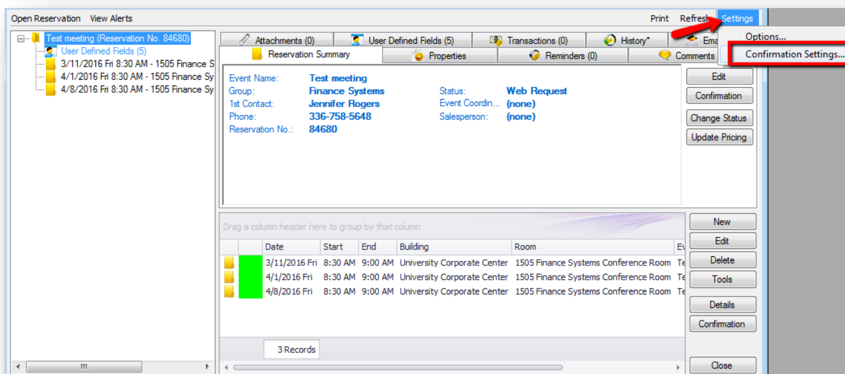
WAKE FOREST UNIVERSITY

Specifying Confirmation Settings & Memorizing Confirmation Reports

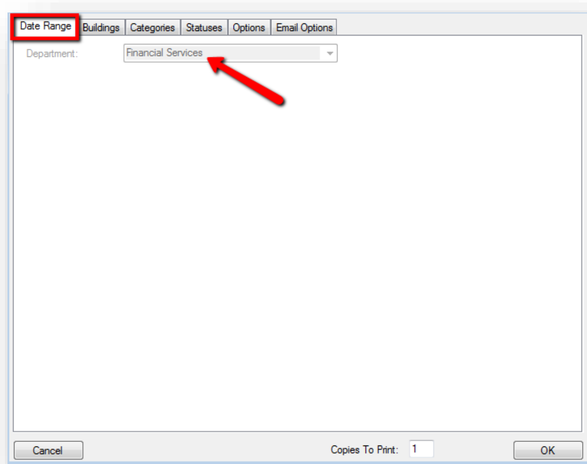
To personalize your confirmation settings:

These steps will walk you through the process of setting your email communication options up in the confirmation screens for use over and over.

In EMS, search for and select any event to open the Navigator view. In the upper right-hand corner, click Settings > Confirmation Settings.



The confirmation settings dialog box displays. On each tab of the confirmation settings dialog box, select the specific options that will display for you each time you click the Confirmation button in the Navigator window to send an email to a requestor. On the date range tab, make sure that your department is displaying in the drop-down.



<table>
<tr>
<td>On the Buildings tab, select the building(s) for the rooms that you manage. Highlight them in the Available Buildings list on the left and click the > to move them to the Selected Buildings list on the right. To select multiple buildings, hold the Ctrl button down as you click.</td>
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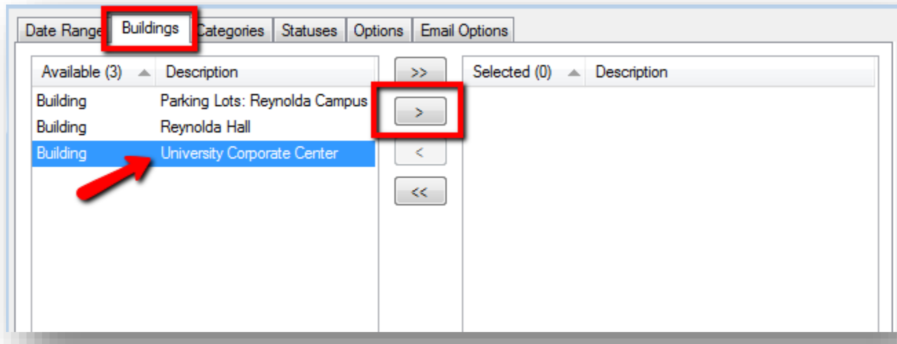

