, or month.

To open the *Browse Events* page:

- Open VEMS and go to **Browse - Browse Events**.

To view events in list format:

- Click the **Daily List**, **Weekly List**, or **Monthly List** tab.

To sort the list based on a particular column:

- Click that column's heading.

To reverse the sort order:

- Click the heading again.

To view events in calendar format:

- Click the **Weekly Calendar** or **Monthly Calendar** tab.

To change the dates shown:

- Use the arrows on either side of the date heading.

The *Browse Events* window displays a calendar that lists all the scheduled events. Hover over each event listed to see specific information regarding that event.

You can choose to display the information by clicking on the **Daily List**, **Weekly List**, **Monthly List**, **Weekly Calendar**, or **Monthly Calendar** tabs.

Move forward or backward among days, weeks, and months by clicking on the arrows to the left of the displayed day, week, or month.

Daily, Weekly, or Monthly List

These views can be grouped by:

- **Date,**
- **Location,**
- **Group.**

Note: This column is originally configured as **Group Name**, but can be labeled as **Department/Employee**, depending on your organizations' needs and requirements.

Sortable columns on this screen are *Start Time, End Time, Title, Location, and Group Name*.

Weekly Calendar

The **Weekly Calendar** simply displays all scheduled events during a specified seven-day span, from Sunday to Saturday.

Monthly Calendar

The **Monthly Calendar** displays all scheduled events for the selected month.

The upper-right side of the *Reservations* window contains the following selections:

Filter

1. Click **Filter** to specify the searchable items for an event(s).

When you click **Filter**, a dialog box opens where you can enter the **Date, Facilities, Room, Event Type, Event Name, Group Name, and/or Group Type**.

2. Complete the fields and click **Apply**.

Today

- Click **Today** to display a list of all scheduled events for the current date by displaying the **Daily List** tab.

This Week

- Clicking **This Week** simply displays all scheduled events for the current week by displaying the **Weekly Calendar** tab.

This Month

- Clicking **This Month** displays the listed events for the currently selected month by displaying the **Monthly Calendar** tab.

Browse Facilities

The *Browse Facilities* window displays a list of rooms by building and by the setup types and capacities that are valid for the rooms. People interested in scheduling an event can use this information to determine which rooms could accommodate their gathering.

When you select **Browse Facilities**, the *Setup Types by Room* window displays. You can select that the displayed rooms be grouped by **Setup Type** or **Room**.

Group By Setup Type

Setup Type displays all rooms grouped by their respective setup types.

Selecting **Group By – Setup Type** displays *Setup types by Room* that lists all scheduled events, grouped by specific location. Sortable columns are *Location* and *Maximum Capacity*.

Hovering over each event displays that room's specific information.

Group By Room

Group By Room displays all setup types grouped by the room.

Clicking **Group By – Room** displays a *Setup types by Room* list with *Setup Type* and *Maximum Capacity* sortable columns.

Clicking on each listed item displays a separate window that contains **Building Details** and below, **Room Details**, **Setup Types**, and **Features** tabs.

Setup Types

Selecting the **Setup Types** tab displays the *Setup Types and Capacities* window with *Setup Type*, *Min Capacity*, and *Max Capacity* columns.

Features

Selecting the **Features** tab simply displays the specific features available at the chosen facility.

Browse For Space

Use the *Browse for Space* window to look for available space at a particular date and time.

To open the *Browse for Space* window:

- Click **Browse – Browse for Space**.

Note: The *Browse for Space* window is read-only; you can't make reservations from this page.

The system displays a grid showing room availability. You can use the arrows to scroll forward or backward in time.

Event Details

To see details about an event:

- Hover over an event and a Tool Tip displays.

Reservation Id	3921
Booking Id	7747
Event Name	New Employee Orientation
Event Type	Training
Date	Friday, April 04, 2008
Location	TX - Riggs Conference Room
Reserved Time	3:00 PM - 4:00 PM CT
Event Time	3:00 PM - 4:00 PM CT
Setup Type	(none) (12)
Status	Web Request
Group	Stacey Whala
Contact Name	(none)
Phone	303-555-1212
Fax	
Contact Email	stacey.whala@dea.com
Event Coordinator	(none)
Salesperson	(none)
First Booking	Friday, April 04, 2008
Last Booking	Friday, April 04, 2008
Total No. Bookings	1

2 – Tool Tip

Figure

Locate Group

Select **Locate Group** to find the events that are taking place today for a specific group.

