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RESERVE WEST



REVIEWING SERVICES

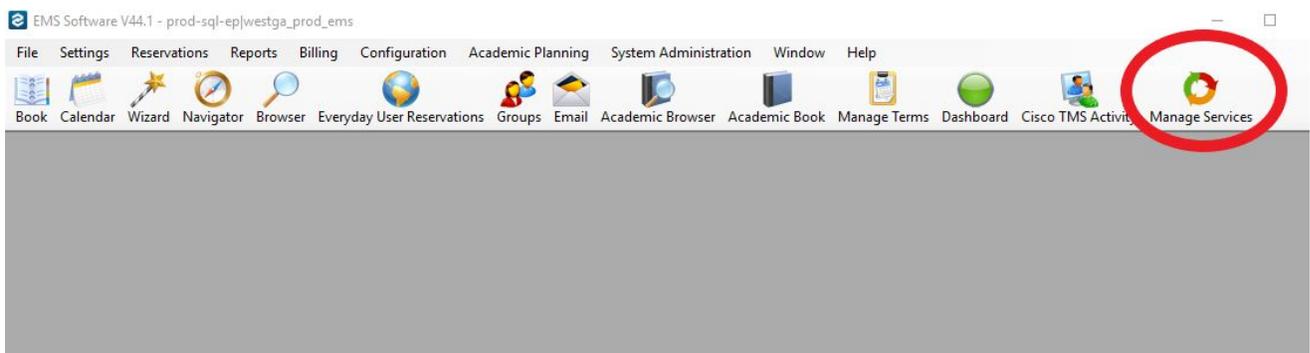
Venue managers and everyday users are able to request services from service providers through Reserve West. Service providers use the Reserve West Desktop Client to review requested services. Service providers can access requests services through either the Manage Services Icon or from Dashboard Notifications.

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.

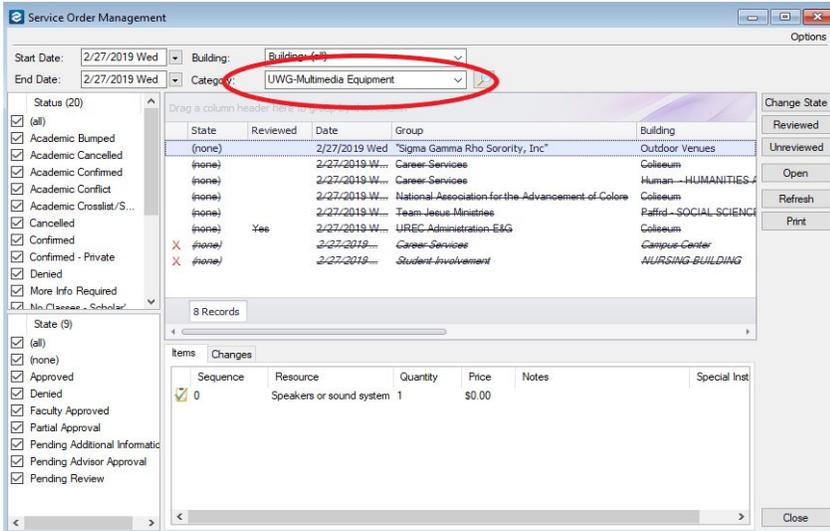
1. Navigate to the Manage Services browser by clicking the **Manage Services** icon from the toolbar in EMS Desktop Client.