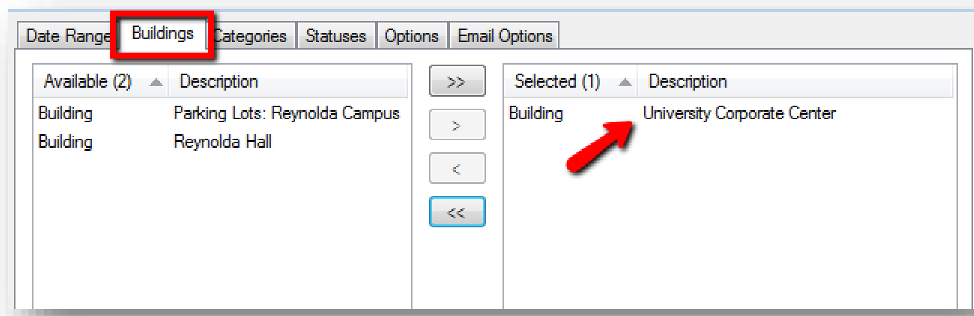

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<td>If there are specific booking details that should be included on the confirmation, select them from the Categories tab. If not, skip this tab.</td>
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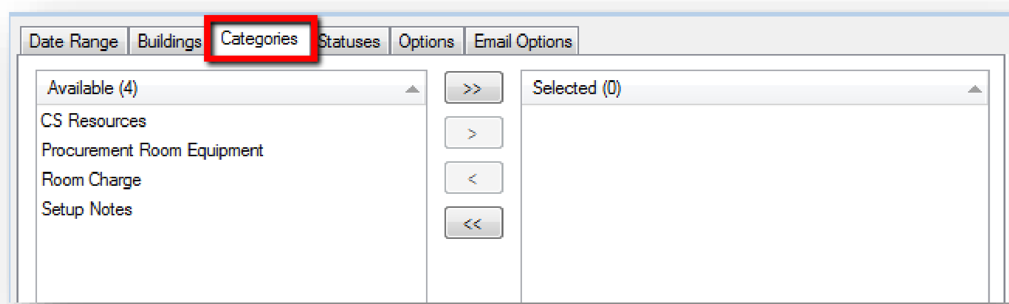