To open the *Locate Group* window:

1. Click **Browse - Locate Group**.
2. In the **Group Name** field, enter the name of the group or a portion of a group's name.
3. Click **Locate**.

The list's columns are:

- *Time*,
- *Title*,
- *Location*,
- *View On Map*.

Virtual EMS shows the events currently scheduled, otherwise, a message indicating there are no events displays.

If a partial name is used as the search criterion and more than one group has those characters in its name, the system displays a list of the groups.

Note: You must click on the group name to complete the event search.

Reservations

Depending on what functionality has been enabled at your facility, reservations can be submitted in one of three modes - Self Serve, Service Only, and Request Form.

Requesting Space - Self Serve

Self Serve mode provides you real-time room and service availability information. Your bookings may be immediately confirmed or require approval, depending on your facility's policies.

Your facility may have multiple Room Request links, each with its own set of features and permission levels. For example, one Room Request version can be assigned to scheduling a conference room and another version assigned for booking a group workspace in a hoteling environment.

Note: Some options may or may not appear, based on your system configuration. These items are identified with **.

Requesting A Room

1. Click on **Reservations – Room Request**. The *Room Request* window displays.

Note: Fields marked with a red asterisk are required.

2. In the *When and Where* section, enter or click on the calendar icon to select a **Date** or range of dates for the event.

The screenshot displays the Virtual EMS interface for making a reservation. On the left, the 'When and Where' section contains the following fields: Date (6/4/2008 Wed), Start Time (8:00 AM), End Time (10:00 AM), Time Zone (Mountain Time), and Facilities (all). Below this is the 'Setup Information' section with Attendance and Setup Type (no preference) fields, and a 'Find Space' button. On the right, the 'Location Details' section shows 'Selected Locations' with 'No rooms currently selected' and a 'Submit Reservation' button. The page is powered by EMS.

Figure 3 – Reservations/Room Request

To the right of the calendar icon is the **Recurrence** button.

If your event occurs more than one time in the future:

3. Click **Recurrence** to display the *Appointment Recurrence* dialog box.

The *Appointment Recurrence* dialog box contains three sections – *Time*, *Recurrence Pattern*, and *Range of Recurrence*.

Figure 4 – Reservations/Room Request/Appointment Recurrence

4. In the *Time* section, manually enter the **Start Time** and **End Time** in the blank fields or select the dates using the calendar icons to the right of the fields.

The next section is *Recurrence Pattern*.

5. Select **Daily**, **Weekly**, **Monthly**, or **Random** recurrence patterns.
The dialog box changes depending on which recurrence you select.
6. In the *Range of Recurrence* section, enter or use the calendar icon to select a **Start Date**.
7. Specify the end date by clicking one of two radio buttons:
 - Choose to end the event after a specified occurrence or number of recurrences
OR
 - Enter the recurrence **End by** date or select it by clicking the calendar icon.

8. Click **Apply Recurrence** to add the information to your event and return to the *Room Request* window

OR

Click **Remove Recurrence** to cancel the recurrence information and return to the *Room Request* window.

At the *Room Request* window, in the *When* section:

9. Enter or use the calendar icon to select the **Start Time** and **End Time** for the event.

10. Select the event's **Time Zone****.

11. Choose the building, view, or area from the **Facilities** dropdown list where the event will take place.

Note: If you do not specify this field, all facilities will be searched for available rooms.

12. In the *Setup Information* section, enter your event's **Attendance**** number.

The attendance number you enter is applied as the setup count to your bookings.

13. From the dropdown list, select a **Setup Type****, if applicable.

14. Click **Find Space** to display the **Location** and **Details** tab windows.

The screenshot shows the Virtual EMS interface. On the left, the 'When and Where' section includes fields for Date (6/4/2008 Wed), Start Time (8:00 AM), End Time (10:00 AM), Time Zone (Mountain Time), and Facilities (all). The 'Setup Information' section includes Attendance (15) and Setup Type (no preference). A 'Find Space' button is visible. The main area shows 'Selected Locations' with a grid for Wednesday, June 04, 2008 MT. The grid lists rooms and their availability across different time slots (8 AM to 11 PM).

