REVIEWING SERVICES

Accessing Services from Manage Services Icon	1
Accessing Services from Dashboard Notifications	4
COMMUNICATION AND CONFIRMATION	6
Confirmation Email	6
Creating Confirmation Templates	6
Sending Emails from Reservations	9
WORKING WITH QUERIES	9
Create a Query	9
WORKING WITH REPORTS	12
VIDEO TUTORIALS	15



1

REVIEWING SERVICES

Venue managers and everyday users are able to request services from service providers through Reserve West. Service providers use the Reserve West Desktop Client to review requested services. Service providers can access requests services through either the Manage Services Icon or from Dashboard Notifications.

Accessing Services from Manage Services Icon

Services Providers at the University of West Georgia use Manage Services to search for and view the resources with and without service orders for all bookings on a particular day as well as the current state of the resources and their Reviewed status. After viewing a resource, if applicable, you can change the state for a resource. You can review a resource, or you can mark a resource as un-reviewed. You can also open a resource in the Navigator, and edit it if necessary.

The following steps navigate users through viewing, approving, or denying service requests in Reserve West.

 Navigate to the Manage Services browser by clicking the Manage Services icon from the toolbar in EMS Desktop Client.



2. Configure the setup to view only the service orders under your supervision.



tart Date: 2/2/	/2019 Wed	-	Building:	Building	(-11)		\sim				
ind Date: 2/27	7/2019 Wed	•	Categov:	UWG-M	ultimedia Equipment	t					
Status (20)			a column he	ader here to	group by those sold						Change Stat
] (all)			State	Reviewed	Date	Group			Building		Reviewed
Academic Bumpe	ed		(none)		2/27/2019 Wed	"Sigma Gamn	na Rho Soroi	rity, Inc"	Outdoor V	enues	Unreviewed
Academic Cancelled Academic Confirmed Academic Conflict Academic Conflict Academic Crosslist/S		(none) (none)		2/27/2019 W 2/27/2019 W	Career Servic Career Servic	386 3 8 6		Coliseum Human - H	UMANITIES 4	Open	
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Cancelled Confirmed Confirmed Confirmed - Priva Denied Mass lafe Require	ate	××	(none) (none) <i>(none)</i> <i>(none)</i>	¥es	2/27/2019 W 2/27/2019 W 2/27/2019 2/27/2019	Team Jesus UREC Admir Career Servi Student Invo	Ministries istration E&C ces Avement	à	Paffrd - SC Coliseum Campus G AURSING	DCIAL SCIENCE Iontor S-BUILDING	Print
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Approved Denied Faculty Approvei Partial Approval Pending Addition Pending Advisor Pending Review	d nal Informatic Approval	Z	Sequence 0	Resour	rce rs or sound system	Quantity 1	Price \$0.00	Notes		Special Inst	

- 3. Select the fields in which you want to filter by. Users can view by building, date, event status, and the state of the service requested.
- 4. Once the Manage Services window is configured to the user's preference, a list of all events requesting their service will be displayed.





- 5. Click Open to review the reservation information.
- 6. After reviewing the reservation, the user can then change the state of the reservation. To do so, click the booking for the date under the reservation umbrella. There will be a list of all services requested. Choose the service in your area.



7. Change the State of the service.



uxiliary Service	s Approval Audit			
Reviewed				
State:	(none)	~]	
	2.			

Accessing Services from Dashboard Notifications

1. If there are new requests for your service, the Dashboard light will appear red. Select the Dashboard icon to continue.



2. Select our notification rule.



Show New Only Votification Rule (5)		Notification Date (0)	🔺 Туре	Booking Date	Start	End	Building	Room	Group	Group Type	Event	Status	Category
cademic Classrooms - New Reservations cademic Classrooms - Reservation Cb U cademic Classrooms - Risk Map Oproval 0 ood Service Approval 0													
Notifications	~		Any re appea	eservation Ir here. O	n with pen t	i a se he re	rvice r servat	eques ion to	t for y reviev	our area w the rea	will quest.		
Course Updates													
© Reminders													
Everyday User Reservations*													
Reconfirm Dates													
Building Hours Exceptions													
Analytics													

- 3. Click Go To to review the reservation.
- 4. After reviewing the reservation, the user can then change the state of the reservation. To do so, click the booking for the date under the reservation umbrella. There will be a list of all services requested. Choose the service in your area.