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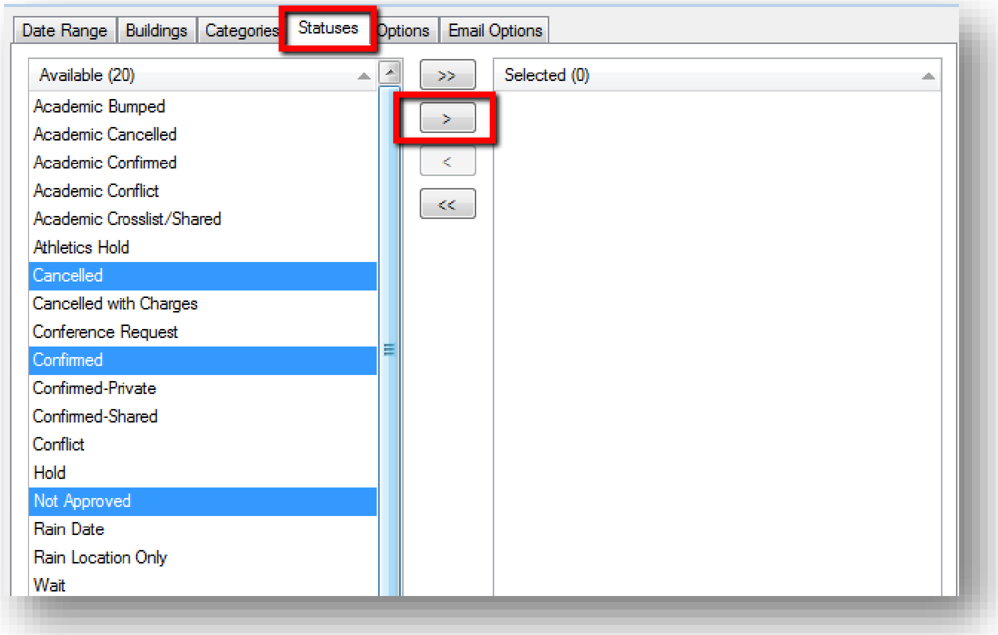
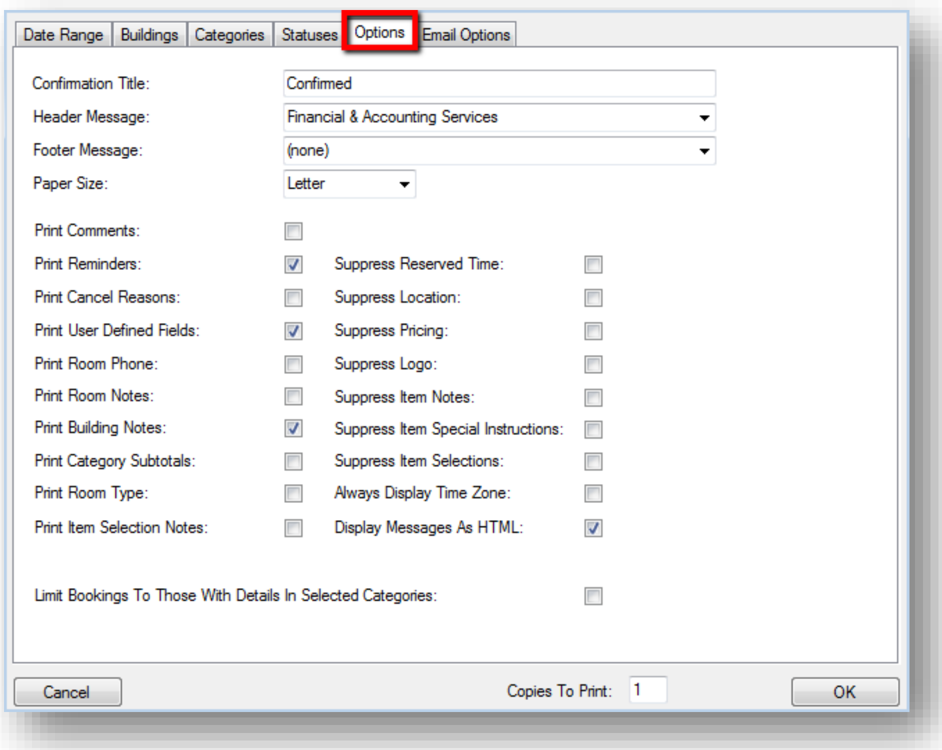
On the Statuses tab, select any statuses that you frequently use in your email communications to be included in the Selected Categories on the right.



The Options tab is where you will format settings for the printed communication that is sent to the requestor.

In the Confirmation Title field, type a title for the type of communication you will send most frequently.

If your area has a pre-configured Header and/or Footer message, select it from the drop-down menus. Additionally, check the boxes beside any options that you want to be sure print or do not print on the email response. For a complete listing of each of the options to print or suppress, see the last page of this guide.



The Email Options tab offers choices to format the settings of the body of an email response.

