UNH EMS Desktop Client

Managing Services

SUPPORT

Do not contact EMS Software Support Services.

If you need more information or support, please submit a service request here.

WHAT IS A "SERVICE"

An "event service provider" provides services that support events on campus, but to not manage any space. (i.e. Parking)

DEFINITIONS for structure

- **Reservation:** A reservation is the "parent" of any event in the system and may contain one or more bookings. Each reservation is assigned a unique number.
- **Booking:** A booking is a subset of a reservation. If there are multiple rooms related to an event, or if the event has multiple dates, then each different room/date will be a different "booking" under the parent "reservation". Each booking is assigned a unique number.
- **Category:** A category is a breakout of the services or equipment that a user can request. For example, "Transportation", "Catering", "MUB Equipment" are all categories. Categories can also be notes fields. So there is a category called "Event Notes" which can be used for special explanations. Categories are assigned under bookings.
    - Category w/service is a type of category that has a specific time applied to it. That time may or may not be the same as the event time.
    - Category with no service is a type of category that has not specific time and it would be assumed that any resources assigned would have the same use time as the event.
- **Resources:** Resources are individual items that live within a category. Examples of resources would include a parking space, a microphone, a shuttle bus, an usher.
- **Group:** A group is the department or organization responsible for the event—the customer.
- **Contact:** A contact is the individual person connected to the group that is responsible for the event.
- **Web User:** A web user is someone who submits the online request for space or services. The web user may or may not be the same as a contact on a reservation.

DEFINITIONS for workflow

Manage Services: The screen view that allows service providers to view and manage requests for the service they provide.

Navigator: This is the view of a reservation with all of the bookings, dates, spaces, times, categories and resources visible. This is where you can get the “big picture”.

Status: Status is applied to an entire reservation as well as to individual bookings. In reality, the status field indicates where in the workflow that actual room reservations are. The status of the reservation or booking is controlled by the space owner. Bookings and reservations usually have the same status, but they can be different.

Event Time: Is applied to a booking and is the actual advertised event start time.

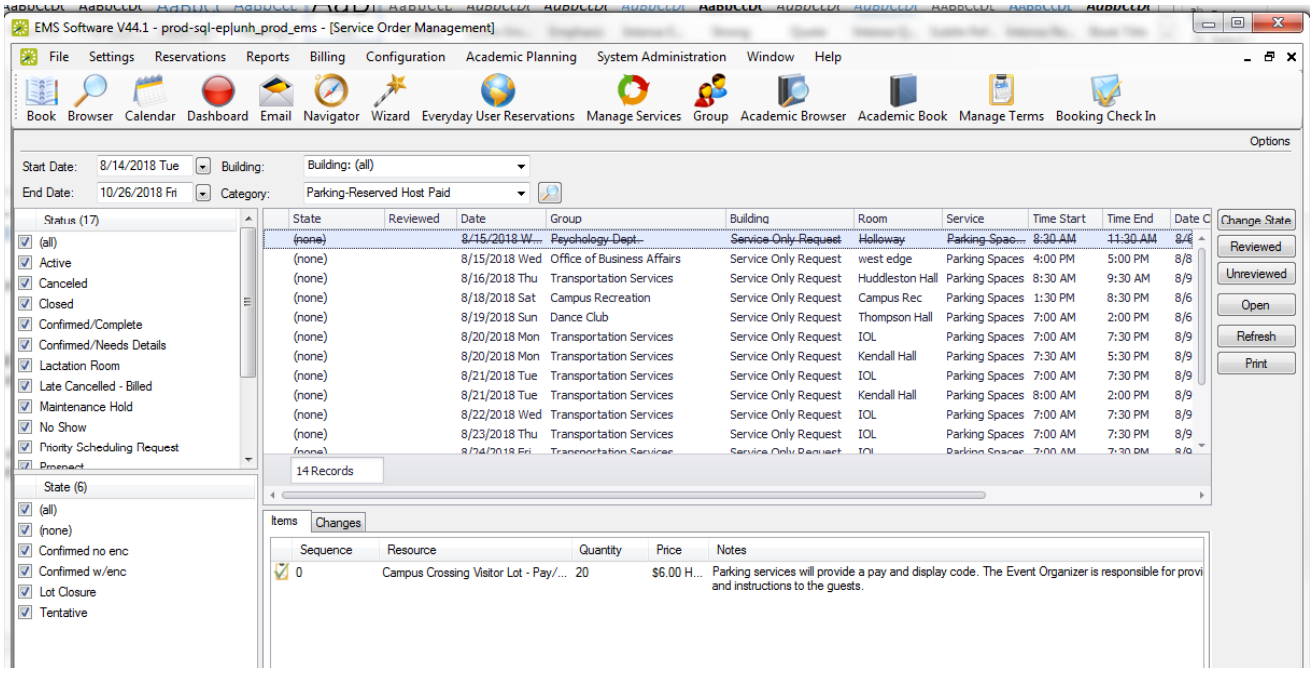
Reservation Time: Is applied to a booking and includes any set up and breakdown time before and after the event time.