Room	C	8 A	9 A	10 A	11 A	12 P	1 P	2 P	3 P	4 P	5 P	6 P	7 P	8 P	9 P	10 P	11 P
Adelaide (CST)																	
Grenfell Centre	NA																
Westpac House	NA																
St. Peters Anglican	NA																
Adelaide Town Hall	NA																
AON Centre	NA																
Arizona (MT)																	
new room	NA																
AZ1	100																
m1	NA																
Room A	NA																
Room B	NA																
AZ2	25																
Denver (MT)																	
Den 123	10																
RoomA1	40																
Room B	40																
RoomA2	NA																
Room A	40																

Figure 5 – Room Request Results

Availability Filters

Note that Availability Filters may or may not display, depending on your system's configuration.

1. Click + **Availability Filters** to display a dialog box where you can select your event's **Room Type** and **Floor** from the respective dropdown lists.
2. From the **Features** list, click the checkboxes to search for built-in room features for your event.

Note: Features are used for searching only and won't be stored with your request.
3. Click **Find Space** to display the **Location** and **Details** tab windows.

Location Tab

When you click **Find Space** from the *Room Request* window, the **Location** tab displays the rooms in the *Availability* section.

You can click to show results as a:

1. **List**,
2. **Grid**,
3. **Floor Map****.

The *Availability* section lists available space that you can **Reserve** or **Request**, depending on your access within Virtual EMS. The *Availability* window displays *Select*, *Available*, *Location*, *Time Zone***, *Capacity*, and *Price***.

In the *List* or *Grid* view:

- Click on a room in the *Location* to view **Building Details**, **Room Details**, **Setup Types**, and **Features**, and **Floor Map**.
- Choose a location or locations by clicking on the corresponding plus sign icon under the *Select* column.

OR

- Select the **Floor Map** view and choose available space directly on the floor plan displayed.

Your choice then displays in the *Selected Location* portion of the window. *Selected Locations* columns are *Click to Remove*, *Date*, *Start Time*, *End Time*, *Location*, *Status*, and *Conflict*.

Note: *Conflict* only applies if there's a scheduling conflict with your event.

Details Tab

Use the fields in the **Details** tab to add specific information to your room request.

1. Click the **Details** tab and complete the necessary information.

Note: Required information is indicated by a red asterisk.

2. In the **Event Name** field, give your event a descriptive name, such as Staff Meeting, Workspace, etc.
3. Select an **Event Type** from the dropdown list. Your system administrator configures the event type choices.
4. Select the **Group** that holds the reservation. If enabled, you can search for your name or department by clicking the magnifying glass icon.



The *Group Lookup* dialog box displays.

Note: This column is originally configured as *Group Name*, but can be labeled as *Department/Employee*, depending on your organizations' needs and requirements.

As an example, "And" has been entered in the **Group name contains:** field.

5. Click the magnifying glass icon and any group names containing "And" display.

Note: If you wish to remove a group name, simply click the red **X** next to the appropriate group name.

6. Back on the **Details** tab, specify the name of a **Contact** person or click the magnifying glass icon to display the *Contact Lookup* dialog box, if enabled.

Note: If you select **Temporary Contact**, you will be required to enter a **Name**. Select a name displayed in the dropdown list.

7. For example, type "And" in the **Group name contains:** field and click the magnifying glass icon. These example results display.
8. Click the green plus sign next the contact name and the contact information is placed in the *Current Contact* area.
9. Click the person icon to make the current contact the default contact.

Click the red X in the upper right corner to close the *Contact Lookup* window and return to the **Details** tab:

10. Enter the **Phone** number, **Fax** number (if applicable), and **Email** address in order to complete the reservation, unless the group has been defined as not requiring contacts.
11. You can also enter a 2nd **Contact** name, **Phone**, **Fax**, and **Email** address, if enabled.
12. If required, enter the **Billing Reference** and/or P.O. Number. These fields may be labeled differently in your environment. If enabled, you may be able to look up valid values using the magnifying glass icon.

Finding a Billing Reference Number

If you need to search for Billing Reference or P.O. Number:

1. Click the magnifying glass icon to the right of the **Billing Reference** field. The *Billing Reference Lookup* dialog box displays.

2. Enter a letter in the **Starts with text:** field and click the magnifying glass icon to display the results.

You may be required to complete additional information about your meeting, including event details or other event-specific questions.

Note: Fields marked with a red asterisk are required.