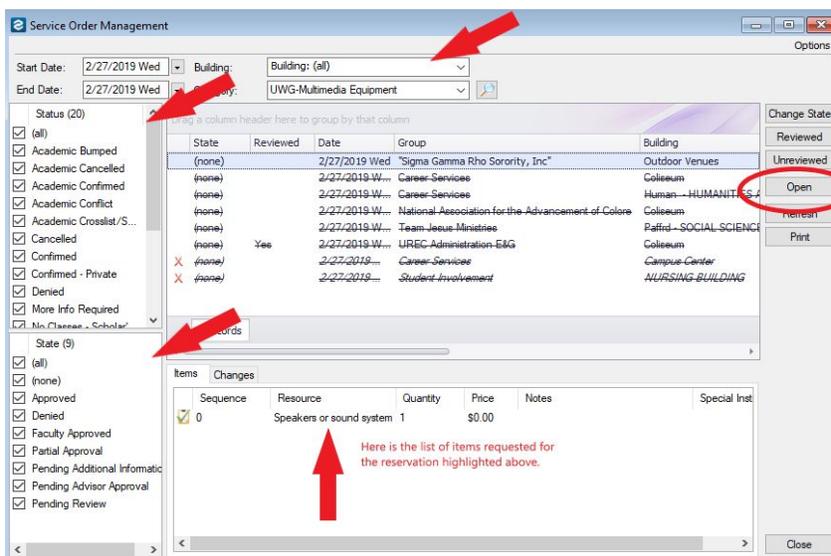
2. Configure the setup to view only the service orders under your supervision.

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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.



- Click Open to review the reservation information.
- 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.

Navigator - Sigma Cares (Reservation No. 25966) (Booking No. 611541)

Open Reservation View Alerts

Print Refresh Settings

Attachments (0) Drawings (0) User Defined Fields (0) History*

Booking Summary Properties Reminders (0) Comments (0)

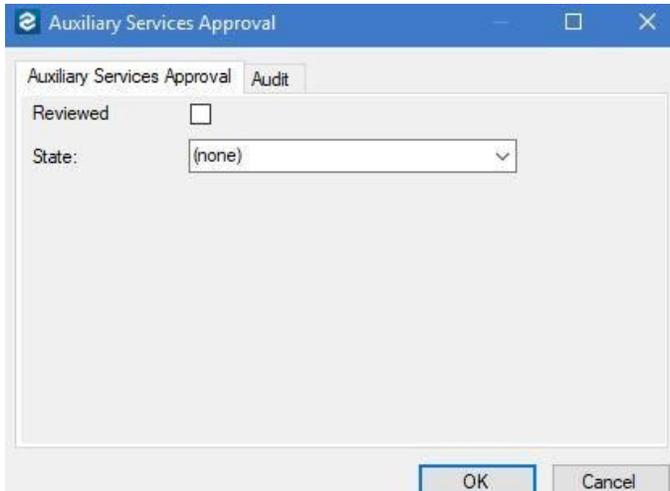
Date: 2/28/2019 Thu Event Name: Sigma Cares
 Reserved: 11:15 AM - 2:15 PM Location: Outdoor Venues - Grassy Triangle 3
 Event: 11:15 AM - 2:15 PM Event Type: Fundraiser
 Setup Type: Booth Setup Status: Confirmed
 Booking No.: 611541 Setup Count: 6

2/28/2019 Thu 11:15 AM - Grassy Triangle 3

Category	Service	Start	End	Reviewed	State
Auxiliary Services Approval	(none)				Approved
CSI Approval	(none)			Yes	Approved
Food Services Approval	(none)				Approved
Risk Management Approval	(none)			Yes	Approved
UWG-Multimedia Equipment	(none)				Approved
UWG-WIC	(none)				Approved