5. Change the State of the service.

Auxiliary Ser	vices Approval	0-0		X
Auxiliary Service	s Approval Audit			
Reviewed				
State:	(none)	~		
		ОК	Car	ncel

COMMUNICATION AND CONFIRMATION

Confirmation Email

Although the title contains "confirmation," the Confirmation feature can be used to send out email communication in pre-configured templates. Using the Confirmation feature within the reservation allows the emails to be tracked within the reservation.

Creating Confirmation Templates

To create confirmation templates, select Reservation > Other > Confirmations. For the setup, select (user specified). Build your template and then save it.



EMS Software V44.1 - prod-sql-ep/westga_prod_ems		
File Settin Reservations Reports Billing Confi	guration Academic Planning System Administration Window Help	
Book Calendar Wizard Navigator Browser Everyday Use	er Reservations Groups Email Academic Browser Academic Book Manage Terms Dashboard	
Confirmation		
Setup: (user specified) Save Edit Copy Word Merge Setups Options	
Date Hong Denting	s categories Statuses Options	
Department:	Academic Affairs 🗸	
Starting Date:	5/5/2019 🗸	
Ending Date:	5/5/2019 -	
Use Specific Times:		
Format:	By Booking Date ~	

- 1) Select your department.
- 2) Select the buildings in which you manage space.
- 3) Add the categories (services) that you use within your space.
- 4) Select the appropriate status. Example: If you are building a Confirmation email, only select the confirmed statuses. If you are creating a Pending email, only select one of the pending statuses.
- 5) Options:
 - a) Confirmation Title this will go at the top of the PDF, so make sure it applies to the type of email you are sending.
 - b) Header Message you will need to create the body of your email as the Header Message. To do so, follow these steps:
 - i) Configuration > Other > Messages
 - ii) Select New



Messages		
Messages (41)	- 6	New
Academic - Course Location Change		
Academic - Event Reminder		
Academic Classroom Confirmation		Delete
Academic Confirmation		Print
Academic Pending Priority		
Academic Scheduler Footer		
Academic Space Approvals Needed		
Academic Space Approvals Pending		
Academic Space Request Denied		
Academic Space Reservation Cancelled		
Academic Space Room Change		
AUX- Cancellation Policy		
AUX-External FUA Rules and Regs KC		
AUX- External Initial Response Email		
AUX- Pending Status Fundraising/Food Form		
Aux-Services Kennedy Chapel Approval	-	Close

- iii) Type your message as you would like for it to appear in the body of the email.
- c) Footer Message it is common practice to use this as your UWG email signature. This message is set up in the same steps listed above.
- d) Select "Print User Defined Fields" if you want them to appear in the body of the email. If not, they will appear only in the attached PDF.

Sending Emails from Reservations

- 1. Open the reservation.
- 2. Review the reservation details and the services requested.
- 3. Click the "Confirmation" button on the left side.



Helping Humanity General F	Rody Meetin	a (Recenuatio	on No. 33105)			(4.0)		-	A 11 - 1	FILL	
10/9/2019 Wed 5:30	Jody Meetin	Reserva	tion Summary	Use Use	r Defined Field:	oroperties	199	Transactions (0)	lers (0)	Comr	ents (0)
	Event Na Group: Primary F Phone: Reservat	ame: ^p oint of C tion No.:	Helping Hur Helping Hur Hill, Akeria 478457792 33105	nanity Ge nanity 5	neral Body I Statu Ever Sales Ever	Meeting s: Cor t Coordin (not sperson: (not rday User: Hill	ne) ne) ne) , Ake	ed eria			Edit Confirmation Change Status Update Pricing
	Drag a col	lumn header	here to group	by that co	lumn					- /	New
		Date	Start	End	Building		1	Room	Event		Edit
		10/9/2019	Wed 5:30 PM	7:30 PM	TLC -TECHN	OLOGY LEARN	CTR	1200 CLASSROOM	Helping Humanity Gen	eral Body Mee	Delete
											Tools
											Details
											Confirmation
		1 Reco	ords								
>		- 1								Þ	Close

