

Processing new reservation requests via the Dashboard.

Open the dashboard by clicking on the "Dashboard" option on the top menu bar. The Dashboard will appear.

The screenshot shows the EMS Software V44.1 Dashboard. The top menu bar includes File, Settings, Reservations, Reports, Billing, Configuration, Academic Planning, System Administration, Window, and Help. The Dashboard window is open, displaying a list of reservation requests. The left pane shows a list of Notification Rules, with 'CPSM Classroom Web Request' selected. The right pane shows a table of reservation requests with columns for Notification Date, Reservation ID, Group, Group Type, 1st Contact, Event Name, Event Type, and Status. A 'New Bookings' section is also visible at the bottom of the dashboard.

Notification Date (21)	Reservation ID	Group	Group Type	1st Contact	Event Name	Event Type	Status
9/28/2018 11:20 AM	887159	Institute for Robotics and Intelligent Machines	Department	Jordan, Cynthia B	RobotJackets Kickoff Event	Special Event	Custodial Fee Due
10/2/2018 11:31 AM	888478	College of Engineering	College of Engineering	Trice, Cedric	GT Engineering Olympics	Outreach Event	Custodial Fee Due
10/15/2018 2:35 AM	891599	Ramblin' Reck Club	Student Group	DeJonge, Matthew M	Ramblin' Reck Club Fall Voting	Meeting	Custodial Fee Due
10/16/2018 12:49 PM	892153	Student Health Services	Department	Wimbler, Deontez	VOICE Peer Education Meeting	Student Group Meeting	Custodial Fee Due
10/19/2018 12:53 PM	893248	Eagles@GT	Student Group	Buehler, Joseph D	Sustainability Ment Badge Day	Workshop	Custodial Fee Due
10/23/2018 3:39 PM	894470	Alpha Phi Alpha	Student Group	Famor, Booker	Nu Mu Chapter Meeting	Meeting	Custodial Fee Due
10/24/2018 3:12 PM	894763	Mathematics	College of Sciences	Marzo, Lea T	Georgia Scientific Symposium (Kang)	Special Event	Custodial Fee Due
10/25/2018 10:43 AM	894896	Electrical & Computer Engineering	College of Engineering	Buford, Blake	Veritas Classical visit	Outreach Event	Tentative (approvals Requ
10/31/2018 3:58 PM	896609	ot-cio	Department	Book, Ruthie	ServiceNow Vulnerability Management Session	Workshop	Request Submitted - Web
10/31/2018 4:27 PM	896630	Biomedical Engineering Society	Student Group	Le, Jeanne	BMES Research Talk	Special Event	Request Submitted - Web
11/1/2018 9:39 AM	896739	Materials Science & Engineering	College of Engineering	Loosego, Mark D	MSE 3002 Review	Review Session	Request Submitted - Web
11/1/2018 12:42 PM	896807	Earth & Atmospheric Sciences	College of Sciences	Lawson, Natasha	EAS Seminar	Special Event	Request Submitted - Web
11/1/2018 12:55 PM	896811	Earth & Atmospheric Sciences	College of Sciences	Lawson, Natasha	EAS Seminar	Special Event	Request Submitted - Web
11/1/2018 1:00 PM	896814	Chemical and Biomolecular Engineering	College of Engineering	Ludovice, Peter J	CHBE2120 Review Session	Review Session	Request Submitted - Web
11/1/2018 2:37 PM	896848	Aerospace Engineering	College of Engineering	Hodges, Brittany	SEDA KSP Event	Workshop	Request Submitted - Web
11/1/2018 9:04 PM	896939	HackGT	Student Group	Morton, Elise	HackGT Meeting	Meeting	Request Submitted - Web
11/1/2018 10:07 PM	896952	Society of Asian Scientists and Engineers	Student Group	Akhtar, Manzano	SERC Planning Team General Meeting	Meeting	Request Submitted - Web
11/1/2018 11:31 PM	896960	Chinese Students and Scholars Association	Student Group	Xinyi Zhang	seu	Meeting	Request Submitted - Web

Available Notification Rules will appear in the left pane in the Dashboard. Select the appropriate rule. The current requests for that rule will appear in the right pane in the Dashboard.

Double click on the reservation you desire to process. The reservation detail will appear.