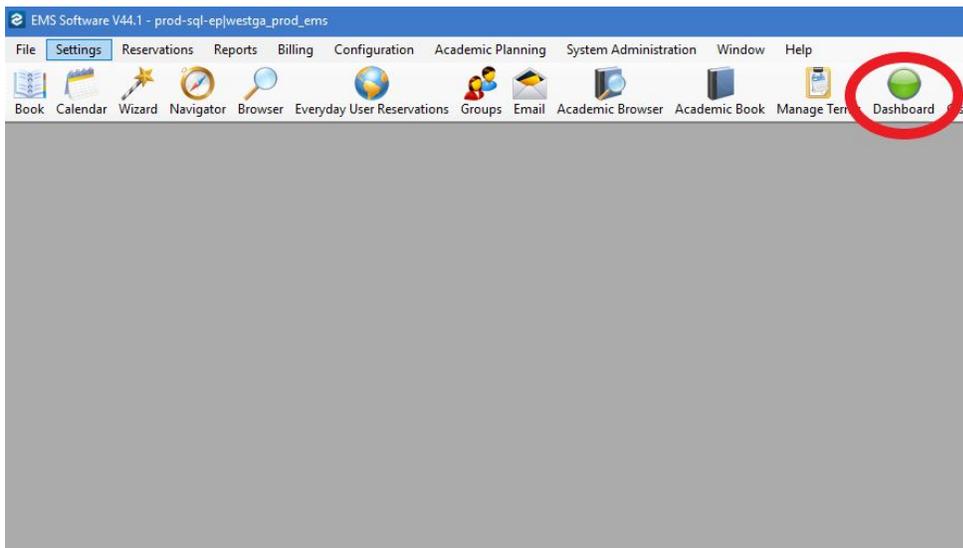
6 Records

- Change the State of the service.



Accessing Services from Dashboard Notifications

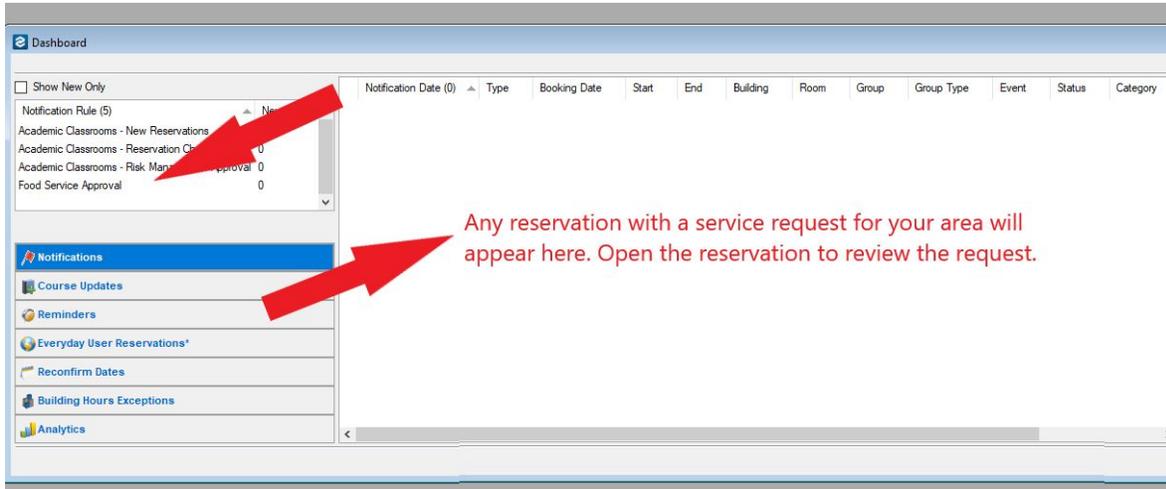
1. If there are new requests for your service, the Dashboard light will appear red. Select the Dashboard icon to continue.



2. Select our notification rule.

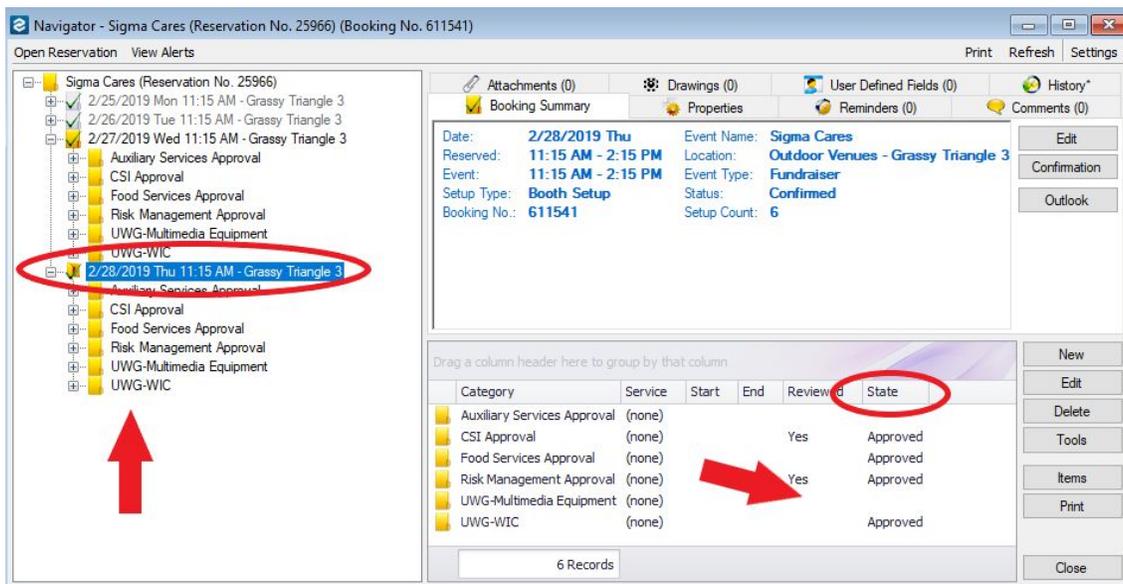
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3. Click Go To to review the reservation.