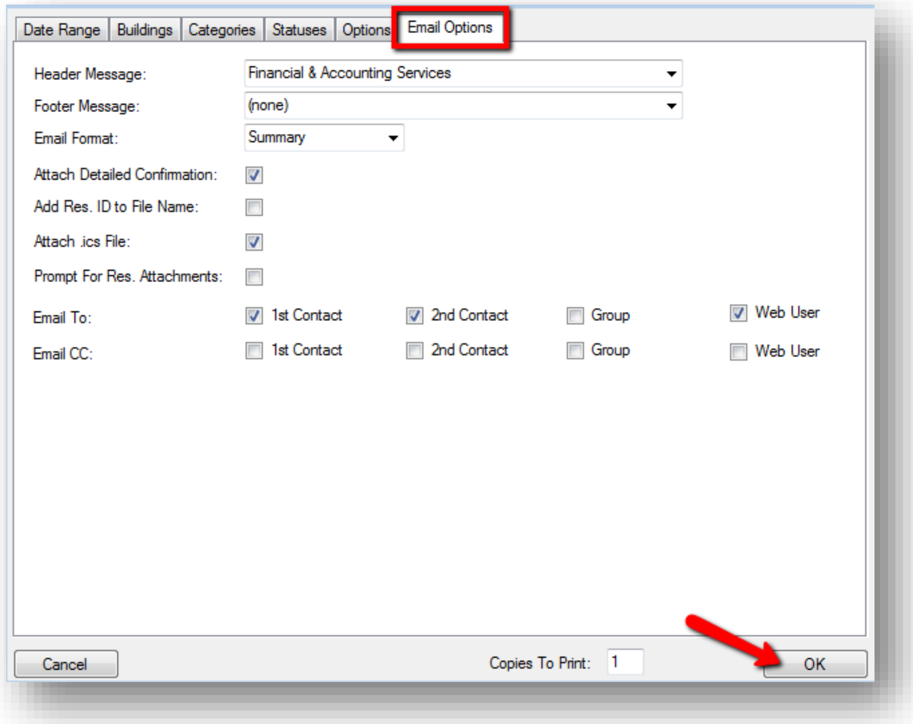
Select any necessary Header & Footer messages from the drop-down menus.

Select the appropriate email format from the drop-down. None opens a blank email form. Detail displays the confirmation in its entirety in the email body. Mobile Friendly provides a condensed version viewable on a mobile device. Finally Summary provides only the booking information in the email body.

Selecting Attach Detailed Confirmation provides the entire confirmation as an email attachment.

Attach .ics File provides a file that a recipient can save to create an entry on their calendar.

Select the appropriate users associated with the reservation who should receive the email response.

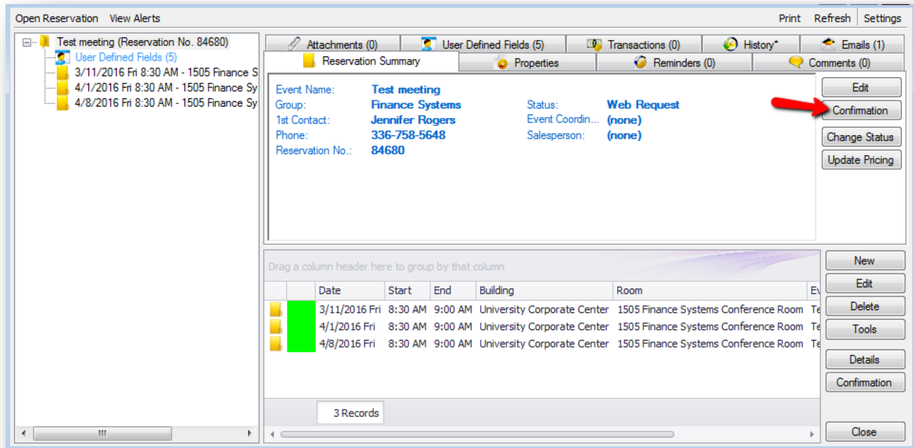


Once all settings have been selected, click 'OK' in the bottom right corner of the dialog box to save your settings and return to the Navigator window. Once configured, these settings will display each time you click the Confirmation button on any Reservation.

To memorize a confirmation report setup:

After configuring your personal confirmation settings, you can also save specific confirmation report setups to save even more time when responding to space requests.

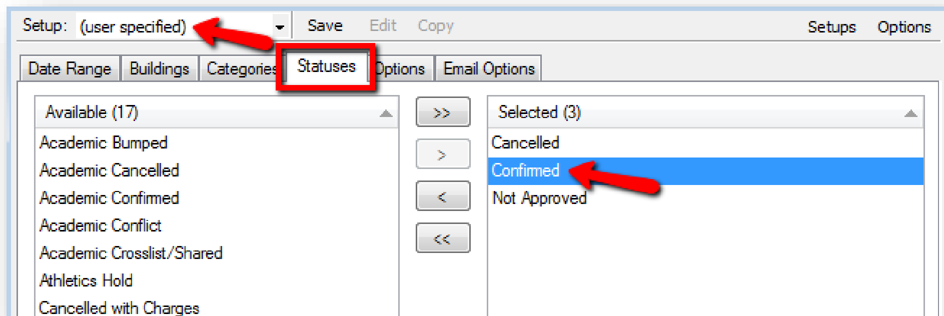
Starting from the Navigator window for a reservation, click ‘Confirmation’ in the upper pane.

