Local Schedulers EMS Web Client Cheat Sheet

**Scheduling**

1. If you’d like to check if the date/time/room are available before you schedule your meeting, use the Book.
2. Click Wizard.
3. Select the date(s) for this meeting. If it’s a re-occurring meeting, click on Date Pattern; otherwise, you can just select all dates manually. Remember that all users of this system cannot schedule more than one calendar year in advance.
4. Enter the Start & End times.
5. For Search Method, be sure it is set to Best Fit.
6. Make sure the Status is set to Confirmed.
7. Press Next.
8. In the Available column, click on the Room you’d like to schedule and press the top arrow so that it brings that room over to the Selected column.
10. Type the Event Name. Please write a short, but descriptive Event Name so that users from the community will be able to understand the nature of the event/meeting. Avoid acronyms unless they are widely known campus-wide.
11. Select the appropriate Event Type. In most cases, local schedulers should pick Department Meeting.
12. Select the appropriate Source for how you received the request to schedule this meeting.
13. Next to Group, click on the magnifying glass and type the Group Name. Remember that you should only be scheduling meetings for your department only. If you’ve selected a different Group Name than yours, this should be an indicator to you that the requestor should put this request in at ems.usfca.edu/virtualems, which would send the request to EM&GS.
14. Select Contact Person. For reporting purposes, this should be whom the reservation is for. The system knows who you are based off of your login, so if you are scheduling this on behalf of someone else, select that person as the Contact Person.
15. For Setup Type, choose (default). In most cases, the rooms that you have access to schedule are set in Conference Style.
16. For Setup Count, type in the number of attendees for this meeting.
17. Under the User Defined Fields Tab, click on Publish to Calendar. It’s set to default to “No, do not publish to any calendar;” but you have the option to change that. Remember that we really only want to publish things to the USF calendar that we want to drive attendees to a large event, so all small, departmental meetings shouldn’t be published.

**Cancelling A Booking (Just one Date on a Reservation)**

1. Find your reservation using the Book and double click on it.
2. If you’d like to only cancel one of many bookings under a reservation, make sure the booking is selected on the left-hand side of the window and press Edit on the top.
3. Change the Status to Cancelled.
4. Enter the Reason why this meeting was cancelled.
5. For Who Cancelled, write the name of who told you to cancel it.
6. Press OK.

**Cancelling A Reservation (All Dates on a Reservation)**

1. Find your reservation using the Book and double click on it.
2. If your reservation has multiple bookings under it, and you’d like to cancel all bookings under the reservation, make sure the reservation is selected on the left-hand side of the window, and press Change Status.
3. Change the Status to Cancelled.
4. Enter the Reason why this meeting was cancelled.
5. For Who Cancelled, write the name of who told you to cancel it.
6. Press Next.
7. Select the date(s) of the bookings you’d like to cancel.

**Helpful Hints**

1. The recommended browsers are Firefox and Internet Explorer.
2. Most browsers are blocking pop-ups from EMS. Here’s a video to show you how to allow pop-ups from EMS in Internet Explorer (http://screencast.com/t/Tv8c4nTDi) and Firefox (http://screencast.com/t/b36xqUYLdU).
3. There are two interfaces to EMS.
   a. EMS Web Client (http://ems.usfca.edu/emswebclient/) is where you schedule meetings in the room(s) you have access to. Your login is usfusername and your password was setup at training. If you want to change this password, you can do so when logged in. If you forgot your password, please contact EM&GS to re-set your password.
   b. Event and Room Request (http://ems.usfca.edu/virtualems/) is where you request for events, meetings, or services. Your login is usfusername and your password is usfconnectpassword.