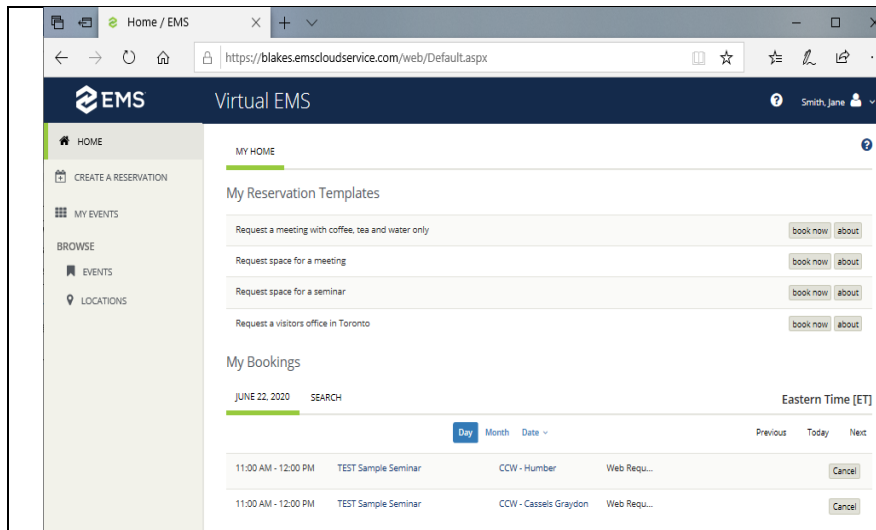# How to Use the EMS WebApp

This guide will take you through how to perform the following functions in the EMS WebApp

- Make Reservations
    - Single Date Reservation
    - Recurring (multi-Date) Reservation
- Manage Existing Reservations
    - See the Details Page for a Reservation
    - Cancel a Reservation (And All Related Bookings)
    - Cancel Some But Not All Bookings on a Reservation
    - Edit Reservation-Level Details
    - Edit Booking-Level Details
    - Add New Services (Resources) to an Existing Reservation
    - Edit Existing Services (Resources) on Existing Bookings
- Browse for Other Events
- Assign Delegates or Act as a Delegate

Make Reservations

Single Date Reservation

Begin at either **My Home** or **Create Reservation.**

- Click the **Book Now button** next to the desired Process Template

Choose Rooms

This is the first page of the Reservation Process Template

- Click the calendar and clock icons to pick a **Date** and **Times** from pop-up boxes or you can type in the white boxes