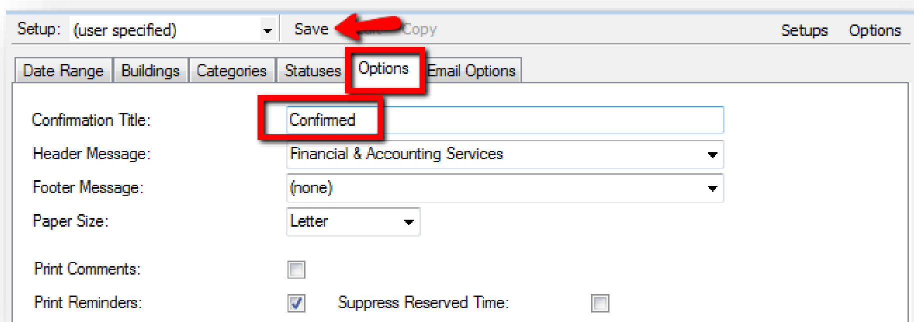


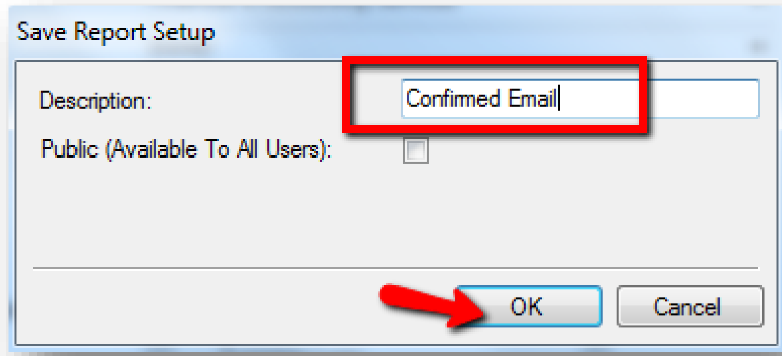
We’ll begin by creating and saving a confirmed status report. Make sure that the drop-down to the right of the word Setup at the top of the screen says ‘user specified’.

On the Status tab, be sure ‘Confirmed’ is the highlighted status in the Selected Statuses column. On the Options tab, be sure the Confirmation title reads ‘Confirmed’.

Once the information on these tabs is updated, click ‘Save’ at the top of the dialog box.





<table>
<tr><td>A Saved Report Setups dialog box will display. In the description field, give your setup a name, such as Confirmed Email and click ‘OK’. Note that if you check the box to make your setup public, all space managers will see it when they click the Setup drop-down.</td><td>
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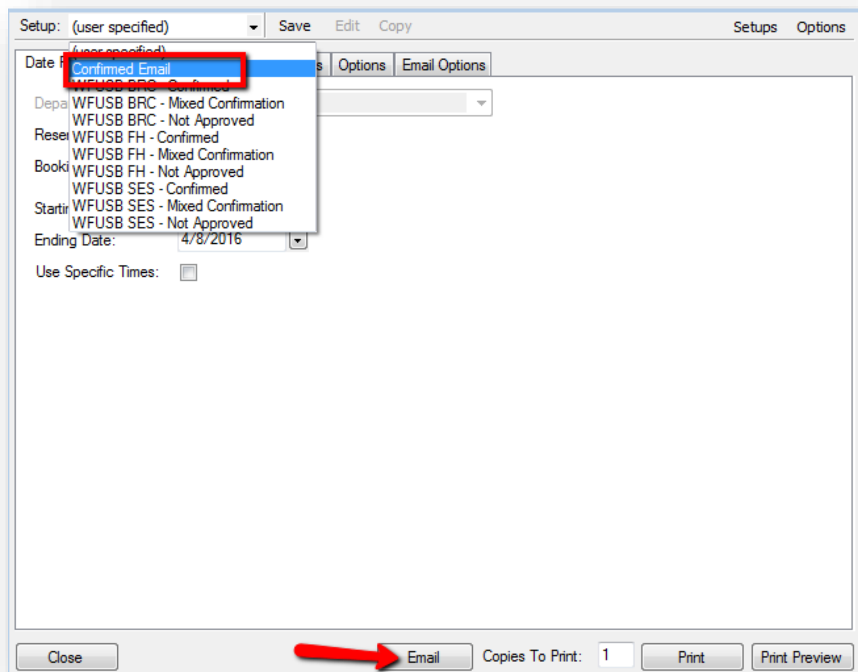
<tr><td>You will be returned to the Confirmation dialog box, and the Setup drop down should now display the title of the saved report you just created.

