WHAT’S NEW: DESKTOP CLIENT

Tara Riley
EMS Product Owner

October 27 and 28, 2015
Session Agenda

• Why these enhancements?
• January Release enhancements:
  • Automated Report Delivery
  • User Defined Field Enhancements
  • Notification Rule Enhancements
  • Easy Deployment of Desktop Client
  • Booking-Level Check-In – *Will be reviewed in another session.*
• Future of the EMS Client
• Q&A
Why These Enhancements?

- Delivering value on the promise of “greatest breadth and depth of functionality”
- Obtained from customer feedback
- Available in January 2016
Automated Report Delivery – Overview

• Saves time for those who need ongoing access to updated reports

• Eliminates the need to create certain User accounts
## Which Reports?

<table>
<thead>
<tr>
<th>Report Area</th>
<th>Automated Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>Yes</td>
</tr>
<tr>
<td>Sales</td>
<td>Yes</td>
</tr>
<tr>
<td>Statistics</td>
<td>Yes</td>
</tr>
<tr>
<td>Other</td>
<td>No</td>
</tr>
<tr>
<td>Exceptions</td>
<td>No</td>
</tr>
<tr>
<td>Billing</td>
<td>No</td>
</tr>
<tr>
<td>Hoteling</td>
<td>No</td>
</tr>
<tr>
<td>Academics</td>
<td>No</td>
</tr>
</tbody>
</table>
### Which Queries?

<table>
<thead>
<tr>
<th>Query Filter Type</th>
<th>Automated Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservation</td>
<td>Yes</td>
</tr>
<tr>
<td>Sales/Statistics</td>
<td>Yes</td>
</tr>
<tr>
<td>Billing</td>
<td>No</td>
</tr>
<tr>
<td>Group</td>
<td>No</td>
</tr>
<tr>
<td>Course</td>
<td>No</td>
</tr>
</tbody>
</table>
Automated Report Delivery – Configuration

- New security process: Define & Edit Automated Report Delivery
- Accessible from Reports > Automated Report Delivery
- Can only be scheduled for “saved” reports (formerly known as memorized reports) or queries
Automated Report Delivery

- Email at scheduled day/time
  - PDF attachment for Daily, Sales, Statistics reports
  - Excel spreadsheet attachment for Queries
- Output is identical to running report in EMS
- If no data is available for the reporting period, a message will be delivered to that effect.
# Automated Report Delivery – Sample Email

## Enterprise

<table>
<thead>
<tr>
<th>Res Start</th>
<th>Evt Start</th>
<th>Evt End</th>
<th>Res End</th>
<th>Location / Event</th>
<th>Setup / Event Type</th>
<th>Employee</th>
<th>Status</th>
<th>EC</th>
<th>Res ID</th>
<th>Book ID</th>
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<tbody>
<tr>
<td>Monday, October 19, 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00 AM</td>
<td>6:00 AM</td>
<td>5:00 PM</td>
<td>5:00 PM</td>
<td>DEN Mt. Evans</td>
<td>Classroom (30)</td>
<td>Shank, Jason</td>
<td>Confirmed</td>
<td>40519</td>
<td>97090</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>EMS Workplace Training</td>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Catering - Delivery Service (30) from 7:30 AM to 9:00 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Catering - Delivery Service (30) from 11:00 AM to 1:00 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Catering - Delivery Service (30) from 3:00 PM to 5:00 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:30 AM</td>
<td>11:00 AM</td>
<td>1:00 PM</td>
<td>1:30 PM</td>
<td>DEN Pikes Peak</td>
<td>Conference (10)</td>
<td>Newton, Wendy</td>
<td>Confirmed</td>
<td>40703</td>
<td>97023</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>EMS 6.0 Presentation</td>
<td>Video Conference</td>
<td>Montoya, Julie</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
User Defined Field Enhancements – Overview

• Offers increased flexibility when creating forms with questions

• Two enhancements:
  • Multi-Select from a list
  • Dependency between a list-type UDF and another UDF

• Results in easier-to-use web forms (Web Process Templates) for the everyday user
Demo: User Defined Field Enhancements

- Show Web App (Virtual EMS) before
  - Lots of extra steps and space.
- Show Web App after UDF enhancements
  - Consolidated selections
  - Shortened form with UDF dependency
User Defined Fields from the Web App

EMS Version 7 – UDFs in the Web App

EMS January 2016 – UDFS in the Web App
Other Information

Will you require any technical assistance to start or service your training?: *
    Yes