If enabled, you may be able to request various services, including catering or audio-visual. For more information, please reference the *Adding or Editing Services To A Current Booking* section, beginning on page 16.

- Returning to the **Details** tab, click **Submit Reservation**.

Reservation Summary

The *Reservation Summary* window opens, displaying the **Reservation Details** tab, which contains the *Reservation Details* and *Group Details* sections that list the event's information and the **All**, **Current**, and **Historical** tabs.





The *Reservation Details* section contains information regarding your event, including **Reservation ID**, **Event Name**, **Event Type**, and **Billing Reference** and/or **P.O. Number**, if applicable.

The *Group Details* section contains information regarding your event, such as **Group**, **Contact Name**, **Phone**, **2nd Contact Name**, and **Phone**.

The **Current** tab displays events occurring today or in the future. It contains the *Actions*, *Services*, *Date*, *Time*, *Title*, *Location*, *Status*, and *Setup* columns.

Note: The *Date*, *Title*, *Location*, and *Status* columns are sortable.

Depending on your organization's business rules, a variety of icons display in the *Services* column, such as:

- A plus sign icon to add or edit services, 
- An envelope icon to display a services summary, 
- A red X to cancel a booking, 
- A clock icon to edit a booking, 

In addition, a warning icon may appear if you encounter a problem trying to reserve your room and/or service.

- To identify the issue, please check your booking status or requested services.

The **Historical** tab lists events that occurred in the past only.

Adding or Editing Services To A Current Booking

1. On the *Reservation Summary* window, click the green plus sign in the *Services* column next to the event to which you want to add a service or services.

The **Booking Details** tab displays with *Booking Details*, *Additional Details*, *Available Services*, and *Existing Services* areas.

2. Select the *Available Services* to apply to your event and a new area displays.

In this example, “Denver Catering” has been selected as the service to add to the booking.

3. Enter the **Start** and **End Time** of your service, if applicable.
4. Choose the **Service Type**, if applicable.
5. Click the plus sign icon (+) to see a list of individual items.

Note: Pause your mouse over a resource to view additional information about that resource.

6. To select an item, click the checkbox next to it and enter the desired quantity.
7. Enter any special instructions, if necessary.
8. You may be required to complete additional information regarding your service request.

Note: Fields marked with a red asterisk are required.

9. Click **Save**.

In this example, “Continental Breakfast” was the service added to the event.

- If you have multiple bookings, you can apply your service to some or all of your additional bookings.
- If you have a single booking, you’ll return to the previous screen.

Additional categories that may be available are **Setup Notes** and **Attendees**.

For **Setup Notes** categories:

1. From the *Reservation Summary*, click the plus sign icon next to the desired booking.
The **Booking Details** tab displays.
2. In the *Available Services* section, select **Setup Notes**.
The **Booking Details** tab displays with a **Setup Notes** text entry section.
3. Enter your notes and click **Save**.
The **Setup Notes** are added to the existing service.

To add attendees to the booking:

1. From the *Reservation Summary*, click the plus sign icon next to the desired booking.
The **Booking Details** tab displays.

2. In the *Available Services* section, select **Attendees** to display this window.

In the **Attendees** section, complete the necessary fields.

3. Click **Add To Additional Bookings** to add your attendee to other bookings.
4. Complete the fields and click **Save** or **Cancel** to return to the *Booking Details* window.
5. To return to the *Reservation Summary* window, click the [Back To Reservation Summary](#) link.

Editing A Service

To edit a booking's existing service:

1. On the *Booking Details* window, click the pencil icon next to the service you want to edit.
2. Make your edits in the new screen that displays and click **Save**.

Adding A New Service

To add a new service to your booking:

- From the *Reservation Summary*, click the plus sign icon in the *Services* column and select the desired service.

Please follow the procedure for “Adding or Editing Services To A Current Booking,” starting on page 15.

Adding A New Item

To add a new item from the same service:

1. Click the plus sign icon next to the desired booking in the *Existing Services* section.
2. Select the new item you want to add, enter the desired quantities, and click **Save**.

This pop-up displays.