Once your setup is saved, each time you want to send an email response to let a requestor know that their reservation is confirmed, simply click ‘Confirmation’ from the Navigator window. When the dialog box displays, select ‘Confirmed Email’ from the Setup drop-down and click ‘Email’ at the bottom of the screen to preview the email and send.</td><td>
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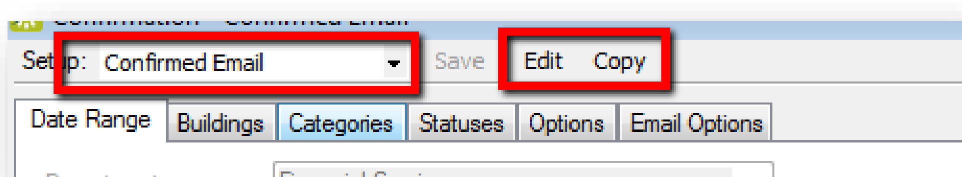
<tr><td>Once you have saved a setup, you can make changes to the selected options by choosing the appropriate setup from the Setup drop-down and clicking ‘Edit’. You can also copy your setup to create a new one.</td><td>
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<tr>
<td>To create a new setup using a setup you've already saved, select your saved setup from the drop-down, and click 'Edit'. Notice that once you click 'Edit', that button will be grayed out. Make any necessary changes to the selected options on the tabs for your new setup.</td>
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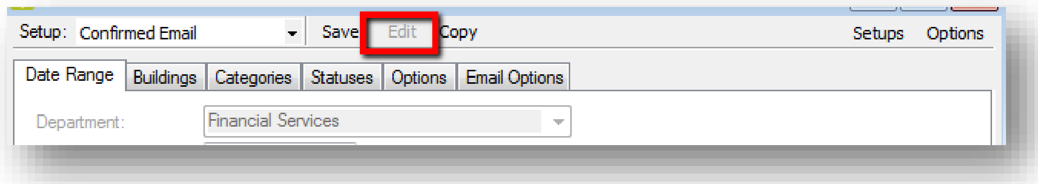

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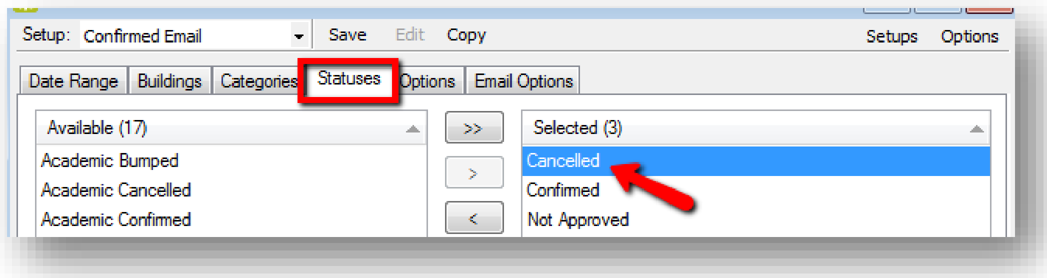
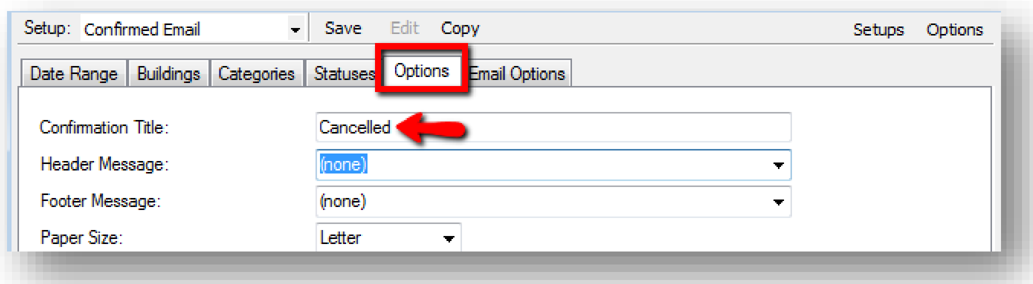
<td>For example, to create a "Cancelled Email" setup, after clicking 'Edit', change the highlighted status on the Statuses tab to 'Cancelled', and change the Confirmation Title on the Options tab to Cancelled.</td>
<td>