- The **Time Zone** field should have a default value

- The **Locations** area of the page should also have a default value

- Click the **Search** button

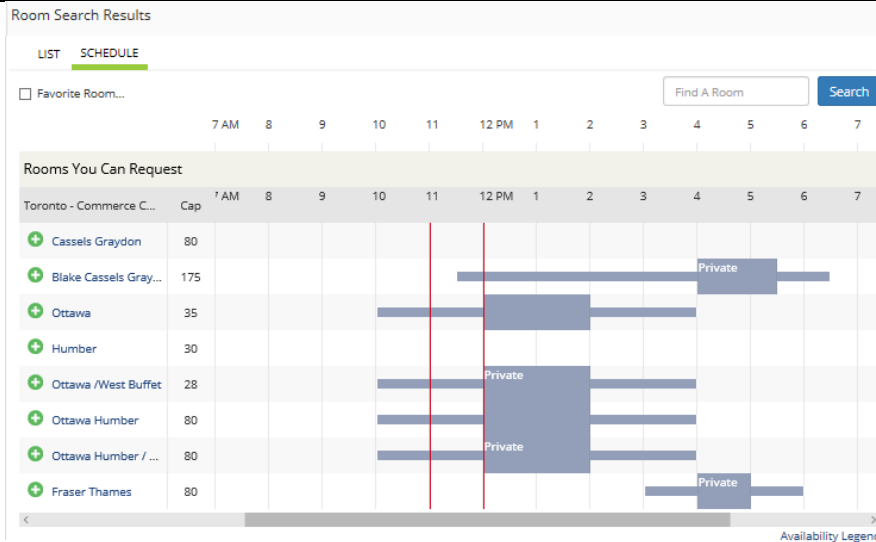|	
Let Me Search For A Room Setup Types Add/Remove (no preference) Number of People [15] **Search**	OPTIONAL - To shorten the list of Rooms that are returned… • Use the **Add/Remove** link to choose one or more Setup Types • Type in the **Number of People** who will attend your event • Click the **Search** button
Room Search Results LIST SCHEDULE ☐ Favorite Room… [Find A Room] [Search] 7 AM 8 9 10 11 12 PM 1 2 3 4 5 6 7 **Rooms You Can Request** Toronto - Commerce C… Cap Cassels Graydon 80 Blake Cassels Gray… 175 Private Ottawa 35 Humber 30 Ottawa /West Buffet 28 Private Ottawa Humber 80 Ottawa Humber / … 80 Private Fraser Thames 80 Private Availability Legend	• The right side of the page will populate with a list of rooms that meet your search criteria • The time of day goes across the top of the grid, and a list of Rooms goes down the left side of the page • Gray bars in the grid indicate other meetings scheduled for each room • The pair of red vertical bars show the time range you selected • The rooms available for your meeting times are any rows that have no gray bar between the red lines
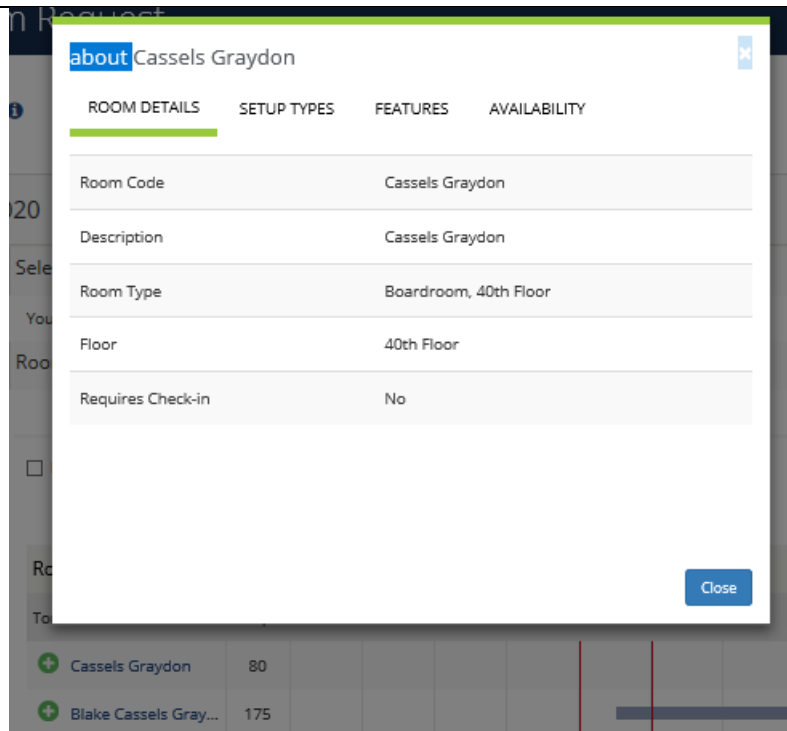
	OPTIONAL – To see more information about any of the rooms on the list... • Click the **Room name** on the list • Navigate to any or all tabs across the top of the pop-up to see all the information available about the Room
	• Click the **green + icon** next to a Room name to add that Room to your reservation • In the pop-up window enter a **Number of Attendees** and choose a **Setup Type** • Those values may have default values, but you can edit them if required • Click the **Add Room** button • Repeat these steps to add more rooms to the reservation, if needed

- All rooms added will move to the top of the page under "**Selected Rooms**"

- Click the **red – icon** next to a selected Room to remove it from the reservation if you added it by mistake

- Click the **Next Step** button after you have selected all Rooms

- Alternatively, you can click the **2 Services** link at the top of the page

- If no services are available for your reservation, skip to Reservation Details step

Choose Services

This is the second page of the Reservation Process Template

- Note that not all Process Templates will offer this option

- Click on any Resource in the list to add it to the reservation

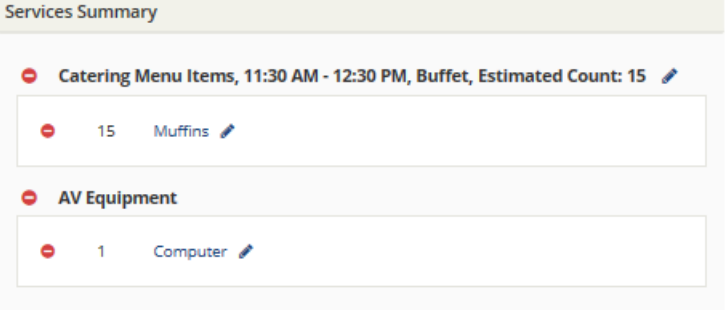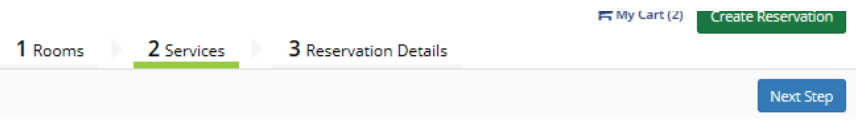|	
Catering Menu Items **Start Time [ET]** 11:30 AM **End Time [ET]** 12:30 PM **Service Type** Buffet **Estimated Count** 15	• Some Categories may require that you specify Start Time, End Time, Service Type and Estimated Count before you can add the Resource
Sweet and Salty ⌃ Cold Breakfast ⌄ Bagels Classic Continental Individual Mason Jars Muffins Pastries SPA Yogurt Build Your Own Breakfast Executive Continental Hot Breakfast ⌃	• Some sub-sections may need to be opened by clicking the arrow icon to see the Resources
Computer ✕ − 1 + (available inventory: 4) **Special Instructions** [ ] OK Cancel	• Enter a **Quantity** in the pop-up window by typing a number or using the **+ / -** icons • OPTIONAL – Type in any **Special Instructions** that may apply for the Resource you chose • Click the **OK** button