The screenshot shows the reservation detail view for 'HackGT Meeting' (Reservation No. 896939). The left pane shows a list of reservation requests, with 'HackGT Meeting' selected. The right pane shows a summary of the reservation, including the event name, group, 1st contact, phone, and reservation number. Below the summary is a table of reservation details.

Date	Start	End	Building	Room	Event	Event Type	Status
11/6/2018 Tue	8:00 PM	10:00 PM	Instructional Center (IC)-055-Open 7:30AM to 11PM	215 Classroom IC	HackGT Meeting	Meeting	Request Submitted - Web

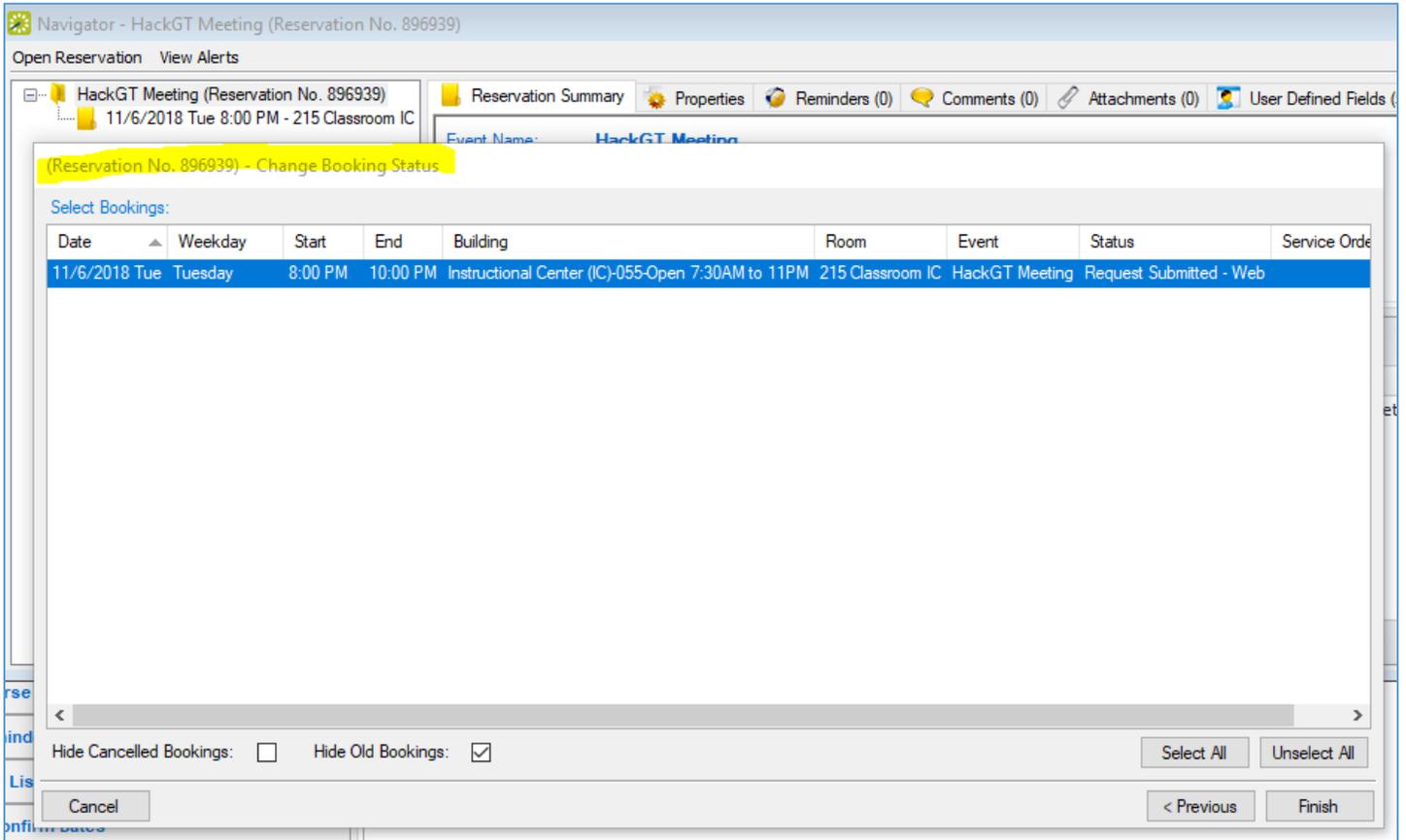
Once you have verified that the reservation request is appropriate for approval, make sure the Reservation level item is highlighted in the left pane and click the “Change Status” button to the right. This will bring up the Change Booking Status box.