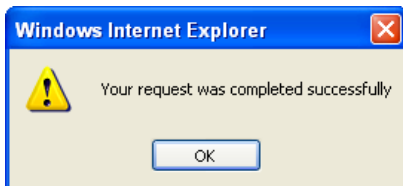


Figure 6 – New Service Item Prompt

3. Click **OK** to return to the *Booking Details* window, which displays the new items you just added.

Cancelling a Service

To cancel a service:

1. Click the red X next to the service you want to cancel.

2. Click **OK** on the displayed prompt.

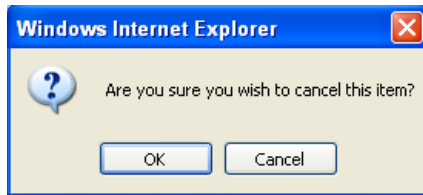


Figure 7 – Cancel Items Prompt

The *Existing Services* section reflects the service cancellation.

Cancelling A Booking

- To cancel a booking, click the red X in the *Actions* column and a popup message prompts you.

Editing A Booking

To edit an existing booking:

1. Click the clock icon in the *Actions* column.
2. Make the necessary changes in the window that displays.
3. Click **Update Booking**.

Reservation Summary Window Actions

The following actions display on the right side of the *Reservation Summary* window:

- Edit Reservation,
- Add Booking,
- Cancel Services,
- Service Availability,
- View Reservation Summary,
- Add to Personal Calendar.

Edit Reservation

Edit Reservation allows you to edit information completed on the **Details** tab when you originally made your reservation.

1. Click **Edit Reservation** from the *Reservation Summary*.
2. Make the necessary changes in the window that displays.
3. Click **Save** and the following message displays.
4. Click **OK** to return to the *Reservation Summary*.

Add Booking

This function allows you to add additional bookings to your reservation.

1. From the *Reservation Summary*, click **Add Booking**.
2. Follow the same steps as in *Requesting A Room*, starting on page 10.

Cancel Services

This function allows you to cancel a service that was requested for multiple bookings.

1. Select the event's service category that you want to cancel from the **Categories** dropdown list.
2. Select the bookings from which you want to remove the service.
3. Click **Save**.

Service Availability

Service Availability displays all the conditions that apply to your event. Depending on your facility's business processes, the ability to request services may be restricted.

- Use the *Service Availability* window to view your organization's rules for adding or editing services.

View Reservation Summary

This link allows you to view and/or email an HTML-based summary of your reservation. The summary includes room, service, and pricing information, if applicable.

- Click this link to display your booking's information, either in detail or summary format.

Add to Personal Calendar

- To add the selected event to your calendar, click **Add to Personal Calendar**.

A dialog box displays allowing you to **Open**, **Save**, or **Cancel** adding the event to your calendar.

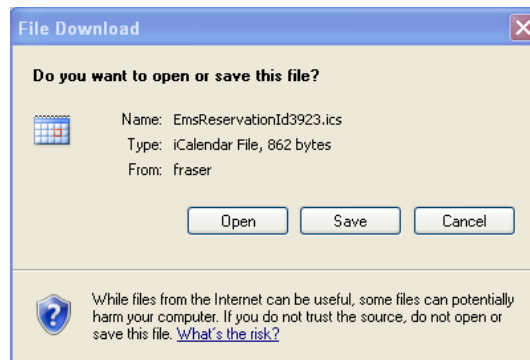


Figure 8 – Booking Details/Add To Personal Calendar Notification

- Clicking **Open** opens your calendar and saves the event to it.

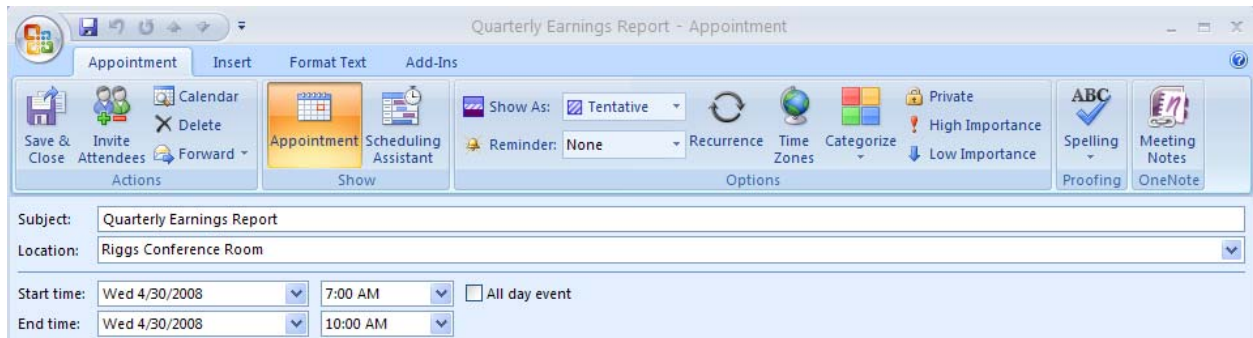


Figure 9 – Add to Personal Calendar/Open

- Clicking **Save** opens the *Save As* dialog box.

