What’s New in EMS

EMS Workplace 7.0
EMS Campus 4.0
EMS Enterprise 7.0
EMS Legal 7.0
EMS District 7.0

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What’s New in EMS

IMPORTANT: Before downloading and installing this upgrade, we strongly encourage you to contact your Account Executive or Consultant to discuss changes in the application and the upgrade process itself. Please use the following key to determine which EMS product(s) a particular enhancement applies to:

- **ALL** = All EMS Products
- **C** = Campus Only
- **W** = Workplace Only

**Enhancements to the Customers Browser**
- **ALL** – The Customer Browser has been re-developed to provide more CRM-like capabilities in managing your customers and contacts.
- **ALL** – Customer and contact filtering has been significantly improved. Users can search by client/contact email address, city, state, phone, salesperson, etc.
- **ALL** - When manually creating a new contact, the phone and fax numbers are now defaulted with the client’s phone and fax number.

**Enhancements to Video Conferencing**
- **ALL** – The videoconference reservation process within the EMS desktop client has been enhanced to mirror (with some exceptions) Virtual EMS’ videoconference reservations process. A videoconference Reservation Wizard Template can now be defined that allows you to default various settings such as Event Name, feature(s), room type and setup type. Videoconference specific User Defined Fields can also be assigned to a specific Reservation Wizard Template.
- **ALL** – A Videoconference tab has been added to the last screen of the Reservation Wizard. This tab allows an EMS user to identify the host endpoint.
- **ALL** – Event Type is no longer used to indicate the host endpoint. A new booking-level Host checkbox has been added.
- **ALL** – Changes to a booking belonging to a videoconference occurrence (i.e. a set of related videoconference bookings occurring at a specific date/time) cascade to other related bookings within that occurrence.

**Enhancements to the Dashboard**
- **ALL** – Additional filtering options have been added to the Web Reservations section in the Dashboard. An “(all)” option is available to quickly select all buildings and statuses. In addition, a View dropdown has been added to filter bookings by various date options.
- **ALL** – A Date Added column has been added to the Web Reservations section.
- **ALL** – The Reconfirm Dates section now automatically sorts by Reconfirm Date.
- **ALL** – An Event Type column has been added to the Web Requests section.
- **ALL** – A tool has been created that allows you to reassign multiple reminders from one EMS user to another.
- **ALL** – Thru Next Week is now an available View option in the Reminders section.

**Enhancements to the Web Users Browser**
- **ALL** - An option is now available to create a new customer or contact from a web user.
- **ALL** - An option to email selected web users is now available.
- **ALL** - A delegates report (with two formats) has been added.
- **ALL** - Customer and City columns are now available in the Web Users Browser (requires that the - Web Users linked to Groups via External Reference – be enabled).

**Enhancements to Browser/Query Builder/Calendar**
- **ALL** – Is Empty and Is Not Empty are now available advanced filter options.
- **ALL** - An option has been added to the Calendar that allows a user to specify the color for the booking count.
- **ALL** – Queries can now be inactivated.
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- **ALL** – Query Builder fields that exist at both the reservation and booking levels (e.g. Event Type, Event Name, etc.) are prefixed with “Reservation” and “Booking”.
- **ALL** – Default Contact, Reminders, Comments and Attachments have been added as fields to the Group type query.
- **ALL** – Resource Grouping has been added as an available field.
- **C** – A Location field has been added to the Academic type Query Builder.

### Enhancements to Reports
- **ALL** – The Report Comment field can now accommodate 255 characters.
- **ALL** – A Show Inactive Resources option has been added to the Resource Statistics report.
- **ALL** – Two new By Date – Reserved Time options are now available for Room Cards.
- **ALL** – The category list on the Categories tab is filtered by the buildings selected on the Buildings tab.
- **ALL** – An option to display Selection item notes is now available in the BEO.
- **ALL** – A new two column BEO format is available.
- **ALL** – An option has been added to the BEO to set/reset page numbers by booking.
- **ALL** – Salesperson is now displayed on the BEO.
- **ALL** – An option to enable/disable page breaks has been added to the BEO.
- **ALL** – Show Notes, Show Special Instructions and Show Selections are available options on the Production report.
- **ALL** – The Production Report can now be run for a single Production Area.
- **ALL** – Reservation ID and Booking ID have been added to the detail formats of the Production report.
- **ALL** – An option to suppress end time on Room Cards is available.
- **ALL** – A new Service Order Change Report has been added.
- **W** – Number of Check-Ins is now displayed on the Check In Statistics report.