The screenshot shows a web application window titled "Navigator - HackGT Meeting (Reservation No. 896939)". The main content area displays a "Change Booking Status" dialog box for reservation number 896939. The dialog box has a title bar that reads "(Reservation No. 896939) - Change Booking Status". Inside the dialog, there is a "Status:" dropdown menu currently set to "Confirmed". To the right of this dropdown, it says "Current Reservation Status: Request Submitted - Web". Below the status field, there is a "Reconfirm Date:" field with a calendar icon. Further down, there are two checkboxes: "Update Reservation Status:" which is checked, and "Send Confirmation If Successful:" which is also checked. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Next >" on the right. The background of the application window shows a navigation pane on the left with a tree view containing "HackGT Meeting (Reservation No. 896939)" and "11/6/2018 Tue 8:00 PM - 215 Classroom IC". The top navigation bar includes "Open Reservation", "View Alerts", and several tabs: "Reservation Summary", "Properties", "Reminders (0)", "Comments (0)", "Attachments (0)", and "User Defined Fields (5)".

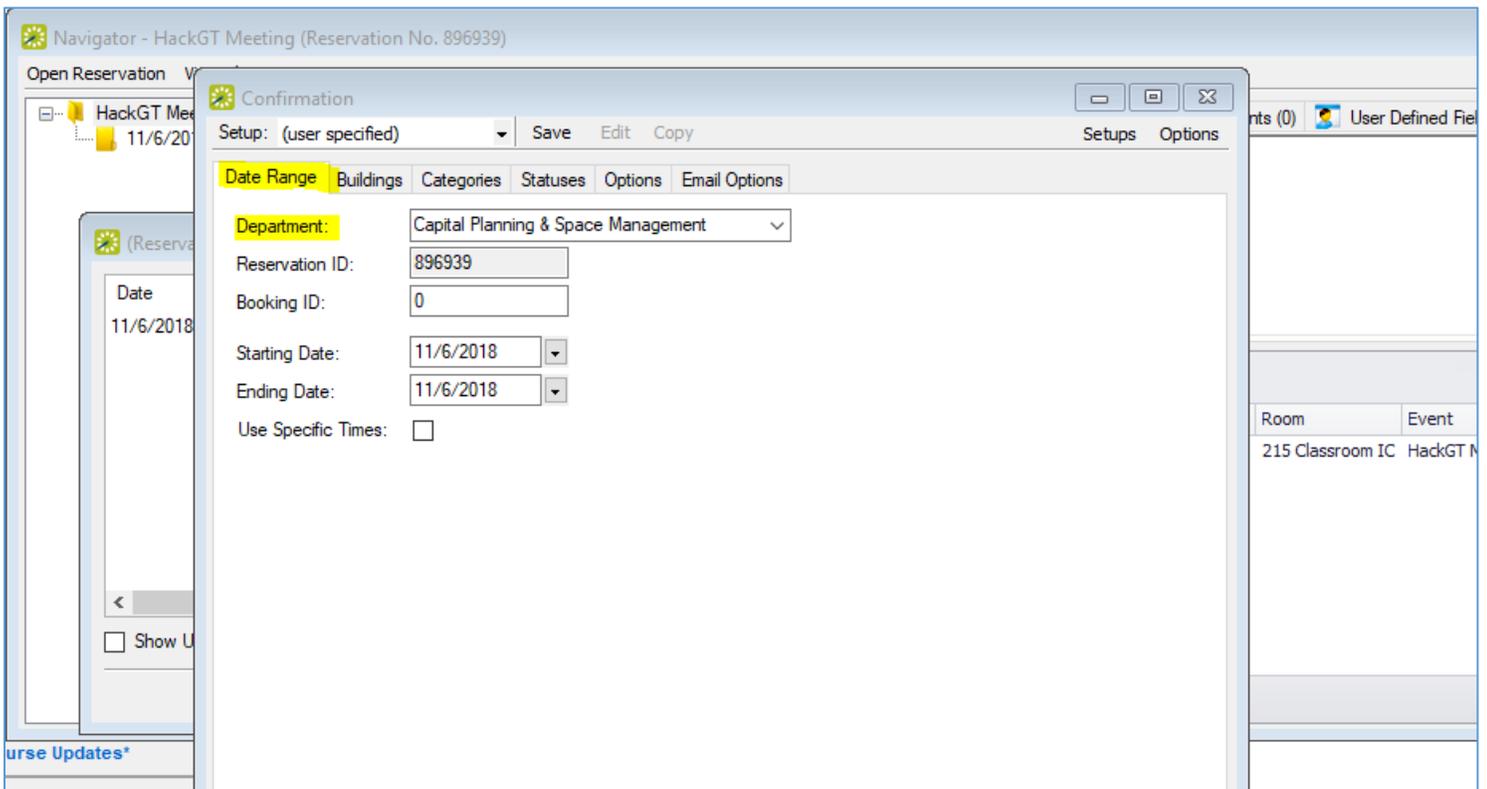
Select the desired status. Make sure the “Update Reservation Status:” and “Send Confirmation If Successful:” boxes are checked. Click “Next”.