Will you need assistance with the projector and/or screen?: *
    Yes

Will you need assistance with the Smart Board?: *
    No

Will you need assistance with the document camera?: *
    No

Will you need assistance with audio/sound?: *
    No

Will you need this session recorded?: *
    Yes

Other Information

With which items would you like assistance?:
- [ ] Projector/Screen
- [ ] Document Camera
- [ ] Smart Board
- [ ] Audio/Sound
- [x] Session Recording
Demo: User Defined Field Enhancements

- Configuration: Multi-Select List-Type UDF
- Configuration: Dependency on List-Type UDF
- Application: Reservation Wizard and Navigator
Notification Rule Enhancements – Overview

• Notifications are essential for workflow.
• Flexibility and granularity are key.
• January enhancements are those with the biggest impact.
Notification Rule Enhancements – Service Orders

- Specify trigger based on Service States
- Specify trigger based on Grouping or Resource
Notification Rule Enhancements – Bookings

• Specify trigger based on Setup Type
  • New, changed, or canceled Bookings if rule already tied to the Setup Type.
  • Bookings changed to a Setup Type on a rule
Notification Rule Enhancements – Miscellaneous

- Applies to all (or almost all) notification rules:
  - Event Coordinator or Web User as dynamic role-based recipient
  - Rules can be based on hours before an event instead of days
  - Group users tied to rule – option to override
Easy Deployment of Desktop Client – Overview

Reducing time and resources to install/update client software means updates can be adopted more frequently.

• Easy “one-click” installation – no elevated privileges needed
• Minimal IT support needed for distribution, installation, and updates
• Can be installed on any machine, if Desktop Client Web Service is accessible.
Easy Deployment of Desktop Client – Process

- IT installs Desktop Client Web Service.
  - Sends link or URL to users.
  - Prompt for installation when user reaches the URL.
- Server and database name appear at the top of the screen.
- Can change databases easily between test and production sites.
- Updates occur after IT installs newer version of the Desktop Client Web Service.
Desktop Client Installation Screen

EMS Desktop Client Installation Instructions

Download and install the Desktop Client from the "Install EMS" link below.

Install EMS

When the installation is complete, a shortcut to the Desktop Client will appear on your desktop. You will also be able to start the Desktop Client via your Start menu.

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Installation in Progress

EMS Desktop Client Installation Instructions

Download and install the Desktop Client from the "Install EMS" link below.

When the installation is complete, the EMS icon will appear on your desktop.

You will also find the EMS icon in your "Programs" menu.

© 2015 Dean Evans and Associates LLC. All rights reserved.
Login Window and Desktop Client Screen remain the same.
Automated Updates
Recap

• Enhancements We’ve Reviewed:
  • Automated Report Delivery
  • User Defined Field Enhancements
  • Notification Rule Enhancements
  • Easy Deployment of Desktop Client
• January 2016 Release
• Delivered through the Desktop Client (not the Web Client)
## System Requirements

<table>
<thead>
<tr>
<th>Operating System</th>
<th>v7</th>
<th>Jan-16</th>
<th>Jun-16</th>
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<tbody>
<tr>
<td>Microsoft Vista</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windows 7 (32-bit and 64-bit)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Windows 8 (32-bit and 64-bit)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Windows 8.1 (32-bit and 64-bit)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Windows 10 (32-bit and 64-bit)</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

.Net Framework Version

<table>
<thead>
<tr>
<th></th>
<th>3.5</th>
<th>4.5.2</th>
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What Features are Available in My Product?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Workplace</th>
<th>Campus</th>
<th>Enterprise-Level</th>
<th>Professional</th>
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</thead>
<tbody>
<tr>
<td>Automated Report Delivery</td>
<td>X</td>
<td>X</td>
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<td>User Defined Field Enhancements</td>
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<td>X</td>
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<td>Notification Rule Enhancements</td>
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<tr>
<td>Easy Deployment of Desktop Client</td>
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<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Booking-Level Check-In</td>
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<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Roadmap

- Additional reports for automated delivery
- Future: Ability to custom-build notifications based off of any filter criteria.
- New Web Client
- Mobile App for Operational Users and Service Providers
Questions?
Additional Session Recommendations

- What’s New in…
  - Mobile App
  - Web App
  - EMS for Outlook
- Gain Utilization Insights by Instituting Booking-Level Check-In
WHAT’S NEW: DESKTOP CLIENT

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