

## EMS AND OUTLOOK TIPS AND BEST PRACTICES

Use this quick reference guide for tips and best practices when scheduling space on campus!

## Virtual EMS: Online Reservation System

Please view the Virtual EMS Home Page to read about the scheduling process, priorities, and service provider rules and policies

- Upon submission of a reservation request, the space will appear reserved within EMS, no other space requests can be submitted to avoid conflicts
- If you use Virtual EMS to schedule spaces, then any updates should be continued to be made via Virtual EMS
- Requesters can edit and cancel reservations at any time

## Adding Attendees

If you **add attendees** to a meeting reservation request then:

- All attendees will receive an email invite and the time will be reserved on their calendars even when the space has not yet been approved
- Any updates to the reservation details will trigger automated emails to all attendees

**TIP:**

If you are reserving a large meeting, you can first request the space and then once approved, add attendees to the reservation. This will help avoid confusion and reduce emails if you have to submit a new request for space if your first request was not approved.

Space Reservation Request Form

Info

Location

Details

When and Where

☒ Add to Calendar/Send Invitations  
Date: \*  
6/9/2014 Mon

Recurrence

Start Time: \*  
3:00 PM
End Time: \*  
4:00 PM
Facilities:  
Babson Main Campus
Time zone: \*  
Eastern Time

Setup Information

Attendance: \*  
5
Setup Type: \*  
Conference Style
Find Attendee:  
hollander

Availability Filters

Find Space

Selected Locations

No rooms currently selected

Monday, June 9, 2014 Eastern Standard Time

12 Hours

Attendees	7	8	9	10	11	12 PM	1	2	3	4	5	6
All Attendees												
Sohn, Jill												

List
Grid
Floor Map

SELECT	DISPLAY NAME	EMAIL	JOB TITLE
<input checked="" type="checkbox"/>	Hollander, Megan	mhollander@babson.edu	

[illegible]



## EMS AND OUTLOOK TIPS AND BEST PRACTICES

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

Reservation Id: 1001  
Event Name: Jill  
Event Type: Networking  
Group or Requestor Name: Dean Evans & Associates  
1st Contact Name: Jill Sohn  
Phone: 7812396386

[Edit Reservation](#)  
[Manage Attendees](#)  
[Cancel All Bookings](#)  
[Add booking to personal calendar](#)

All | Current | Historical

Bookings							
ACTIONS	SERVICES	DATE	TIME	TITLE	LOCATION	STATUS	SETUP
Sunday, June 22, 2014 12:45 PM ET							
		6/22/2014 Sun	12:45 PM - 1:45 PM ET	Jill	Babson - Classroom 305	Web Request	Classroom Style (5)

[Add or Edit Services](#)

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Booking Details | [Back To Reservation Details](#)

Event Name: Jill  
Date: Sunday, June 22, 2014  
Location: Babson - Classroom 305  
Event Time: 12:45 PM - 1:45 PM ET

Group or Requestor: Dean Evans & Associates  
Setup Type: Classroom Style (5)  
Status: Web Request  
Event Type: Networking

Available Services | Existing Services

Facilities  
[Facilities Setup Notes](#)  
[Media Services](#)  
[Public Safety](#)  
[Sodexo Catering](#)

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### Adding Services

After submitting the space reservation request, a pop-up message will appear reminding you to add or notify service providers if you require services for your event/meeting

- Click on the green plus sign next to the room/space requested/reserved
- Click the hyper link for the services that you need and fill in any notes

Service providers have a cutoff time of at least 24 hours, no updates or edits can be made within their cutoff window, the links will be hidden, and you must contact the service provider directly.

### Facilities

Entering Facilities or Facilities Setup Notes will automatically generate a Work Order. As a requester you will receive status emails from the Work Order system for your facility's needs.

### Media Services

This will trigger an email to IT Support of your request and needs that you entered in the Special Instructions text box, a Media Services representative will reach out to you about your request and determine if they can meet your needs. This approval and scheduling process is outside of EMS.

### Catering

This will trigger an email to Catering that your event will have food. As a requester you must enter your food order online with Catering at least 7 business days in advance. Catering will access the reservation and add tables and linens that they will need for the food setup. Your food order will be confirmed by catering outside of EMS.

### Public Safety

This will trigger an email to Public Safety notifying them of your event and if any officer details are needed. They will use this notification to make sure that the officer detail has been requested via the Public Safety website (refer to EMS home page for link). The approval process of officer details are outside of EMS.

## EMS AND OUTLOOK TIPS AND BEST PRACTICES

**EMS for Outlook:** Creating a calendar meeting invite and adding a room with the new EMS Room Scheduling feature



### Important Notes

#### Attendance Count

When adding attendees to a meeting invite, Outlook uses the number of attendees to determine attendance and a distribution list counts as 1 person, so a requester needs to use the filter number when using a D-list.

#### Filters

Retains values from one search to another so users must remember to set filter values or clear them when necessary (Attendees, Building, Room)

#### Attachments

When attached in Outlook, they are included on the Outlook invitation but not Virtual EMS reservation record, they do not sync to Virtual EMS.

#### Recurrence Bookings

Services cannot be edited in Outlook for an entire recurrence, you must go to Virtual EMS to edit to allow individual updates on each space and date for a recurrence, Outlook would edit all dates within the recurrence

#### Updating Appointments

Any updates to the appointment details are sent to all invitees

Spaces appear booked within EMS once clicking 'Send', even without approval, EMS holds the space to avoid conflicts and duplicate requests for the same space and time (Same experience on Virtual EMS and Outlook)

**Tip #1:** Update all reservations in Virtual EMS using 'View My Requests' found in the 'Reservations' dropdown menu.

**Tip #2:** If you used Virtual EMS to schedule a meeting/event, then do not make changes via the Outlook Calendar meeting. Virtual EMS reservations should be edited in Virtual EMS

**Tip #3:** Use Outlook Room Scheduler for simple meetings only and to request initial services. In Outlook there is no ability to set the setup preference and make edits to the services, you must use Virtual EMS online.