Services Summary
 	
 ● **Catering Menu Items, 11:30 AM - 12:30 PM, Buffet, Estimated Count: 15** ✏
 	
     ●   15   Muffins ✏
 	
 ● **AV Equipment**
 	
     ●   1   Computer ✏
	• On the right side of the screen a list of your selected Services will build as you make your choices
	
	 • Click the **red – icon** next to a Selected Service to remove it from the reservation if you added it by mistake

☑ I have read and agree to the terms and conditions	If any of the Services you added have required Terms and Conditions, you must agree to those before moving to the next page • Click the **"terms and conditions"** link to read the text • Click to **check the box** to agree to the Terms & Conditions
🛒 My Cart (2) Create Reservation 1 Rooms ▸ 2 Services ▸ 3 Reservation Details Next Step	• Click the **Next Step** button after you have selected all Services • Alternatively, you can click the **3 Reservation Details** link at the top of the page **IMPORTANT NOTE** – If you chose more than one Room for this reservation, any Services you select will be added to each of the Rooms on the Reservation. To avoid this, you can reserve the Rooms first, skipping the Add Services step, then go back and edit the reservation to add Services to only certain Rooms

Enter Event Details

This is the third page of the Reservation Process Template

- Type in or choose values for all required fields

- Required fields have an * after the field name

- Required fields that are not already filled in are outlined in red

- Type in an Event Name

- Choose and Event Type from the drop-down list

Requested for Details

Requested for *

Devine-Takeda, Angela

Requested by

Angela Devine-Takeda

Requested by Phone *

416-863-2251

Requested by Fax

Requested by Email Address *
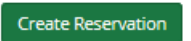
angela@gmail.com

2nd Contact

(none)

2nd Contact Phone

2nd Contact Fax

2nd Contact Email Address

- Choose a **Requested For** value from the drop-down

  o This might be your own name, or it might be the name of another person if you are booking the event on behalf of someone else

- Complete or change the **Requested By** field if the default value is not correct

  o If the Requested By value you would like to use does not appear on the list, choose the **(temporary contact)** option and type in the rest of the contact information

- Make sure you have completed at least the required contact fields, and you may complete optional fields as well

Additional Information **Do you expect you will need overflow rooms? *** Choose one ⌄ **Do you need a head table *** Choose one ⌄ **Do you need a teleconference set up for this event/meeting? *** Choose one ⌄ **Do you need Registration Tables? *** Choose one ⌄ **Does this program provide CPD credits? *** Choose one ⌄ **Will you have clients attending? *** Choose one ⌄	• Type in or choose a value for each of the questions in the **Additional Information** section of the page, as required
Billing Information **Client/Matter Number** **GL Code**	• Type in a **Client/Matter Number** and/or **GL Code** if needed
❓ Smith, Jane 👤 ⌄ 🛒 My Cart (2) Create Reservation	• Click the **Create Reservation** button at the top or bottom of the page after you have completed all the necessary fields on the page
Reservation Created What would you like to do now? ❯ Edit this reservation.	• You will see a confirmation that your Reservation has been created • You can click the **Edit this Reservation** link to see the details of the Reservation you just created

