This guide is meant to be a quick reference only. Full explanations of all steps are included in more detail on the EMS Success Website – www.success.emssoftware.com

Overview of Processes

- Navigating the EMS Web App
- Creating Single Reservations
- Creating Recurring Reservations
- Cancelling a Reservation
- Editing a Reservation
- Adding Services to an Existing Reservation

Navigating the EMS Web App

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:
     - 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.
Creating Single Reservations

To make a reservation, begin at either My Home or Create Reservation

• 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.

• Select your date and time.

• If you don’t have a room preference or don’t know which room you want, click Let Me Search For a Room.
  o Use the Setup Types filter and/or enter the Number of People to find a room that will best fit your needs.
Click **Search** to get your list of available rooms.

*NOTE – If you don’t wish to use any filters, you can click **Search** to see all rooms.

The headings will tell you if you are allowed to **Reserve** a room (doesn’t require approval) or **Request** a room (does require approval). Select a room by clicking on the blue + next to the room name.

*NOTE – Clicking the room name will give you the room details. Use the links at the top to view additional information about the room.

Enter the number of attendees and desired setup.

Click **Add Room**.

- If you do have a room preference or know which room you want, click **I Know What Room I Want**.
  - Enter the **Room Name**.
  - Click the magnifying glass to search.
The rooms that match your search criteria that are available will be listed.

Click the room you wish to reserve.

Enter the number of attendees and desired setup.

Click Add Room.

- 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.

- If you choose to add services, click on the resource you wish to add any other information required for the resource and any special instructions (if needed).

- Click OK when done adding the resource

- A summary of your services will build on the right side of the screen.
• Click **Next Step** to enter your reservation details.

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

• Enter your **Event Name** and choose an **Event Type**.

• Choose the **Group** – this is who will be hosting the event.
• Choose a **1st contact** – this is the contact for the event (if it is someone different than the Organization/Individual). The Phone, Email Address and Fax can be modified if necessary.
• Add any additional information (questions will vary depending on the template chosen).
  o Add Billing information
• If necessary, click the terms and conditions checkbox.
• Click Create Reservation.

You will get a message that your reservation has been created. However, if you are only allowed to create a request for a room, it will still need to be approved.

Creating Recurring Reservations

• From the Home page, choose your reservation template and click book now.

• When choosing your date/time, select the Recurrence button.

• Enter your recurrence details and click Apply Recurrence.
• Enter your filtering criteria and click Search.
A list of open rooms will appear with the availability listed in the second column. In the above example, 2/2 means that the room is available for 2 out of the 2 occurrences.

- Click the blue + to add the room you wish to book.
- Complete the reservation as outlined in Creating Single Reservations above.

### Cancelling a Reservation

- On the Home page, click on My Events. This will display your list of events.

- Click on the Reservation Name you wish to cancel.
• Click either **Cancel Reservation** on the right side (cancels all bookings) OR
• Click the **minus sign** next to the booking (cancels that booking only).
• You will be asked to confirm your cancellation.

**Editing a Reservation**

• From the home page, click on **My Events**. This will display your list of events.

![Reservations Table]

• Click on the **Reservation Name** you wish to edit

![Edit Reservation]

• Click Edit Reservation Details to edit **Reservation Details** (Event Name, Event Type, Organization/Individual, First Contact).
• Click the pencil icon next to the booking to edit the booking.

![Edit Booking]
Quick Reference Guide - EMS Web Application
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- You can select a new Date, Time or Location by using the search tools to the left.
- If the room is open for your new date or time, click **Update Booking** to change your information.

### Adding Services to an Existing Reservation

- To add services to an existing booking, from the Home Page, click on **My Events**.
- Select the Name of the reservation for which you wish to add services.

![Adding Services](image)

- Click the **Add Services** link.

![Select Services](image)

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

![Add Services](image)

- Select the booking(s) to which you wish to add the service. For recurring reservations, you can add the service to multiple bookings at the same time.
- Click **Add Services**.