### Enhancements to the Visitors Browser
- **ALL** – Attendees can now be searched across a date range.
- **ALL** – Multiple visitors can be checked-in/out at one time.
- **ALL** – An Undo Check In tool is now available.
- **ALL** – A Date column has been added.
- **ALL** – A Visitors Report is available.

### Enhancements to the Reservation Wizard
- **ALL** – A Sort Rooms by Book Sequence option is now available.
- **ALL** – Building and Room Code/Description information has been added to the right listbox (Selected Rooms listbox) on screen two of the Reservation Wizard.
- **ALL** – The Event URL is now available when making a new reservation.
- **ALL** – Building hour conflict display has been improved.

### Enhancements to the Book
- **ALL** - A Booked Space Status Only setting has been added to the Book. This option is tied to the existing Highlight Rooms Without Bookings setting.
- **ALL** - When moving a booking in the Book, a shadow bar now displays highlighting the reserved/event start/end times.
- **ALL** – For large implementations, a new Always Prompt For Room on Startup option is available to pre-filter the list of rooms before displaying them in the Book.
- **ALL** – Setup/setup count validation now occurs when using the Swap Rooms With Another Booking option.
- **ALL** – 2nd Contact information can be displayed in the tool tip.
- **C** - Academic tooltip labels are now displayed in the Book.
- **C** - Entire courses (i.e. course plus all course dates) can now be swapped in the Book.

### Enhancements to the Navigator
- **ALL** - An option is now available in the Navigator to auto adjust reserved times when editing event times.
- **ALL** – Multiple resources can be selected and added at once within the resource selector.
• ALL – A new control has been added to the lower half of the Navigator that provides various new grouping/filtering options.
• ALL – Right-clicking the upper half of the Navigator displays options to email the customer and/or contact.
• ALL – The process of entering booking deposits has improved.
• ALL – A History tab is available for categories defined as Resources without Service Orders.
• ALL – Alerts can now be set at the booking and service order levels.
• ALL – A View Alerts option has been added to the Navigator that allows you to easily view alerts.
• C – When opening a published course from the Navigator, the standard Navigator now opens (instead of the Course Navigator).

Enhancements to Confirmations/Invoices
• ALL – HTML formatted messages can now be included with confirmations and invoices.
• ALL – A Print Room Type option has been added.
• ALL – When emailing a confirmation, the confirmation name is now used for the confirmation attachment name.
• ALL – An option has been added to always show the time zone.
• ALL – When emailing a confirmation, an option is now available that allows you to select from a list of reservation level attachments to include in the email.
• ALL – A Suppress Item Selections option has been added.
• ALL – An option is now available to subtotal charges by category.
• ALL – A Print Room Notes option has been added.
• ALL – An option to display Selection item notes is now available in the confirmation.

Enhancements to Email
• ALL – A new preference is available that allows a user using Microsoft Outlook to include their Outlook signature when sending emails from EMS.
• ALL – Users using EMS’ SMTP email functionality can create and include a signature when sending emails from EMS.
• ALL – A new preference (Send Emails Using Department Email Address) has been added.
• ALL – An option is now available (requires separately purchased CRM module) to save all attachments (Invoices, Confirmations, etc.) when emailing a customer. WARNING: Enabling this option will significantly increase the size of your database!

Enhancements to Billing
• ALL – Customer Email Address can now be displayed in the invoice header.
• ALL – When emailing an invoice, header and footer messages can be included in the email body.
• ALL – Multiple invoices can now be reprinted at once in the Navigator.
• ALL – Billing reports can be accessed under Billing > Reports and Reports > Billing.
• ALL – An option to display resource selections on invoices is now available.

Enhancements to Notifications
• ALL – User Defined Field based notifications are now available.
• ALL – An HTML Email format option has been added for email notifications.
• ALL – Email notifications for Notes category changes now include the full note text.
• ALL – Notifications can be inactivated.
• ALL – Email notifications for booking level notifications now display the actual booking date in the Subject Line of the email (not just the first booking date of the reservation.)