Recurring (Multi-Date) Reservation
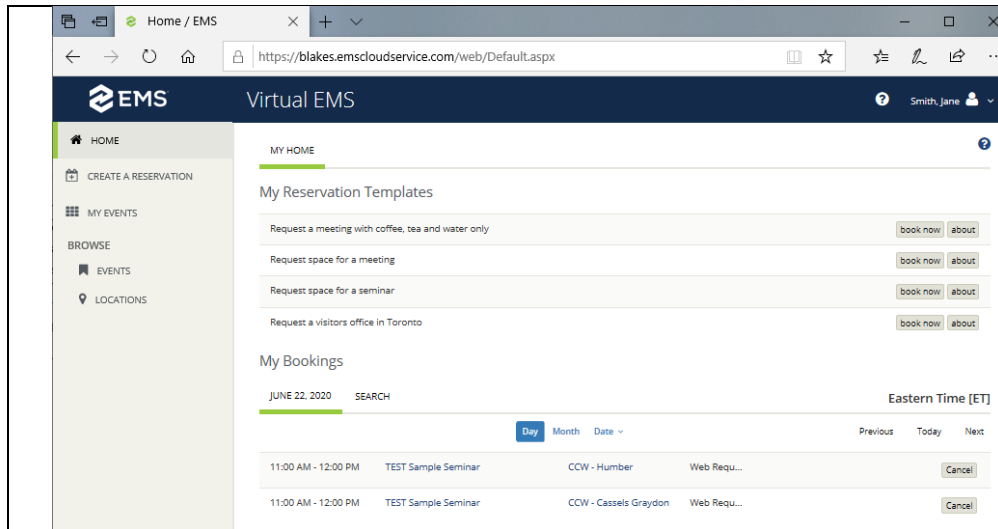
	Just like for booking a single date Reservation, begin at either **My Home** or **Create Reservation** • Click the **Book Now button** next to the desired Process Template
	• In the **Date & Time** section of the first step, click the **Recurrence** button

- In the pop-up window choose a repeat pattern, duration, and event times
  - The options in this box should be familiar to you as they are similar to options used in many popular applications such as MS Outlook

- Click the Apply Recurrence button

- Review the summary of your Recurrence to ensure it is correct

- Click the **Recurrence** button again to edit the details

- Click the Search button to display a list of available rooms

	• Instead of the Schedule View you saw earlier, instead you will just see a List of the Rooms available • In the Available column you will see numbers like 6/6 or 4/6 which tell you that the room is available for all 6 of the 6 dates in your recurrence, or only 4 of the 6 dates in your recurrence • Click the **green + icon** next to a Room name to add that Room to your reservation • If the Room you choose is not available for all of the dates in your recurrence, you will then see another list of the Rooms that are available for the remaining dates (the dates that the first Room was not available) • Click the **green + icon** next to another Room to add that Room to your reservation for the remaining dates
	Continue the rest of the Reservation just as you did above for a Single Date Reservation **IMPORTANT NOTE** – Any Services you select will be added to each booking date on the Reservation. To avoid this, you can reserve the Rooms first, skipping the Add Services step, then go back and edit the reservation to add Services only to certain bookings

Manage Existing Reservations

See the Details page for a Reservation
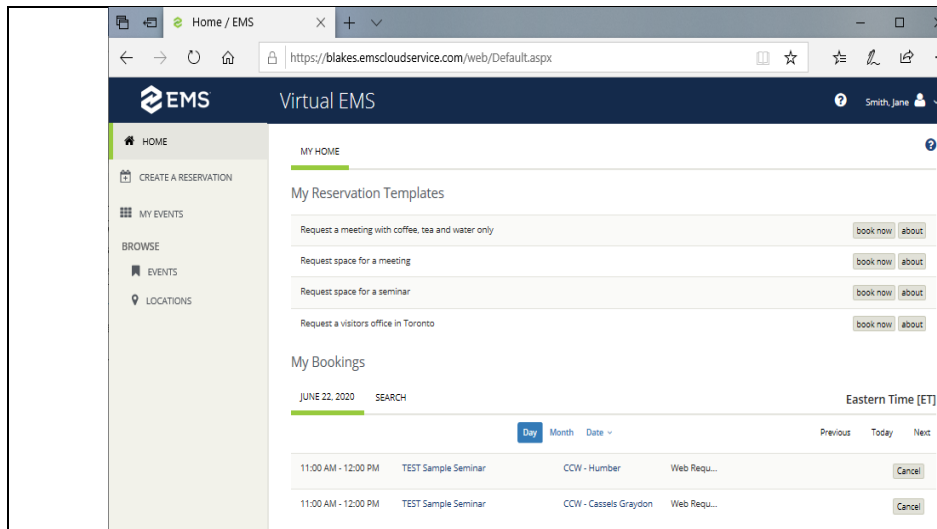
Begin at **My Home** or any other page that displays the left side navigation bar