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<td>Once the necessary changes are made, click 'Copy'. The description dialog box will display with the title 'Copy of _______'. Change the Setup description, this case, to read 'Cancelled Email' and click 'OK'.</td>
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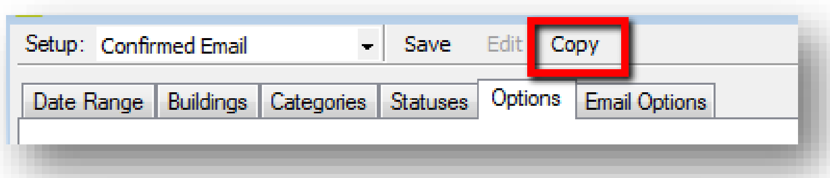

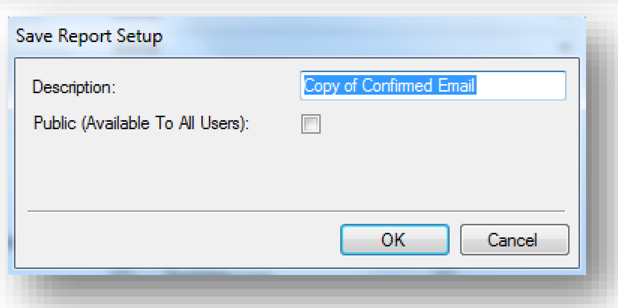

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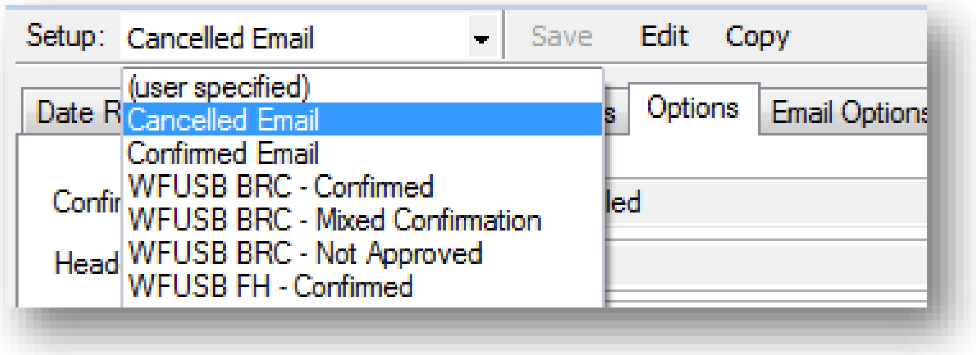
The dialog box will close and you'll be returned to the Confirmation dialog box. You'll see that you have an additional setup in the drop-down now that you can use each time you need to send a cancellation response. Repeat this process each time you need a new setup.