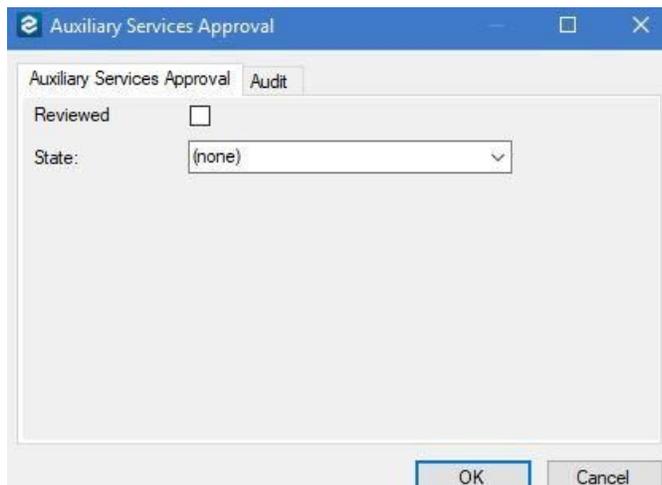
4. After reviewing the reservation, the user can then change the state of the reservation. To do so, click the booking for the date under the reservation umbrella. There will be a list of all services requested. Choose the service in your area.



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5. Change the State of the service.



COMMUNICATION AND CONFIRMATION

Confirmation Email

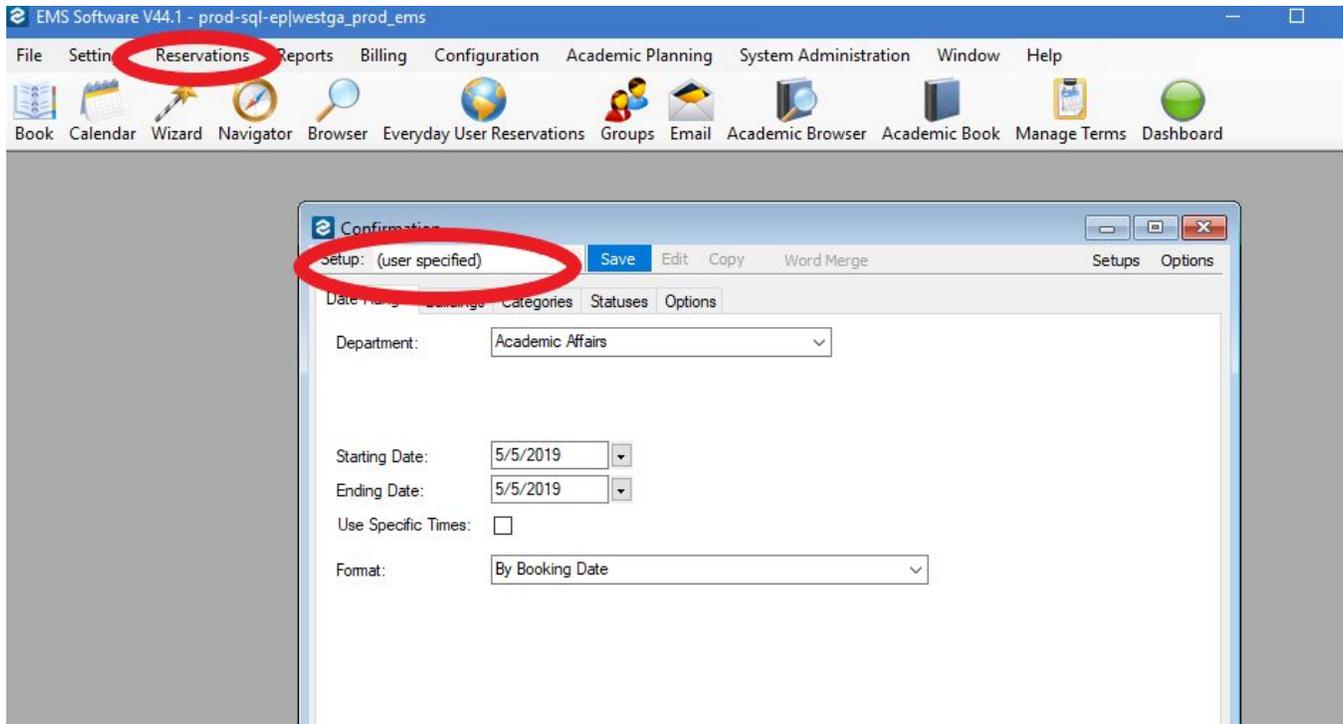
Although the title contains “confirmation,” the Confirmation feature can be used to send out email communication in pre-configured templates. Using the Confirmation feature within the reservation allows the emails to be tracked within the reservation.