Enhancements to User Defined Fields (UDFs)
• ALL – The ability to add booking-level UDFs is available.
• ALL – List type UDFs can now be sequenced in EMS/Virtual EMS.

Enhancements to Services/Resources/Resource Configuration
• **ALL** – Resource packages can now be defined to facilitate the process of adding and managing multiple related resources to/for a booking. For example, a “Standard Meeting” package that includes a flip chart, projector and laptop can be created. When selected in EMS or Virtual EMS, all resources included in the package are automatically added to the service order. When the quantity on the resource package is updated/deleted, related resources are also updated/deleted.

• **ALL** – Resources and service types in EMS now sort by the Sequence field defined on those items in EMS/Virtual EMS.

• **ALL** – An option to export pricing information for resources has been added.

• **ALL** – Resources can now be marked as Internal. Internal resources can be excluded from confirmations and invoices.

• **ALL** – A new Resource Configuration Wizard is available that allows you to set various settings (e.g. Grouping, Account, etc.) for multiple resources.

**Enhancements to Rooms/Room Configuration**

• **ALL** - The following new options are available in the Room Configuration Wizard: Account, Default Setup Type, Active and User Defined Fields.

• **ALL** – PDF file types can now be used for images. These PDFs can be viewed in EMS and Virtual EMS.

• **ALL** – An option to export pricing information for rooms has been added.

• **ALL** – Alerts can now be configured for a specific room that displays when booking that room. Room specific Confirmation Notes can also be added.

• **ALL** – The Building dropdown on the Rooms configuration screen now allows you to filter by Views or Areas.

**Misc. EMS Enhancements**

• **ALL** – An Export Errors option is available that exports errors with the AIU import file in an XML format.

• **ALL** – EMS can now easily integrate with Microsoft Word documents to produce contracts, permits, etc. containing reservation information (requires separately purchased CRM module).

• **ALL** – Attachment Types can now be defined.

• **ALL** – The Manage Services area can now be printed.

• **ALL** – Pricing for room and/or resources charges can now be designated in a specific currency by building or category for display in EMS/Virtual EMS.

• **ALL** – The Visitor checkbox can now be automatically selected when adding a new attendee.

• **C** – Areas and Views are now available in all Building dropdowns.

**Enhancements to System Administration**

• **ALL** - The maximum lengths for various fields in EMS have been increased.
  - Account – increased to 50 characters
  - Billing Reference – increased to 100 characters
  - PO Number – increased to 100 characters
  - Feature – increased to 50 characters
  - Client Type – increased to 50 characters
  - Building Code – increased to 20 characters
  - Room Code – increased to 20 characters

• **ALL** – A new parameter is available that disables the Account field on customer records.

• **ALL** – A Booking Move/Change Status Wizard has been developed. This tool allows you to change the booking date and/or status for a large number of reservations.

• **ALL** - An option has been added to the Room Administration Wizard to remove specific rooms from the configuration areas (e.g. Views, Notification Rules, etc.) available in the wizard.

• **ALL** – The Override Existing Bookings Utility can now be run against multiple rooms. In addition, an Event Type can now be specified.

• **ALL** – A new Warning For Invalid (Blanks Are Valid) option has been added to the Validate Billing Reference and Validate PO Number parameters.

• **ALL** – A Delete Attachments security process is now available.

• **C** – Rooms can now be added/removed to/from domains and academic units in the Room Administration Wizard.
• C – A new Preassign Scenarios security process has been added to user security.

Miscellaneous EMS Campus Enhancements
• C – Time Block Templates can now be defined. These templates can be used:
  o To limit the meeting patterns used during Define and Edit Mode
  o To add weight to courses that comply with the template during Optimization
  o In academic reporting

• C – A Search for Rooms tool has been developed that significantly simplifies the process of finding an available classroom.
• C – When adding a new course/section, course dates with different meeting patterns can be specified.
• C – Some settings on the Set Preferences, Course Navigator and Course Dates forms have been gently reorganized to improve usability.
• C – A new Accumulate Enrollment on Share Space Courses parameter has been added.