This screenshot is identical to the one above, showing the "Change Booking Status" dialog box for reservation number 896939. The status is set to "Confirmed", and both the "Update Reservation Status:" and "Send Confirmation If Successful:" checkboxes are checked. The "Next >" button is visible at the bottom right of the dialog.

The Change Booking Status box will appear listing all bookings for the reservation. If there are multiple bookings, you are able to manipulate the status of each booking separately. All bookings will be selected by default. By clicking “Finish” this will change the status of all bookings and reservation to the status you selected on the previous screen.

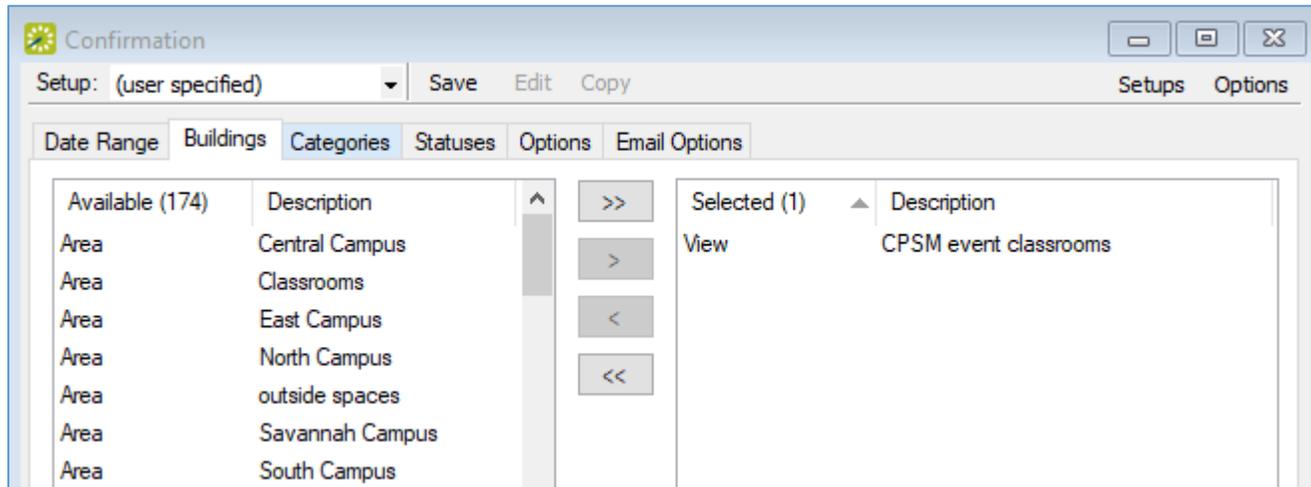


After clicking “Finish” the Confirmation box will appear. This starts the process of sending a notification email to the person requesting the space. Make sure your department is selected in the “Department:” box on the Date Range tab.