Service Time: Service time is applied to a category and represents the time that a service is requested for. Parking, for example, will have a service time that is longer than the event time to account for guests coming before and leaving after the event. Catering may have several service times over the course of an event to accommodate, for example, a breakfast, coffee break and lunch.

State: A state is applied to a requested service. It is similar to status, but is specific to each service request. So a reservation or booking may have a status of “Confirmed” while the service within the reservation or booking may be in a state of “tentative” meaning that the details are not all ironed out. Each service provider is responsible for the state of the resource/category they manage.

OPERATION FLOW

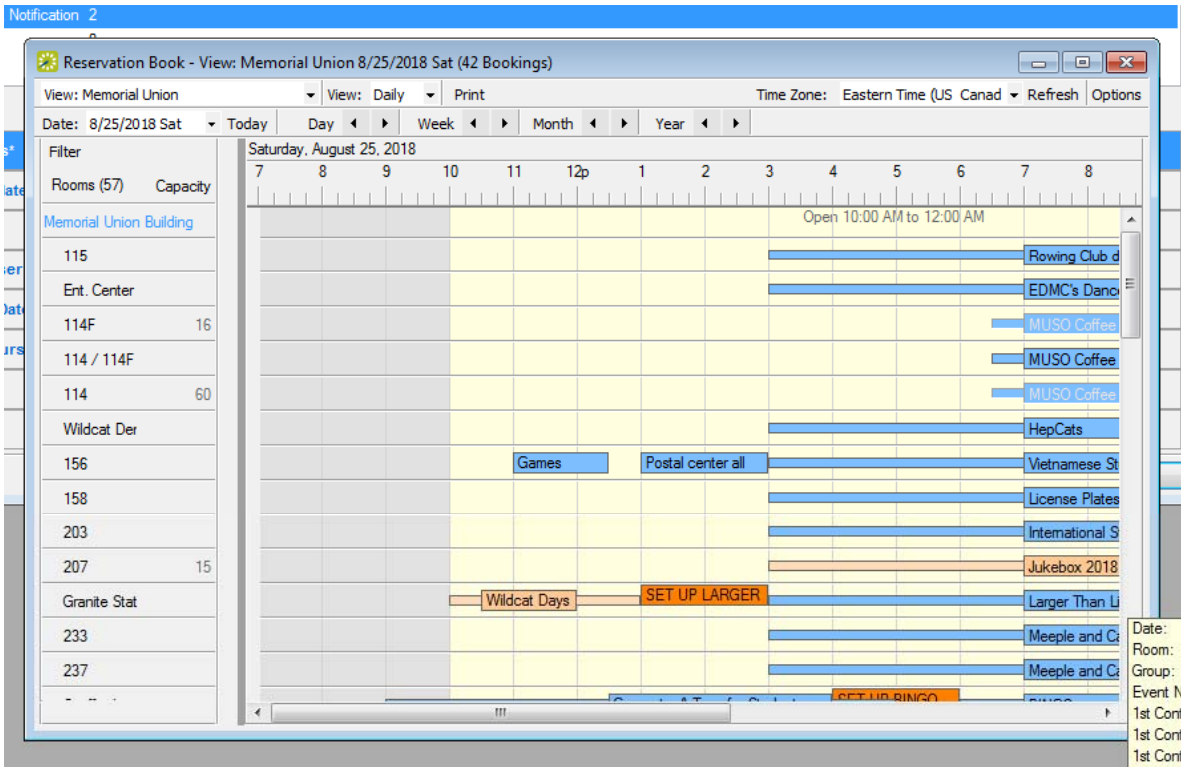
- Open “Manage Services” to view current or upcoming requests for service. Use the filters on the top and left to define what you are looking at.