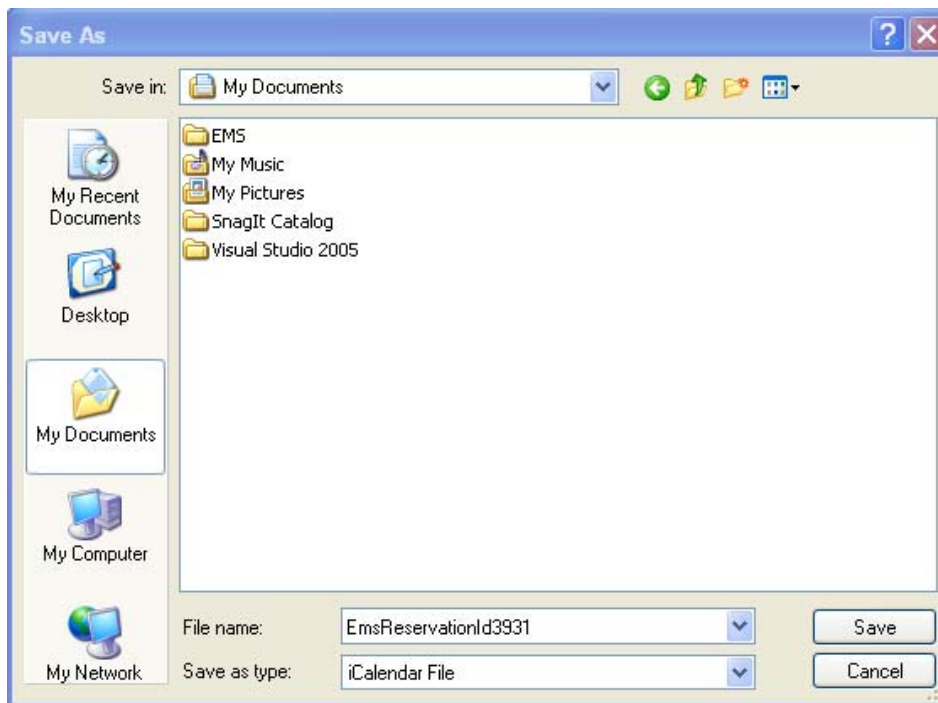


Figure 10 – Add to Personal Calendar/Save

View My Requests

To see a list of the events you have created in Virtual EMS:

- Click on **Reservations - View My Requests**.

The screenshot shows the Virtual EMS interface. At the top left is the EMS logo (Event Management Systems, Schedule Clarity). The main header is "Virtual EMS". Below the header is a navigation bar with "Browse", "Reservations", "My Account", "Links", and "Admin". On the right of the navigation bar is "Welcome Stacey Whala". Below the navigation bar is a search section with "Current" and "Historical" tabs, "Reservation Id:" and "Event Name:" input fields, and a "Quick Search" button. On the right of the search section is a "Show Cancelled" checkbox. Below the search section is a table titled "Reservations" with the following data:

Id	Name	Group	First Booking	Last Booking	Status	Location	Has Services
3907	test demo	Stacey Whala	3/31/2008 Mon	6/23/2008 Mon	Web Request	Houston Satellite Offices - Riggs Conference Room	Yes
3981	Quarterly Earnings Report	Stacey Whala	5/9/2008 Fri	5/9/2008 Fri	Web Request	Denver Administration Building - Training Room A	Yes

At the bottom of the page is a "Powered by EMS" logo.

Figure 11 – Reservations/View My Requests/Current Tab

When viewing the list, you can choose options for seeing:

- **Current** reservations (reservations with one or more bookings on or after today's date)
- OR
- **Historical** reservations (those with no bookings on or after today's date).

Current reservations can also be edited, provided the modification is made far enough in advance of the next booking date or cancelled.