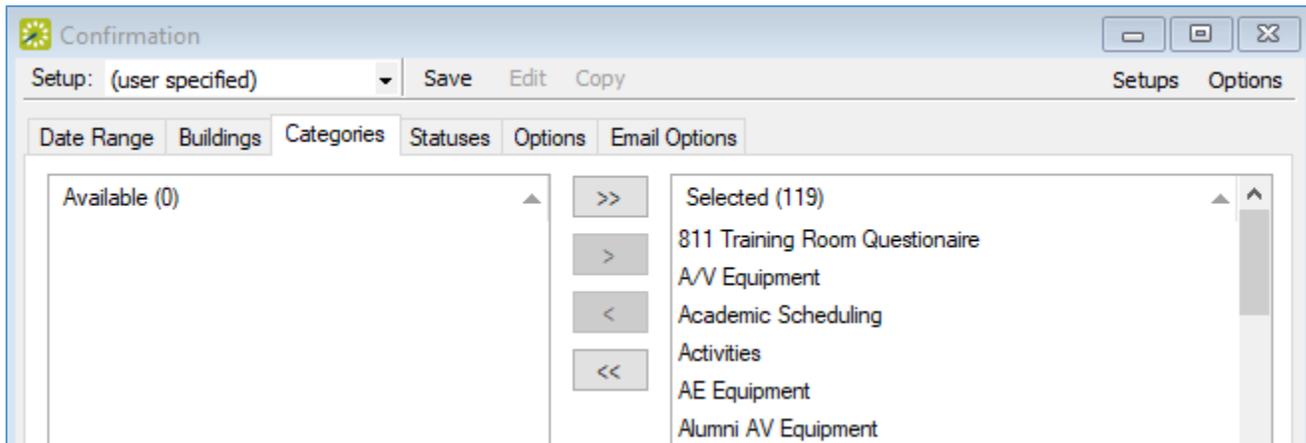


The following parameters will need to be set on the first confirmation and will be remembered going forward. Multiple “Setup:” configurations can be created with different parameters if desired.

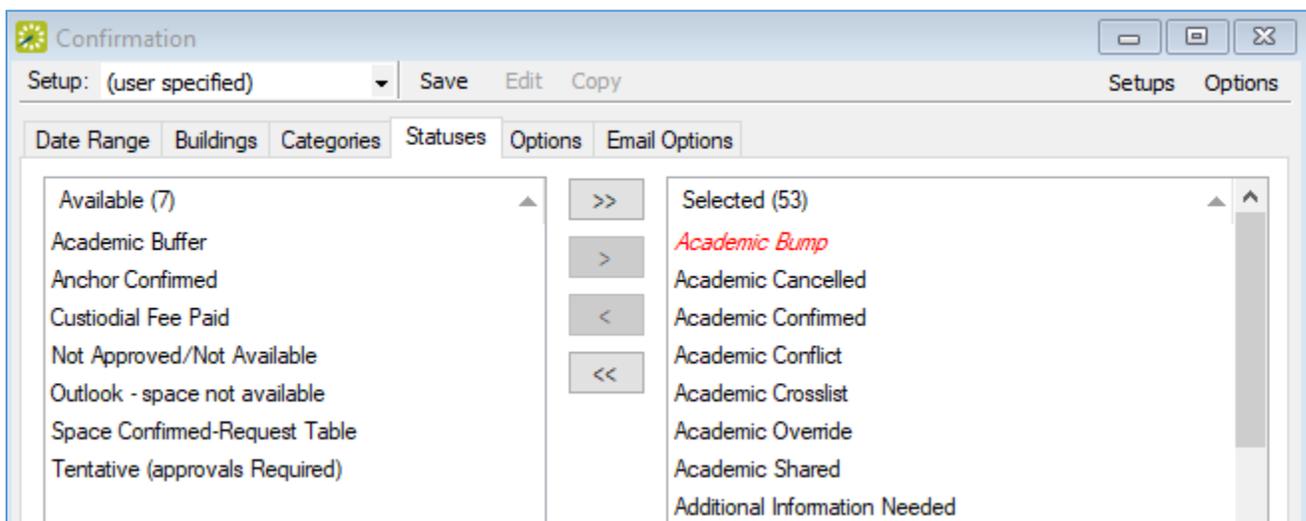
On the Buildings tab, move the desired buildings over to the “Selected” column.



On the Categories tab, move the desired Categories over to the “Selected” column. This will give you the option of including Category information on the Confirmation.