Enhancements to Publishing/Post-Publishing
• C – A default Web User and Web Process Template can now be set by academic unit. Once a term has been published, the assigned web user can access the course in Virtual EMS.
• C – A new Swap feature has been added to the post publish Course Updates screen. This tool can be used for courses that have had their rooms exchanged in the SIS.
• C – Courses displayed when using the Share feature in the post publish Course Updates screen can now be filtered by Subject, Instructor, CRN and Course Title.
• C – Service orders added to courses are no longer deleted when non-date changes are made.
• C – An Instructor column has been added to the post-publish Course Updates screen.

Enhancements to the Academic Book
• C – Room capacity is now displayed next to room description.
• C – Room information (e.g. bookings and room details) is now displayed when right-clicking a room.

Enhancements to Optimization
• C – Weightings can now be assigned to the following preferences: Instructor Back to Back, Time Block Conformance and Same Room (i.e. how important is it that all course dates for a course are assigned to the same room).
• C – Multiple records can be selected at once on the Resolve Room Assignments and Pre-assign Rooms screens.
• C – Optimization scenario results can be printed on the Resolve Room Assignments screen. A Sort column has also been added to the report.
• C – Room pre-assignments can now be copied from previous terms.
• C – Courses can be now optimized based on actual or estimated enrollment.

Enhancements to Setting Preferences
• C – A new Publish in SIS Room option has been added. When an optimization scenario is published, a course date with this option set will be assigned to the SIS room regardless of availability.
• C – A new Ignore Term Excluded Dates preference is available.
• C – Seat Fill Percentage has been added to the Set Course Preferences tool in the Academic Browser.
• C – A default Building, View or Area Preference can now be specified for an academic unit. This feature automatically sets the building preference for all new course date records synchronized for a specific academic unit.

Enhancements to Manage Terms
• C – A Manage Terms button is now available on the toolbar.
• C – A new Dual mode has been added to Manage Terms that allows you to run Define & Edit Courses and Set Preferences modes concurrently.
Enhancements to Academic Reports

- C – Academic reports can be accessed under Academic Planning > Reports in addition to Reports > Academic Planning.
- C – A new Include Active Scenarios in other Domains option has been added to the Classroom Utilization and Hourly Classroom Utilization reports.
- C – By Academic Unit and By Academic Unit by Instructor formats are now available in the Course List, Course Preferences and Unmet Preferences reports.
- C – A new Academic Space Inventory Report is now available within the Configuration > Rooms area.
- C – Two new reports, Time Block Violations and Time Block Availability/Usage have been added to support the new time block capability within EMS Campus.
- C – A new By Time Block format has been added to the Academic Unit Statistics report. A Seat Fill % column has also been added.
- C – A Trend Report is now available that allows you to compare room utilization across multiple terms.
- C – The following enhancements were made to the Prime Time Usage Report: 1) By Time Block Template option can be applied. 2) A Seat Fill % column has been added to the report. 3) A bar that depicts total number of sections has been added to the Chart – Sections format.
- C – An actual Seat Fill % column has been added to the Over/Under Utilization report.
- C – Three Chart formats (by Building, Room Type and Room Size) are now available in the Classroom Utilization report. Post publish enrollment is also used to determine Seat Fill.
- C – A new Academic Class Meeting Utilization report has been added.

Enhancements to the EMS Campus Planning Interface (Formerly known as the EMS Campus Web Client)

- C – The EMS Campus Web Client is now called the EMS Campus Planning Interface.
- C – A Search for Rooms tool has been developed that significantly simplifies the process of finding an available classroom.
- C – In the Academic Book, the minimum/maximum capacity range is listed next to the room description in the Room dropdown.
- C – The Academic Book can be viewed by Instructor.
- C – Cross-listings, shared space scenarios and conflicts are now displayed consistently between the EMS Campus Planning Interface and the EMS Campus desktop client.
- C – Events can now be seen in the Academic Book post-publish.
- C – Cancelled courses in the Academic Browser are displayed with a strikethrough.
- C – The following reports are now available in the EMS Campus Planning Interface:
  - Course List
  - Instructor Back To Back
  - Instructor Summary
  - Preferences Summary
  - Final Exam Schedule
- C – A Final Exam Required checkbox has been added to the Course Details screen.
- C – Cancelled course/course date records can now be “un-cancelled”.
- C – The Academic Book is no longer visible in Define & Edit and/or Set Preference modes.