- Click the **My Events** link on the left side navigation bar
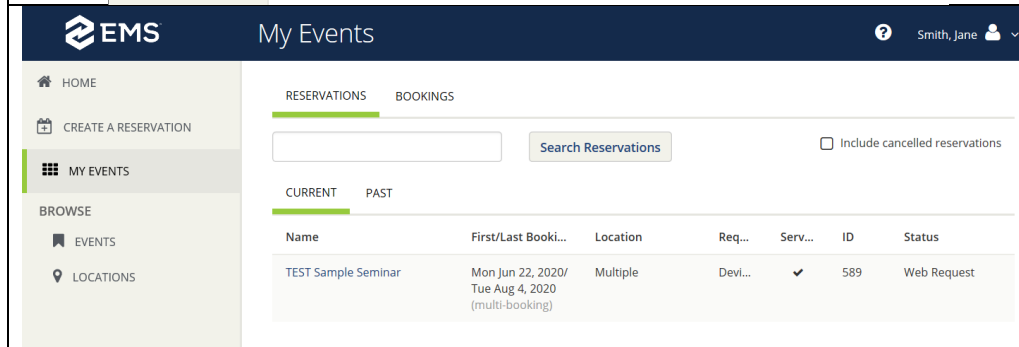
The My Events page defaults to view upcoming ("current") Reservations

You can click links on the page to see Bookings instead of Reservations, or to see Reservations that are in the past

- Click the **Reservation Name** of the reservation you wish to cancel

This page displays the details of a single reservation, with the Reservation-level information at the top of the page and the Booking-level information at the bottom of the page

Cancel a Reservation (And All Related Bookings)
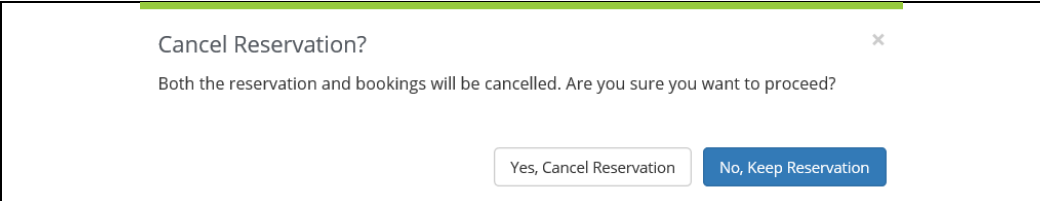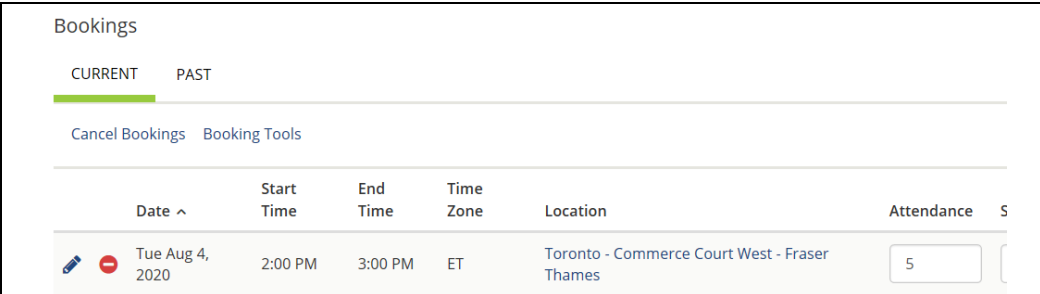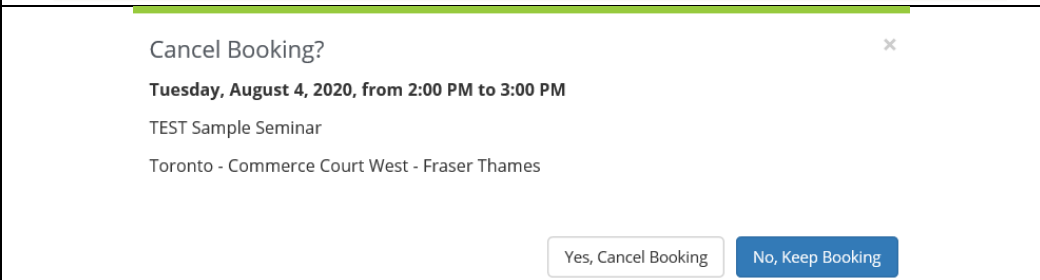
- Click the **X Cancel Reservation** link in the upper right portion of the page

Cancel Reservation? ✕ Both the reservation and bookings will be cancelled. Are you sure you want to proceed? [Yes, Cancel Reservation] [No, Keep Reservation]	• Read the confirmation pop-up window and click the **Yes, Cancel Reservation** button to cancel all the bookings and the reservation