Creating Confirmation Templates

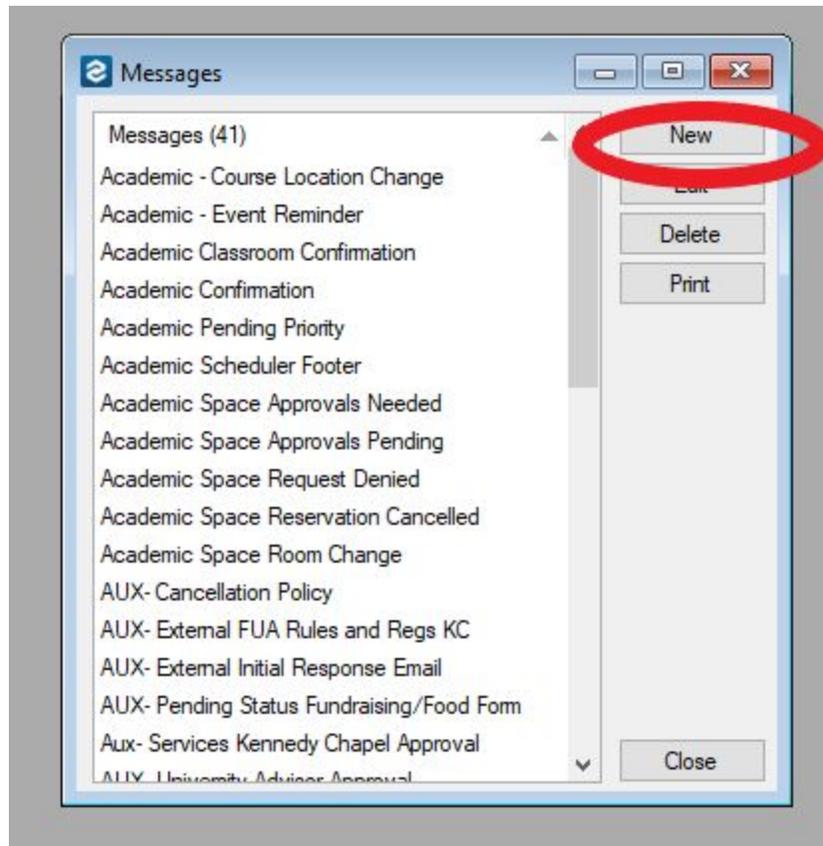
To create confirmation templates, select Reservation > Other > Confirmations. For the setup, select (user specified). Build your template and then save it.

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- 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



- 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.