If you know part or all of a **Reservation Id** or **Event Name**:

1. Enter the information in the appropriate fields.
2. Click **Quick Search**.

The screenshot shows the Virtual EMS interface. At the top left is the EMS logo (Event Management Systems, Schedule Clarity). The main header is "Virtual EMS". Below the header is a navigation bar with "Browse", "Reservations", "My Account", and "Admin". On the right of the navigation bar is "Welcome Stacey Whala". Below the navigation bar is a search section with "Current" and "Historical" tabs, "Reservation Id:" and "Event Name: sw demo" input fields, and a "Quick Search" button. On the right of the search section is a "Show Cancelled" checkbox. Below the search section is a table titled "Reservations" with the following data:

Id	Name	Group	First Booking	Last Booking	Status	Location	Has Services
3930	SW Demo - Training	Stacey Whala	4/14/2008 Mon	4/14/2008 Mon	Web Request	Houston Satellite Offices - Barton VC Room	No

Figure 12 – Reservations/View My Requests/Event Name Quick Search

- To access a reservation, click the **Event Name** located in the *Name* column.

Service Only

Service Only Requests allow you to request services for locations not managed in VEMS. For example, AV or Catering can be requested for a client meeting held in an employee's office.

To schedule a Service Only Request:

1. Click **Reservations - Service Only Request**.
2. In the *When* section, specify the **Date**, **Start/End Time**, and **Setup Information**, if required.
The **Service Availability** tab lists all the available services you can add to your event.
3. Click **Get Services**.
The **Details** tab displays.
4. Enter your **Event Name** and **Event Type**.
Please refer to the *Requesting A Room* section, starting on page 10.
5. Click **Submit Reservation**.

The process for adding services to a Service Only Request is the same as for any other booking. Like other bookings, Service Only Requests can be edited or cancelled.

Request Form

When you select **Reservations -Request Form**, a simple one-page Reservation Request Form displays. All requests must be processed and approved by an EMS Administrator.

The request can include resources and services needed for the event, as well as notes pertaining to the booking(s).

My Account

Edit My Account

Use the **Edit My Account** function to change your account information.

1. To open the *Edit My Account* window, go to **My Account - Edit My Account**.
2. The following fields can be edited - **Email**, **Name**, **Phone**, **Fax**, **Time Zone**, **Password**, **Confirm Password**, and **Notes**.

Note: To change your password, the **Password** and **Confirm Password** fields must be completed.

3. Select the **I do NOT want to receive automatic emails** checkbox to avoid receiving reminder notification and VEMS reservation summary emails. You will still receive manually-sent confirmation emails.
4. Click **Save**.

The screenshot shows the 'User Info' tab in the 'My Account' section of the Virtual EMS interface. The form contains the following fields and options:

- Email:** * (Required) Input field containing 'stacey.whala@dea.com'
- Name:** * (Required) Input field containing 'Stacey Whala'
- Phone:** Input field
- Fax:** Input field
- Time zone:** * (Required) Dropdown menu set to 'Mountain Time'
- Password:** Input field
- Confirm Password:** Input field
- Notes:** Text area with up/down arrows
- I do NOT want to receive automatic emails
- Save** button

Figure 13 – My Account/Edit My Account/User Info Tab

Figure

User Options

In order to personalize your room request process, all available process templates display.

To personalize your **Room Request** options and preferences:

1. Click **Admin – User Options** to open the Select process to personalize window.

The screenshot shows the 'Select process to personalize' window. The table below lists the available process templates:

Process
Room Request
Stacey - Self Serve

Select a template above to customize your selections

Figure 14 – Admin/User Options/Select process to personalize

2. Select a template to set the defaults for the room request process.

Browse Reservations My Account Admin

Select process to personalize

Process

Room Request

Stacey - Self Serve

Start Time: End Time: Room Type: (all) Event Name:

Time Zone: Central Time Floor: (all) Event Type:

Facilities: (all)

Setup Type: (no preference)

Save Preferences

Figure 15 – Room Request/Save Preferences

3. Enter the **Start/End Time**, select the **Time Zone**, **Facilities**, **Setup Type**, **Room Type**, **Floor**, and **Event Type** from the corresponding dropdown lists, and enter the **Event Name**.
4. Click **Save Preferences**.