On the Statuses tab, move the required Statuses over to the “Selected” column. All status that you want to send Confirmation for need to be in the “Selected” column.



On the Options tab, the following parameters are set to be included or excluded from the Confirmation.

Confirmation Title

Header and Footer Messages with standard verbiage

Comments, User Defined Fields, Room Notes, Category Subtotals

Display Message as HTML

The screenshot shows the 'Confirmation' window with the 'Options' tab selected. The window title is 'Confirmation' and it has a menu bar with 'Setup: (user specified)', 'Save', 'Edit', and 'Copy'. Below the menu bar are tabs for 'Date Range', 'Buildings', 'Categories', 'Statuses', 'Options', and 'Email Options'. The 'Options' tab is active, showing the following settings:

- Confirmation Title: Your request has been processed
- Header Message: cpsm greeting with custodial fees Header
- Footer Message: CPSM greeting with custodial fees Footer
- Paper Size: Letter
- Print Comments:
- Print Reminders: Suppress Reserved Time:
- Print Cancel Reasons: Suppress Location:
- Print User Defined Fields: Suppress Pricing:
- Print Room Phone: Suppress Logo:
- Print Room Notes: Suppress Item Notes:
- Print Building Notes: Suppress Item Special Instructions:
- Print Category Subtotals: Suppress Item Selections:
- Print Room Type: Always Display Time Zone:
- Print Item Selection Notes: Display Messages As HTML:
- Limit Bookings To Those With Details In Selected Categories:

On the Email Options tab, the "Email Format:", "Email To:", and "Email CC:" are configured.

The screenshot shows the 'Confirmation' window with the 'Email Options' tab selected. The window title is 'Confirmation' and it has a menu bar with 'Setup: (user specified)', 'Save', 'Edit', and 'Copy'. Below the menu bar are tabs for 'Date Range', 'Buildings', 'Categories', 'Statuses', 'Options', and 'Email Options'. The 'Email Options' tab is active, showing the following settings:

- Header Message: (none)
- Footer Message: (none)
- Email Format: Detail
- Attach Detailed Confirmation:
- Add Res. ID to File Name:
- Attach .ics File:
- Prompt For Res. Attachments:
- Email To: 1st Contact 2nd Contact (G... Group Everyday User
- Email CC: 1st Contact 2nd Contact (G... Group Everyday User

Once the desired options are selected on each tab of the Confirmation box, they will be remembered for future confirmations. You may also create multiple settings by using the “Setup” option at the top.

You are now ready to send the Confirmation email to the requester. Click on “Email” at the bottom of the Confirmation box.

The screenshot shows a software window titled "Confirmation" with a menu bar containing "Setup: (user specified)", "Save", "Edit", and "Copy". On the right side of the menu bar are "Setups" and "Options" buttons. Below the menu bar are several tabs: "Date Range", "Buildings", "Categories", "Statuses", "Options", and "Email Options". The "Email Options" tab is active and contains the following settings:

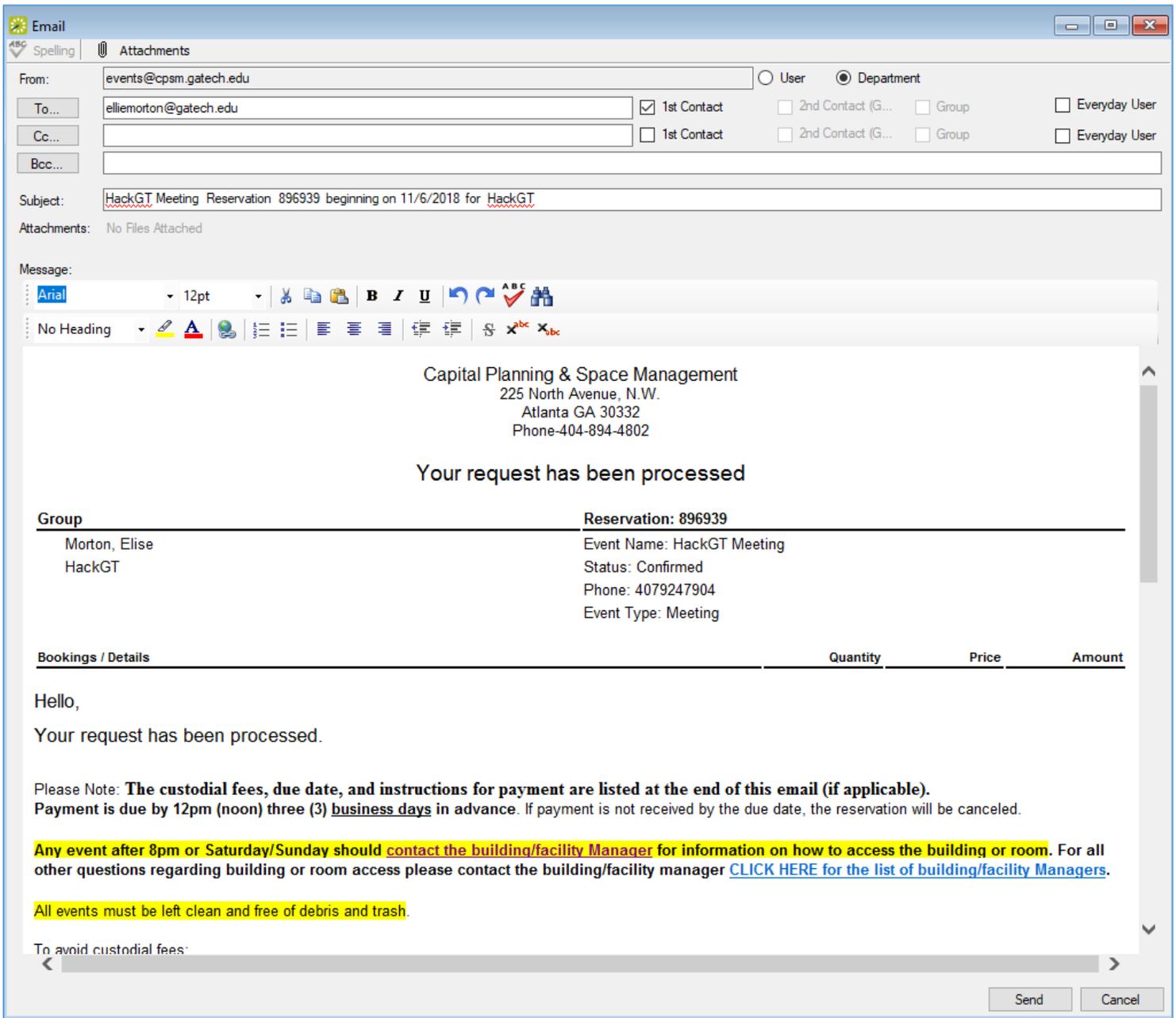
- Header Message: (none) (dropdown)
- Footer Message: (none) (dropdown)
- Email Format: Detail (dropdown)
- Attach Detailed Confirmation:
- Add Res. ID to File Name:
- Attach .ics File:
- Prompt For Res. Attachments:
- Email To: 1st Contact, 2nd Contact (G...), Group, Everyday User
- Email CC: 1st Contact, 2nd Contact (G...), Group, Everyday User

At the bottom of the window, there is a "Close" button, a highlighted "Email" button, a "Copies To Print:" field with the value "1", and "Print" and "Print Preview" buttons.

This will bring up the Email box displaying the Confirmation Email as it will look based on the parameters selected on all the tabs in the Confirmation box. If you need to make changes to any parameters at this point, click “Cancel” at the bottom of the Email box. You will be returned to the Confirmation box and can make additional change.

You may also make any changes directly in the Email box by typing in additional recipients in the To: Cc: or Bcc: boxes. Additional verbiage or changes to verbiage can be done directly in the Message: box. Note that any change made using this message will not be remembered for future Confirmation emails.

See next page for example of a Confirmation Email.



Once you are ready to send the Confirmation email, click “Send” at the bottom. You will be returned to the Confirmation box. Simply close all open boxes to return to the Dashboard to continue process additional reservation requests.

Once on the Dashboard again, click “Refresh”. This will update the notification rules with any changes. In this case, the reservation that was just processed with change from a status of “Request Submitted – Web” to Confirmed. Reservations that have been processed can be removed from the list by highlighting the reservation and clicking the “Reviewed” button on the right. This will move the processed reservation to the “Reviewed” list. Use the “Show” option on the right to select which list to display.