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Navigator - Helping Humanity General Body Meeting (Reservation No. 33105)

Open Reservation View Alerts Print Refresh Settings

Helping Humanity General Body Meeting (Reservation No. 33105) 10/9/2019 Wed 5:30

Reservation Summary Properties Reminders (0) Comments (0)

Event Name: **Helping Humanity General Body Meeting** Status: **Confirmed**

Group: **Helping Humanity** Event Coordin... **(none)**

Primary Point of C... **Hill, Akeria** Salesperson: **(none)**

Phone: **4784577925** Everyday User: **Hill, Akeria**

Reservation No.: **33105**

10/9/2019 Wed 5:30 PM 7:30 PM TLC -TECHNOLOGY LEARN CTR 1200 CLASSROOM Helping Humanity General Body Meeting

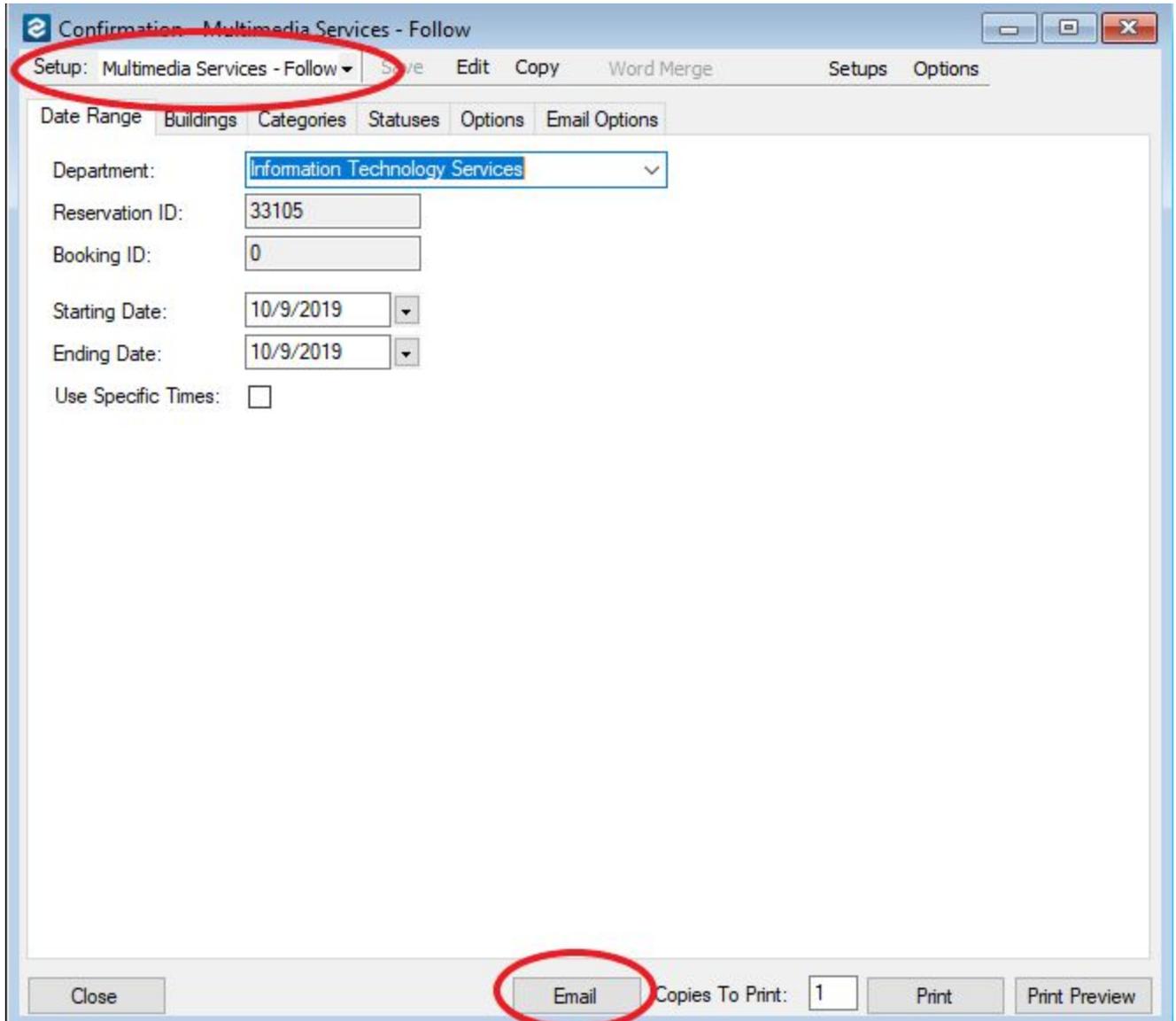
1 Records

Confirmation

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

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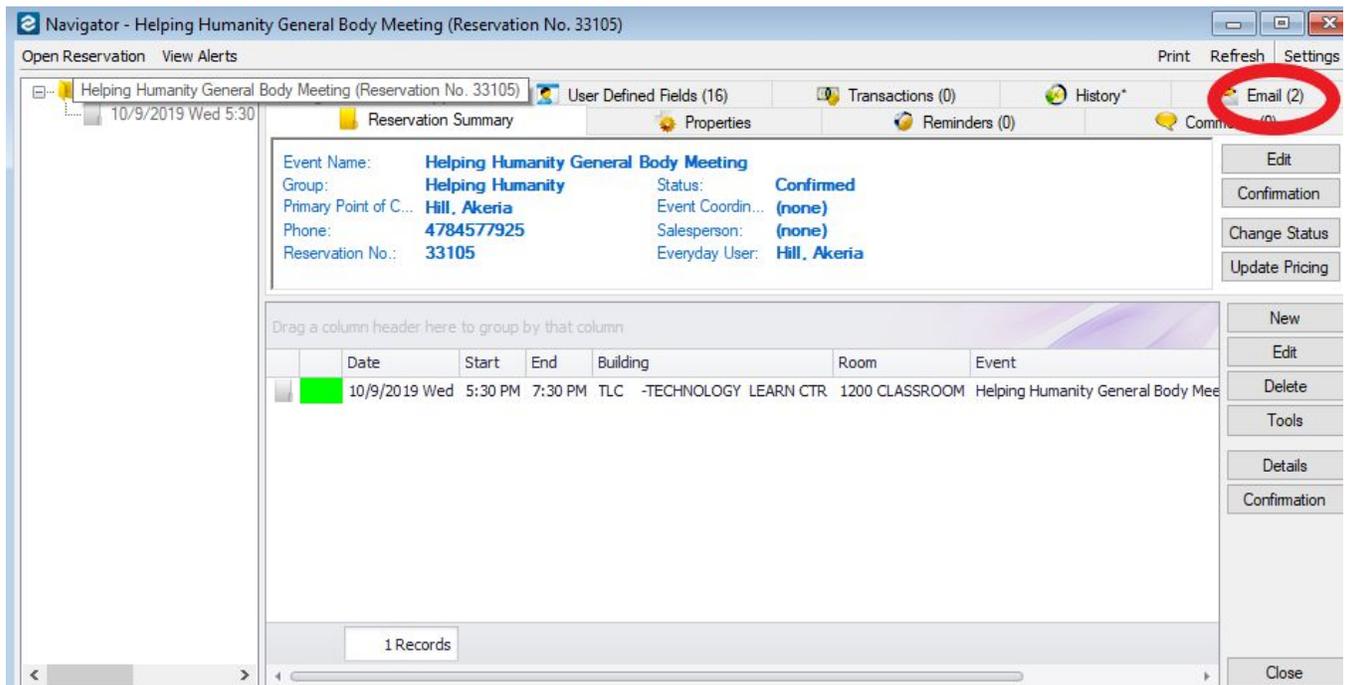


5. Compose your message and click “Send.”

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6. After sending, you will be able to locate this email under the Email tab in the reservation.