Cancel Some But Not All Bookings on a Reservation

Bookings CURRENT PAST Cancel Bookings Booking Tools 		Start Time	End Time	Time Zone	Location	Attendance	S
Date ⌃						
✏ ⊖ Tue Aug 4, 2020	2:00 PM	3:00 PM	ET	Toronto - Commerce Court West - Fraser Thames	5			• Click the ⊖ icon next to a booking in the bottom portion of the page
Cancel Booking? ✕ **Tuesday, August 4, 2020, from 2:00 PM to 3:00 PM** TEST Sample Seminar Toronto - Commerce Court West - Fraser Thames [Yes, Cancel Booking] [No, Keep Booking]	• Read the confirmation pop-up window and click the **Yes, Cancel Booking** button to cancel just the one booking but not the entire reservation • Repeat to cancel additional Bookings as needed

Edit Reservation-Level Details

❮ My Events / TEST Sample Seminar beginning RESERVATION DETAILS ADDITIONAL INFORMATION ✏ Edit Reservation Details Event Name TEST Samp Event Type Seminar - I Requested for Devine-Tak	• Click the **Edit Reservation Details** link

Edit Reservation
❮ TEST Sample Seminar (589)   Save Reservation Details ❓
 	
Event Details
 	
Event Name *   Event Type *
TEST Sample Seminar   Seminar - Internal Atten ⌄
 	
Requested for Details
 	
Requested for *
Devine-Takeda, Angela   ⌄
 	
Requested by
Angela Devine-Takeda   ⌄
 	
Requested by Phone *
	• Make changes to the desired fields
	    ◦ **Event Name**
	    ◦ **Event Type**
	    ◦ **Requested For**
	    ◦ **Requested By** and contact information
	    ◦ Any of the Additional Information Fields
	    ◦ Any of the Billing Information fields
	• Click the **Save Reservation Details** button at the top or bottom of the page to save your changes

Edit Booking-Level Details

Bookings CURRENT PAST Cancel Bookings Booking Tools | Date ∧	Start Time	End Time	Time Zone	Location	Attendance	S | ✏ ⊖ Tue Aug 4, 2020 2:00 PM 3:00 PM ET Toronto - Commerce Court West - Fraser Thames 5	• Click the ✏ icon next to a booking in the bottom portion of the page

Edit Booking Tue Aug 4, 2020
 	
[Update Booking]
 	
Event Details
 	
Event Name *
TEST Sample Seminar
 	
Event Type *
Seminar - Internal Attendees
 	
Date & Time
 	
Date
Tue 08/04/2020
 	
Start Time   End Time
2:00 PM   3:00 PM
 	
Create booking in this time zone
Eastern Time
 	
Locations   Add/Remove
Toronto - Commerce Court West
 	
[Search]
 	
Room Search Results ✏ Attendance & Setup Type
 	
LIST   SCHEDULE
 	
☐ Favorite Rooms only.   Find A Room   [Search]
 	
7 AM 8 9 10 11 12 PM 1
 	
Rooms You Can Request
 	
Toronto - Commerce C... Cap   7 AM 8 9 10 11 12 PM 1
 	
Humber   6
 	
Availability Legend
 	
[Update Booking] Cancel
	• Make changes to the desired fields on the left side of the page
	  ○ **Event Name**
	  ○ **Event Type**
	  ○ **Booking Date**
	  ○ **Booking Times**
	• To change the Number of Attendees or the Setup Type…
	  ○ Click the **Attendance & Setup** link at the top of the page
	  ○ Make changes to the desired fields in the pop-up
	  ○ Click the **Update** button
	• To change the room…
	  ○ Click the **Search** button on the left to see a list of Rooms
	  ○ Click the ⊕ icon next to the new room
	  ○ When requested, enter the **Number of Attendees** and the **Setup Type**

	o Click the **Add Room** button
	• Click the **Update Booking** button at the top or bottom of the page to save your changes

Add New Services (Resources) to an Existing Reservation

Reservation Tasks Add Services Booking Tools ✖ Cancel Reservation Send Invitation	• Click the **Add Services** link in the upper right portion of the page
My Events ❮ TEST Sample Seminar (589) Select Services Next Step Catering Menu Items Time Zone Eastern Time Start Time End Time Service Type Estimated Count 2:00 PM 🕐 3:00 PM 🕐 Buffet ⌄ 1 ☑ I have read and agree to the terms and conditions Additional Notes ⌃ Beverages ⌄ Beer Beverage Cart Champagne	• If the Category Requires it, enter **Start Time**, **End Time**, **Service Type** and **Estimated Count** • If the Category requires it, Click the **Terms and Conditions** link to read the Terms and Conditions, and check the box indicating you have read them • Open Groupings as necessary to see the lists of available resources • Click the Resource you wish to add • In the pop-up enter a quantity and any Special Instructions if necessary, then click the **OK** button • Repeat to add any additional Resources • Click the **Next Step** button at the top of the page