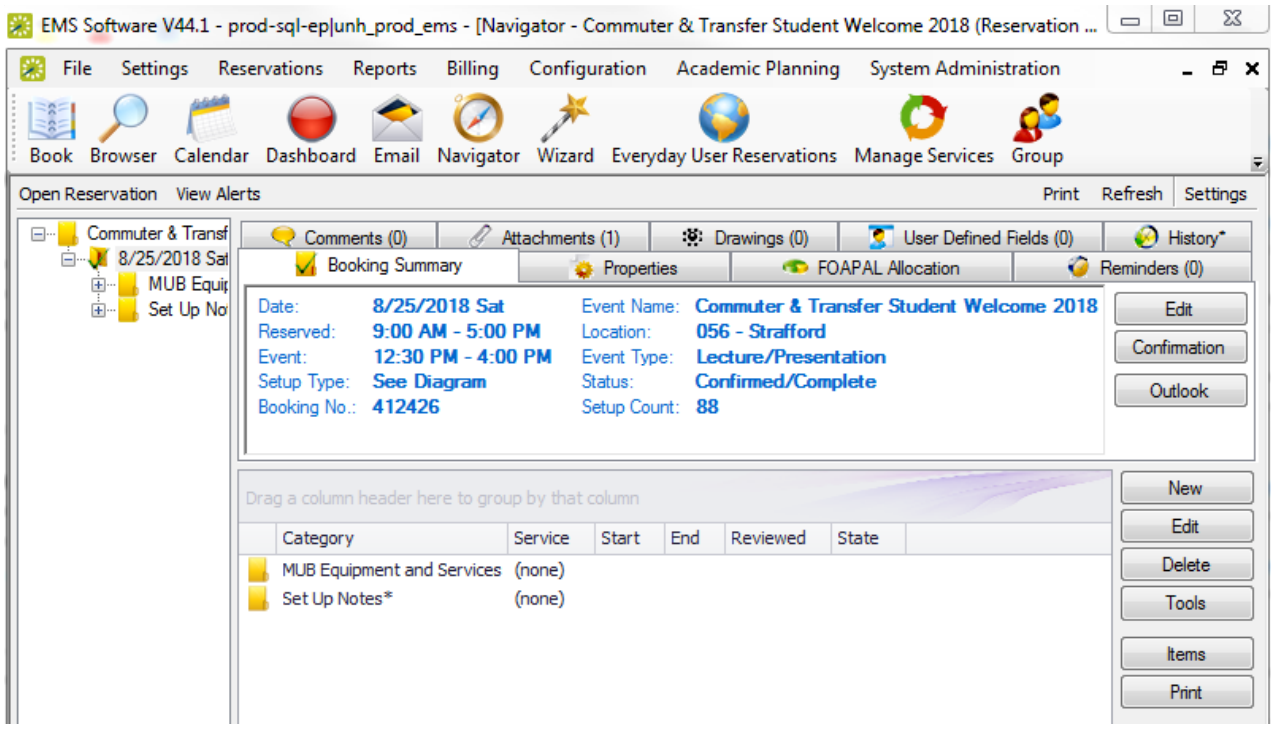
- Look at Building. If the building is “service only request” it means that the request is independent of a room reservation. Otherwise if the Building lists an actual building, you can highlight that service, click “open” on the right and view the entire reservation and bookings in the Navigator view to get “the big picture”.
- Status: If the service request is attached to a room reservation, you want to look at the reservation status. You never want to confirm a service if the actual event room has not been confirmed.
- Use the “+” sign to open bookings and categories.
- Review the request for services that has been submitted. You can decide if you need to make changes, ask questions or approve as is. You want to update the “state” in the Manage Services view to keep track of where in your workflow the request is.
- Once your information is complete and correct, send the client a “confirmation” by clicking on “confirmation” from the navigator view.
    - Follow the prompts to define what the confirmation should show. The first time you do this, you can click “save” and give the group of settings a name so that you can use it again without having to make all of the selections.
    - Click “preview” to see what you are about to send the client. Check content and pricing.
    - Click “email” to launch outlook with an email addressed to the contact.