4. Select your setup in the dropdown and then select "Email."



Confirmation Mult	timedia Servi res - Follow -	ces - Follo	ow Edit (Сору	Word Mer	'OP	Setuns	Options		×
Date Range Buildings	Categories	Statuses	Option	s Email	Options	3.	octupo	options	2	
Department:	Information T	echnology	Services	5	~					
Reservation ID:	33105									
Booking ID:	0									
Starting Date:	10/9/2019	•								
Ending Date:	10/9/2019	•								
Use Specific Times:										
Close			(Ema	Сорі	ies To Print:	1	Print	Print Prev	iew

5. Compose your message and click "Send."



- - **-**Navigator - Helping Humanity General Body Meeting (Reservation No. 33105) Open Reservation View Alerts Print Refresh Settings E--- I Helping Humanity General Body Meeting (Reservation No. 33105) Transactions (0) History* Email (2) 10/9/2019 Wed 5:30 Reservation Summary Reminders (0) O Con 😜 Properties Edit Event Name: Helping Humanity General Body Meeting Confirmed Group: Helping Humanity Status: Confirmation Primary Point of C... Hill, Akeria Event Coordin... (none) 4784577925 Phone: Salesperson: (none) Change Status Reservation No .: 33105 Everyday User: Hill, Akeria Update Pricing New Fdit Date Start End Building Room Event Delete 10/9/2019 Wed 5:30 PM 7:30 PM TLC -TECHNOLOGY LEARN CTR 1200 CLASSROOM Helping Humanity General Body Mee Tools Details Confirmation 1 Records Close
- 6. After sending, you will be able to locate this email under the Email tab in the reservation.

WORKING WITH QUERIES

A query is the primary mechanism for retrieving information from a database. A query consists of questions that are presented to the database in a predefined format. A Query Builder function is available from the Reports menu. You can use this function to create queries for retrieving information from your EMS database. When you create a query, you can name and save the query so that you can run the query at any time that you choose. You can create a query from a newly created query, or you can create a query by copying an existing query and editing the copied query as needed. You can also edit a query, delete a query, and view and print a query's filters.



Create a Query

 On the EMS menu bar, click Reports > Queries > Query Builder. The Query Definitions dialog box opens. The dialog box displays all the queries that have been previously defined in your EMS database and that have a status of Active.

Query Definitions (7)	Туре	Owner	New
Events by Building	Sales/Statistics	Bob Scheduler	Edit
No Show Stats	Sales/Statistics	Ed Nowak	Delete
NY - Booking by Room Type	Sales/Statistics	Bob Scheduler	Diet
oom availability	Sales/Statistics	Bob Scheduler	Print
Special Monday Meetings	Reservation	Dean Evans	Сору
Test	Reservation	Bob Scheduler	Bup
Fest2	Reservation	Bob Scheduler	Chow
			M Active
			Inactive

- 2. Do one of the following:
 - a. To create a query from scratch, click **New**.
 - b. To create a query by editing an existing query, select the query that is to be edited, and then click **Copy**.



😤 Query Builder Filter		- • ×
Query Builder Filter Display Fields F	iter Sort Chart Users Results Audit	
Filter Name:		
Filter Type:	Reservations -	
Display In Browser:	(Browser Uses Display Fields Only, Not Filter)	
Open In Navigator:	(none) v	
Owner:	SysAdmin 👻	
Return First 'xx' Number Of Records:	0	
Inactive	Preview 🎸 Spelling OK	Cancel

- 3. Enter or edit the needed information for the query. See:
 - a. Query Builder Filter tab
 - b. Display Fields tab
 - c. Filter tab
 - d. Sort tab
 - e. Chart tab
 - f. <u>Users tab</u>
- 4. Do one of the following:
 - a. Click **OK** to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.
 - b. Open the **Results** tab, and then click Preview to run the query immediately and view the results on the tab. You can then click **OK** to close the Query Builder Filter dialog box and save the named query. The named query is displayed on the Reports menu under the Queries option. You can run this query at any later date when needed.