Virtual EMS

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Schedule Clarity

Browse Reservations My Account Admin Welcome Stacey Whala

Select process to personalize

Process

Room Request

Stacey - Self Serve

Preferences saved. Select a template above to customize your selections

Figure 16 – Room Request Templates

Delegation

The current user identity displays in the upper right corner of the Virtual EMS window as the **Welcome** field and is associated with the concept of delegation. Delegates are people who are allowed to assume another user's Virtual EMS identity in order to make reservations on that user's behalf.

Virtual EMS

Event Management Systems
Schedule Clarity

Browse Reservations My Account Admin Welcome Stacey Whala

Figure 17 – Welcome Field

This function might be used in a situation where a manager has an administrative assistant who is responsible for the manager's scheduling. The manager would have his or her own Virtual EMS user account and would define the administrative assistant as being his or her delegate. This delegation allows the administrative assistant to log in as the manager and make reservations on his or her behalf. The advantage is that while the administrative assistant makes the reservations,

it appears to the system as though the manager is doing it. Consequently, the manager receives the emailed event confirmation and can view the request in the *View My Request* area.

To add delegates to your account:

1. From **My Account – Edit My Account**, click the **Delegates** tab.
2. Enter the delegate's name or email address (or a portion of either) in the search field and click **Search**.
3. Move the appropriate name(s) into the *Delegates* column by highlighting the desired names and clicking the right arrow button.
4. Click **Save**.



Figure 18 – My Account/Edit My Account/Delegates Tab

Admin

Create An Account

Use **Create An Account** to create a Virtual EMS account. Your account may be immediately active or require approval by an EMS administrator, depending on your organization's policies.

In Virtual EMS:

1. Before you login, go to **My Account - Create An Account**.

2. From the **User Info** tab, enter your **Email, Name, Phone, Fax, Time Zone, Password, Confirm Password,** and **Notes.**
3. If you do not want to receive group notification emails and VEMS reservation summary emails, select the **I do NOT want to receive automatic emails** checkbox.
Note: You will still receive manually-sent confirmation emails.
4. Complete additional fields, as needed.
These fields are user-defined fields, which are configured by your system administrator.
5. Click **Save.**

Glossary

Active Status

Active users can log into Virtual EMS; active users have full access to the system.

Area

Areas are groupings of buildings used for searching and reporting within Virtual EMS.

Booking Details

Booking details consist of resources, notes, services, etc. for a specific event or event.

Category

Categories are groupings of resources such as items or services that are needed for an event.

Current Reservation

A current reservation is a reservation with one or more bookings on or after the current date. Current reservations can be viewed, cancelled, and edited, provided the modification is made far enough in advance of the next booking date.

Custom Links

Custom links are character strings that users can copy into a web browser or click on as a hyperlink to be directed to the Virtual EMS calendar for a specific building.

Delegate

Delegates are people who can log into the system with their own user ID and password to assume another user's identity to perform work on that user's behalf.

Features

Features are attributes of rooms that can be used for searching in Virtual EMS.

Group Types

Group types categorize a user's list of groups that are available for searching within Virtual EMS.

Guest

A guest is someone who accesses/opens a Virtual EMS page to view a list of events, but doesn't log into the system.

Historical Reservation

Historical reservations are those reservations with no bookings on or after the current date. Historical reservations can be viewed, but not edited.

Pricing Plan

The pricing plan determines how all of the bookings and resources within a reservation are priced.

Resource

Resources are the items or services needed for an event.

Sales Category

The sales category is a method of grouping sales figures.

Salesperson

The salesperson is the group who “sold” the space for a reservation.

Self Serve Mode

Self-serve mode is only available on systems licensed for the Reservations module.

Service Only Request

Service only requests are events that take place in locations that are not actually defined to your EMS database. There is no search process associated with service only requests, but they can be edited, cancelled, etc.

Services

Services refers to the resources, services, or notes needed for a booking, such as equipment, personnel, set up notes, or any type of item defined by a user.

Setup Count

The setup count is the anticipated attendance for a booking. Setup count is applied to all of the bookings created.

Setup Type

Setup type is the physical layout of a room for a booking and is applied to all bookings created.

UDF

A User Defined Field, which stores miscellaneous information about an event that is displayed in the Reservations process in Virtual EMS.

View

Views are groupings of rooms for viewing or reporting within Virtual EMS.

Web Menus

Web menus are links that appear as menu options in Virtual EMS.

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