CREATE A NEW SERVICE ORDER

- If an order does not come as an online request, you need to create it “from scratch”.
    - If the request indicates it is for an event in a room that is currently being managed in this scheduling system, use the book view to navigate to the building and date to locate that event. (You can also search for event using the Browser.)



- From the Navigator view:
    - Double click on the reservation.
    - Highlight the appropriate booking on the left.
    - Click “new” in the lower left to select the category for which to are adding a service.
    - Add the resource from the category with the appropriate service time and state.
- From this point forward, you can refer back to “Operation Flow” to manage this request.



- If the request is related to an event taking place in a location not currently managed in this scheduling system, click “Wizard” at the top of the page.
    - Select the date and time. This can be the same as the service time you will enter later. Use the building “Service only Request” and the room “Service only Request”. Under “location” enter the building and/or room the event is taking place in.
    - Make the status “confirmed/complete”. And click “next”.
    - Complete the information about the event itself and the group and contact making the request. Set up type can be “default” and Set up Count “1”.
    - Click Finish.
    - From this point forward, you can refer back to “Operation Flow” to add the requested services/resources and manage this request.

REPORTS

To communicate and manage workflow in a department, you can print or distribute reports by email.

Reports > Daily > **Service Order Schedule**

This is a common report that can be run with your choice of parameters over any time period. This is generally very useful in providing staff an overview of what is happening.

Reports > Daily > **Service Order**

This is a common report that is usually used to print the specifications for one event. It is generally used by the staff people responsible for providing the services. For example, it might be given to the driver responsible for the shuttle, or the staff person assigned as a parking lot attendance.

BILLING

The billing process includes creating an invoice for all or part of a reservation/booking/category. And then posting one or more transactions for payment of that invoice.

Billing Worksheet

- If you only periodically run invoices—for example once a week—start by running the Billing Worksheet Report. Billing > Invoices > **Billing Worksheet.**
- This will allow you to bring up orders that are completed, but have not been billed.

Invoicing:

- You can initiate an invoice from within the Navigator view of a reservation, or by going to: Billing > Invoicing. Set your parameters, click “generate”, highlight the item, click “preview”, if correct, click “finalize” and once finalized you can email it to the contact. A completed invoice is considered a transaction.

Payments:

- All invoices ultimately need to have payments attached to them.
  Go to Billing > Payments > **Payment Entry.** The payments you enter are considered transactions.
- Click “new”. Complete the form with the correct details. “Reference #” would be the ENC., PO, Check, Journal Transfer number—whatever identifying item you have related to how you are taking in the payment.
- You can post partial payments if, for example, a client is making a down payment/deposit.