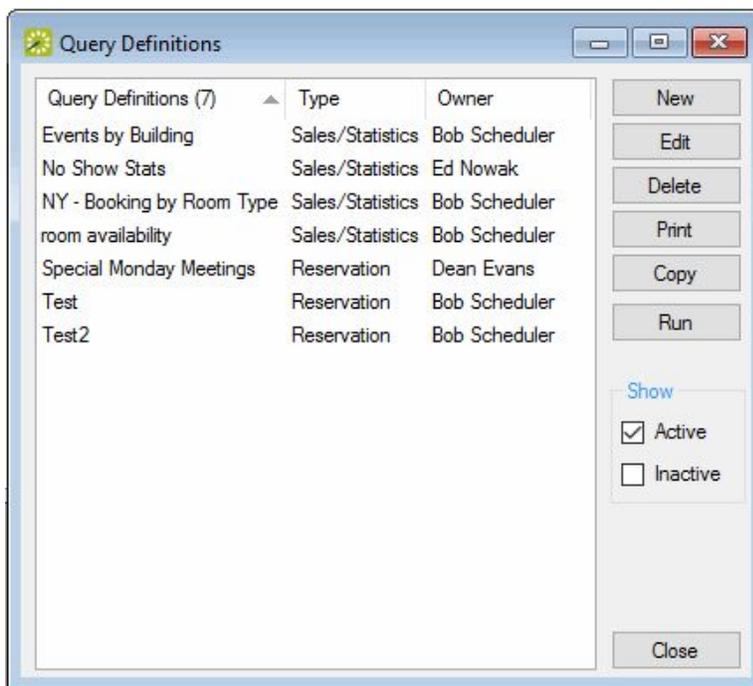


WORKING WITH QUERIES

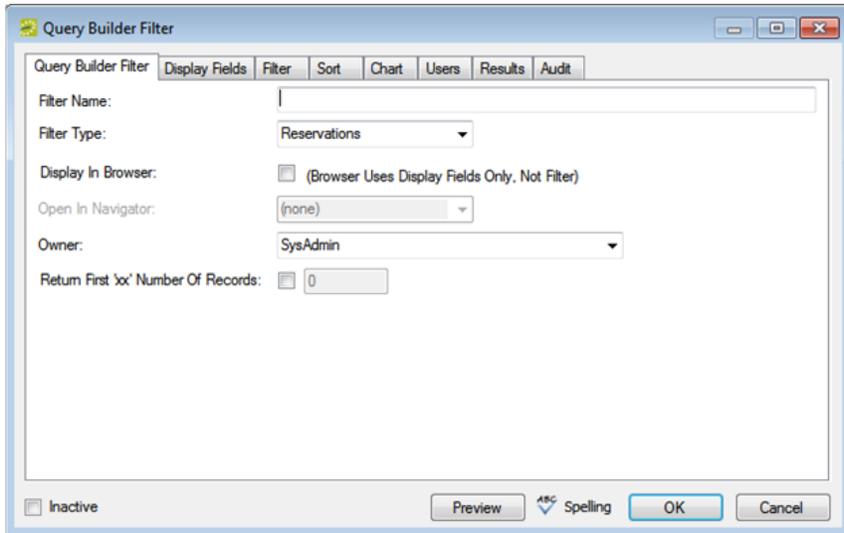
A query is the primary mechanism for retrieving information from a database. A query consists of questions that are presented to the database in a predefined format. A Query Builder function is available from the Reports menu. You can use this function to create queries for retrieving information from 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

1. 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.



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**.



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. Users tab

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.

1. 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.

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Automated Report

Automated Report Audit

Description:

Automated Report Type

Query

Saved Report

Saved Report

Report Section: (all)

Report Type: (all)

Saved Report:

Frequency

Daily Weekly Monthly

Weekdays Only

Send Report At: Time Zone:

Reporting Period: Today

Email Settings

Email From: *Leave Email From blank to use global setting

Email Subject: Subject Legend
%1% = Reporting Period

Email Recipients

Email Address: Add

Email Address (0) Remove

Inactive

OK Cancel

- 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."
- Specify if this report is a Query or Saved report.

Automated Report Type

Query

Saved Report

Query

Query Type:

Query:

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5. Specify Frequency

Frequency

Daily Weekly Monthly

Weekdays Only

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

Email Settings

Email From: *Leave Email From blank to use global setting

Email Subject: Subject Legend
%1% = Reporting Period

Email Recipients

Email Address: Add

Email Address (0) Remove

- 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.
- e. 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 – <https://youtu.be/yYBMWn3us3w>
- Common Reports in Reserve West - <https://youtu.be/v9bNvloGjXw>
- Configuring Automated Reports - <https://www.youtube.com/watch?v=Ojs8tgYqsY4&feature=youtu.be>

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