My Events ‹ Select Services / TEST Sample Seminar (589) Add Services [Add Services] ☑ Date ⌃ Booking Time Service Time Time Zone Location Event Name Event Type Result ☑ Tue Aug 4, 2020 2:00 PM - 3:00 PM 2:00 PM - 3:00 PM Eastern Time CCW - Humber TEST Sample Seminar Seminar - Internal Attendees	• Check the box next to any of the Bookings to which your selected list of Resources should be added • Click the **Add Services** button

Edit Existing Services (Resources) on Existing Bookings

Bookings CURRENT PAST Cancel Bookings Booking Tools Date ⌃ Start Time End Time Time Zone Location ✏ ⊖ Tue Aug 4, 2020 2:00 PM 3:00 PM ET Toronto - Commerce Co West - Humber View Services | Manage Services	• Click the **Manage Services** link below one of the bookings in the lower portion of the page
Services Summary ⊖ **Catering Menu Items, 2:00 PM - 3:00 PM, Buffet, Estimated Count: 1** ✏ ⊖ 1 Dietary Restriction/Allergy Alert ✏ $ 0.00 ⊖ 1 Soft Drinks ✏ $ 0.00	• Scroll to the bottom of the page to see the Summary of existing Services • Click the ✏ icon next to a Resource to change the Quantity or Special Instructions
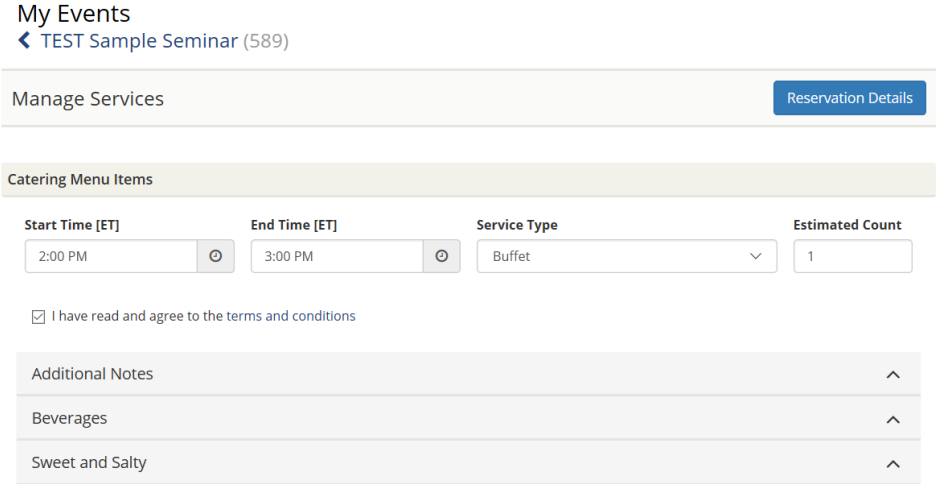
	• Click the 🚫 icon next to a Resource to remove it from the Booking
My Events ‹ TEST Sample Seminar (589) Manage Services [Reservation Details] **Catering Menu Items** **Start Time [ET]** **End Time [ET]** **Service Type** **Estimated Count** 2:00 PM 3:00 PM Buffet 1 ☑ I have read and agree to the terms and conditions Additional Notes ⌃ Beverages ⌃ Sweet and Salty ⌃	• At the top of the page you can also add additional Resources to this specific Booking by selecting the resource, and filling in any required fields, much as you did in the Add Services instructions above • When you have finished making all changes, additions, and deletions, click the **Reservation Details** button at the top of the page to save all changes

Browse for Other Events

⌂ HOME 📅 CREATE A RESERVATION ▦ MY EVENTS **BROWSE** 🔖 EVENTS 📍 LOCATIONS	• Click the **Browse Events** link on the left Navigation Bar

- Click a gray bar in the calendar to see the details of that Event

- Click a date box on the Calendar to see a list of all the Events for that day

- Click the **Add Filter** button at the top of the page to see options to filter the items in the calendar based on Location, Requested For, Event Type or Event Name

- Click the **Browse Locations** link on the left Navigation Bar

Browse Locations ❓ Smith, Jane 👤 ▼ Filters Compact View Saved Filters Date [Tue 08/04/2020 📅] Time Zone [Eastern Time ▼] Locations (all) **Add/Remove Locations** [Add Filter] Save Filters Locations [◁ Mon] Tue August 4, 2020 [Wed ▷] [Today] [Find A Room] [Search] 7 AM 8 9 10 11 12 PM 1 2 3 4 5 6 7 Toronto - Commerce C... Cap 32 A 4 34 A 4 34 B 4 35 4 36 4 37 4 38 4	Rooms are the labels on the rows that go down the left side of the page Times of day are the column headers that go across the top of the page • Click a gray bar in the calendar to see the details of that Event • Click a **Room Name/Number** to see all the details about that room (like Setup Types, Features and any Images that may have been uploaded) • Click the **Add Filter** button at the top of the page to see options to filter the Rooms in the list based on things like C**apacity, Features, Room Types** or **Setup Types** • Click the **<** and **>** buttons on either side of the date to scroll to the following day or previous day, or click the **Date** field in the **Filters** section at the top of the page to select a specific date to jump to