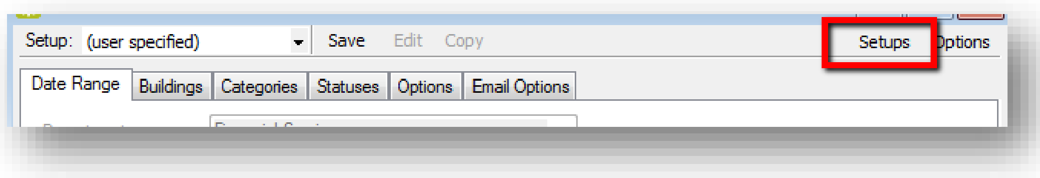


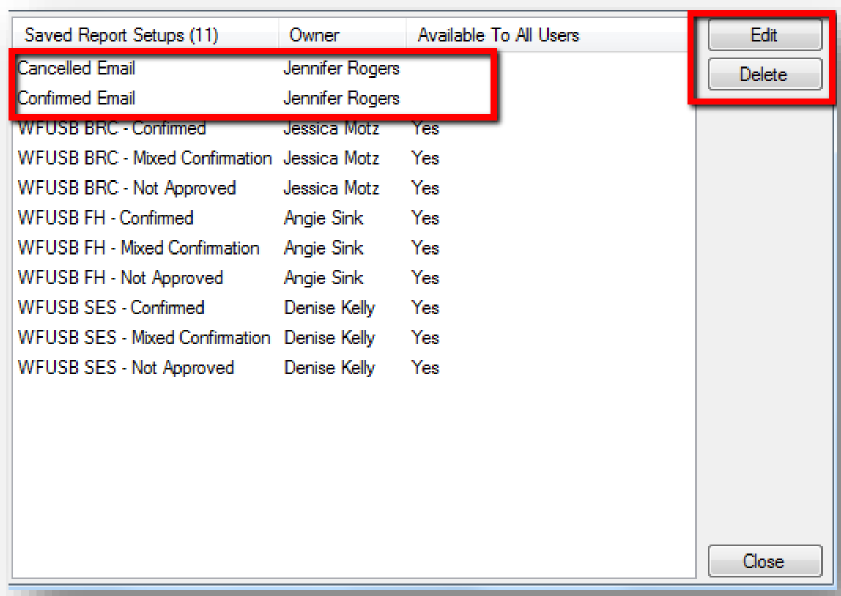
To manage your setups, click 'Setups' at the top of the Confirmation dialog box. A dialog box will display, listing all of your Saved Report Setups. Highlight the row that you would like to edit or delete.

Clicking the Edit button allows you to change the description (title) and make it available to other users, if desired.

If you click the Delete button, the system will ask you if you're sure you want to delete. Click 'OK' to delete and Cancel if you do not want to delete.

Note: If you see setups listed in this view that have been shared with others that you did not create, do not edit or delete them.





Option	Description of Options for the Printed Communication
Print Comments	Include the comments for the reservation.
Print Reminders	Include the reminders for the reservation.
Print Cancel Reasons	Include the reasons for the cancellation.
Print User Defined Fields	Include user defined fields and their values.
Print Room Phone	Include the phone number for the room in which the event is being held.
Print Room Notes	Include any notes for the room in which the event is being held.
Print Building Notes	Include any notes about the building.
Print Category Subtotals	Include the subtotal charges by category.
Print Room Type	Include the room type for the event.
Print Item Selection Notes	Include the notes for each resource selection item for the event.
Print Internal Budget Code Allocation	Include the budget code for the event as well as the percentage of charges allocated to each code.
Print PO Number Allocation	Include the PO numbers for the event as well as the percentage of charges allocated to each number.
Suppress Reserved Time	Do not show the reserved time for the event.
Suppress Location	Do not show the location for the reservation.
Suppress Pricing	Do not show the reservation's room charges or resource charges.
Suppress Logo	Do not show the organization's logo.
Suppress Item Notes	Do not show notes for any booking items.
Suppress Item Special Instructions	Do not show special instructions for any booking items.
Suppress Item Selections	Do not show any resources items selections.
Always Display Time Zone	Always show the time zone for the event.
Display Messages as HTML	If HTML messages have been defined, select this option to display the HTML version. Otherwise, the message is displayed in plain text.
Limit Bookings to those with Details in Selected Categories	Show only those bookings that contain details for the categories selected on the Categories tab.