What’s New in Virtual EMS

- ALL - A new redesigned version of Virtual EMS Mobile is available with this release. Virtual EMS Mobile provides a crisp user interface that is optimized for viewing in a mobile browser. Users are able to make a room request, view/cancel their bookings and locate colleagues all from their mobile device. Note: Virtual EMS Mobile™ is compatible with most newer generation cellular phones via their web browser. This includes devices running Windows Mobile®, the BlackBerry® smartphone and iPhone®.
- ALL – When selecting a room that is not available for all of the dates requested, an option is now available to quickly search for remaining dates.
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- **ALL** – When viewing location details for a specific room on the Room Request page, a web user can now view the room’s availability (on an Availability tab) in a daily or weekly grid. In addition, the web user can click and drag their mouse over a free slot to add their room to the cart.
- **ALL** – The View My Requests page can now be displayed in a calendar view.
- **ALL** – Web users can now upload/manage attachments on the Room Request and Reservation Summary pages.
- **ALL** – Services can now be displayed on the Room Request page for Video Conference Web Process Templates.
- **ALL** – Two rooms within the same building can now be added for Video Conference Web Process Templates.
- **ALL** – An option to display room User Defined Fields on the Location Details page is now available.
- **ALL** – A default Setup Type can be specified by Web Process Template.
- **ALL** – A web user can now default the available room display (Grid vs. List) on the Room Request page.
- **ALL** – Room and resource alerts (if defined and enabled for Virtual EMS) can now be displayed to web users when selecting a room/resource.
- **ALL** – Service start/end times are now displayed on the Room Request page.
- **ALL** – Default Pricing Plan can be configured by Web Process Template.
- **ALL** – Web users now have the option to apply resources added to an existing service order to related service orders on other bookings.
- **ALL** – An option to enable CAPTCHA for unauthenticated user web requests and web user account requests has been added.
- **ALL** – Phone can now be required on the Create an Account page.
- **ALL** – An option to display a Room Type filter has been added to the Browse Events page.
- **ALL** – An option to suppress location on the Browse Events calendar display has been added.
- **ALL** – Browse Facilities and Browse for Space now display rooms that exist in the Web Process Template(s) that a web user is assigned to in addition to the Unauthenticated User Web Process Template.
- **ALL** – The Private label displayed in free/busy bars can now be relabeled.
- **ALL** – The User ID label on the Log In page can be relabeled.
- **ALL** – Contacts can now be inactivated by a web user in Virtual EMS.
- **ALL** – A Category can now be made unavailable for weekend request
- **ALL** – An option to require a minimum order amount by Category has been added.
- **ALL** – An option to disable the Special Instructions field for a resource has been added.
- **ALL** – Reservation level Comment Types can now be edited on the Reservation Summary page.
- **ALL** – Resource inventory conflicts are highlighted in red.
- **ALL** – The Grid view is now available for Video Conference Web Process Templates.
- **ALL** – An Available on Web setting has been added to groups. This allows an organization to control which groups are displayed on the group look-up screen during the room request process.
- **C** – The 1st Contact field has been relabeled to Instructor in various areas within Virtual EMS.

What’s New in EMS for Outlook

- **ALL** – The ability to select a group and/or contact has been added.
- **ALL** – Terms and Conditions are available.
- **ALL** – Web Process Template and service order date/time restrictions are now honored.
- **ALL** – Video Conference Web Process Templates can now be made available in EMS for Outlook. Additional easy-to-use filtering options have also been added to better support the process of booking a video conference.

What’s New in the EMS Web Client

The first version of the EMS Web Client for this release contains most EMS desktop client end-user functionality. Please note the following exclusions:

- Academic scheduling (i.e. EMS Campus specific functionality)
- Academic Import Utility
· Video Display Interface
· Custom reports
· Custom badges
· Some add-on modules (e.g. EMS-Cisco TMS Interface, AttendanceTracker, EMS BT Interface, etc.)
· Advanced CRM module

A version that includes Configuration, System Administration and some minor areas excluded in the first release (e.g. Query Builder, personal Views, Dashboard Analytics/At-a-Glance and some reports) will be available sometime in Q4 2012.