Assign Delegates or Act as a Delegate

❓ Smith, Jane 👤 ▼ My Account ⤷ Sign Out	• Click your Name in the top right corner of any page • Choose the My Account option from the drop-down list

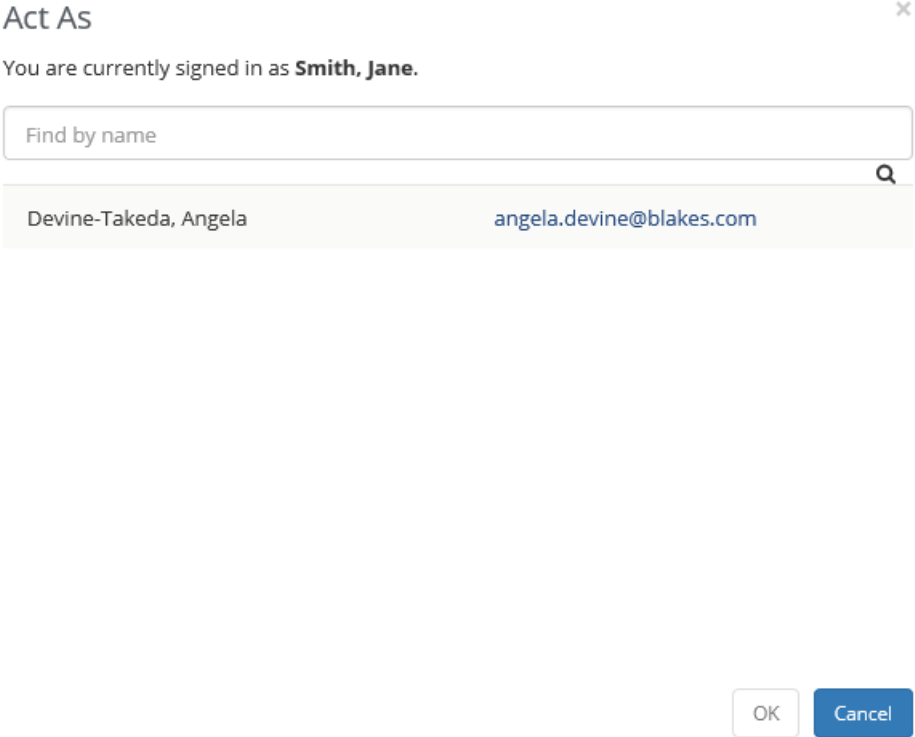|	
My Account DELEGATES PERSONALIZATION MY FAVORITE ROOMS Add New Delegate `carol` 🔍 Robertshaw, **Carol** <carol.robertshaw@blakes.com> Your Saved Delegates **Name** ^ **Email** **Phone** ⊗ Devine-Takeda, Angela angela.devine@blakes.com 416-863-	• Make sure the **Delegates** tab is underlined in green at the top of the page • In the Add New Delegate field start typing the first few characters of the name of another user you wish to be able to manage your existing reservations or make new reservations as if they were you • When you see the person's full name appear in the drop down, click it to add the new person as your delegate • At the bottom of the page see your current list of delegates (Angela is currently Jane's Delegate in this screen shot) • Click the ⊗ icon next to an existing Delegate to remove the rights of that person to act as your Delegate •
❓ Smith, Jane 👤 ⌄ My Account Act As 🚪 Sign Out	To act as a Delegate for someone else… • Click your **Name** in the top right corner of any page • Choose the **Act As** option from the drop-down list (this only works if another user has set you up as their Delegate)

Act As ✕ You are currently signed in as **Smith, Jane**. Find by name 🔍 Devine-Takeda, Angela angela.devine@blakes.com OK Cancel	• Highlight the Name on the list of the person for whom you wish to act as Delegate • Click the **OK** button
❓ Acting As Devine-Takeda, Angela 👤 ⌄ ❓	• While you are acting as a Delegate for another user, the top right corner of your screen will remind you of that • You will only see and edit the other user's Reservations on the My Events page • Any new Reservations you create while acting as another user will be attached to that other user, and you will only be able to see them when you are logged in Acting as that other user

	- To see and edit your own events, use the **Act As** option at the top right of the page to return your view to yourself