WORKING WITH REPORTS

EMS is able to send reports daily to selected email addresses. Reports that can currently be automated to send are Reservation and Sales\Statistics Queries and all Saved Daily and Statistics Reports under the EMS Reports menu. To learn more read about creating Queries or Saved Reports. Automated Reports can be set up and emailed to selected individuals. Automated Reports use predefined Queries and Saved Reports. An email will be sent to the users defined in the Automated Report Delivery with either the information requested through the report, or with an email stating there was no data to display.

 On the EMS menu bar, click Reports > Automated Report Delivery. The Automated Report Delivery window opens. This window lists all Automated Reports that are currently configured in your EMS database and that have a status of Active.

2. Click New. The Automated Report window opens.



🛞 Automated Repor	rt					×
Automated Report A	udit					
Description:						
Automated Repo O Query O Saved Re	rt Type	Saved Report Report Section: Report Type: Saved Report:	(all) ~ (all) ~			
Frequency Daily O Wee Weekdays Or	akly () Monthly					
Send Report At: Reporting Period:	Today	Zone:			~	
Email From: Email Subject:			*Leave Email From blank to use global setting	- Subject Legend %1% = Reporting	j g Period	
Email Recipients -						-
Email Address:				Add		
Email Address (0)				Remove		
Inactive				OK	Can	icel

- In the Description field, enter a name or description for the new Automated Report. The Automated Report Delivery description should specify the type of delivery, such as "Daily Event Schedule Delivery."
- 4. Specify if this report is a Query or Saved report.

Automated Report Type	Query Query Type:	~
◯ Saved Report	Query:	~



5. Specify Frequency

Frequency Daily O Wee	ikly 🔿 Monthly	
Weekdays Or	ily	
Send Report At:	Time Zone:	~
Reporting Period:	Today ~	

- a. Daily/Weekly/Monthly: Determines the frequency that the report will send.
- b. Daily: will send every day at the specified time.
- c. Weekly: Can be set to a single day every week or multiple days every week.
- d. Monthly: Can specify a specific day each month (1-28) or the last day of the month.
- e. Send Report At: Determines the time each day that the Automated Report will send.
- f. Time Zone: Determines the time zone for the time selected for the report to send. Time and Time Zone correlate to the database server and the server on which the Automated Report Service is installed.
- g. Reporting Period: Determines the dates which the report will be automated for. Choose from multiple options in the drop-down list to customize the reports.
- 6. Specify Email Settings/Recipients

*Leave Email From blank to use global setting	
	%1% = Reporting Period
	Add
	Remove
	Leave Email From blank to use

a. Email From: Enter the Email From address for the Automated Report.



- b. If you leave the Email From field blank, then the Email From address entered in the EMS Automated Report Service is used.
- c. Email Subject: title for the email that will contain the Automated Report.
- d. If the Subject line is left blank the Automated Report description will be used as the email subject.
- A variable can be used to put information into the subject line as described in the Legend. %1% is the code for the Reporting Period, so "Event Schedule for %1%" results in "Event Schedule for Tomorrow" being displayed in the subject line.
- f. Email Address: You can look up Email Addresses by clicking the Add button, which selects from the Global Address Book. In the Email Address field, for each user and/or group that is to receive the Automated Report, enter the appropriate email address, and then click Add.

VIDEO TUTORIALS

- Managing Services <u>https://youtu.be/yYBMWn3us3w</u>
- Common Reports in Reserve West <u>https://youtu.be/v9bNvIoGjXw</u>
- Configuring Automated Reports <u>https://www.youtube.com/watch?v=Ojs8tgYqsY4&feature=youtu.be</u>

