

Shared Order 1.0 User Guide

For RC 4.1

Document Revision 02

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CHAPTER 1. Introduction

Background

The background for this solution, was a request to be able to book several resources, across locations, and sending only 1 order to a Service Provider. This Service Provider is not linked to any specific RC location. In the standard RC solution, an order is created for each resource and the Service Provider is attached to the same location as the resource.

The first use case was booking of Video Conferencing in an international organization where 1 organizer books rooms in different countries and all the conferences are set up by regional service desks.

Overview

Shared Order 1.0 is a feature of the Resource Central system, which allows organizers to book multiple resources which have the same order form assigned. This order form is labeled "**Shared Order Form**" (SOF).

The content of the SOF describe a shared activity for the booked resources. As an example the resources can be equipped with Video Tele-Conferencing (VTC) technology. The shared activity is then a video conference involving the booked resources.

The booking is handled by a Service Provider and the information flow between organizer and the Service Provider is controlled by the content of the SOF.

Typical Work-flow:

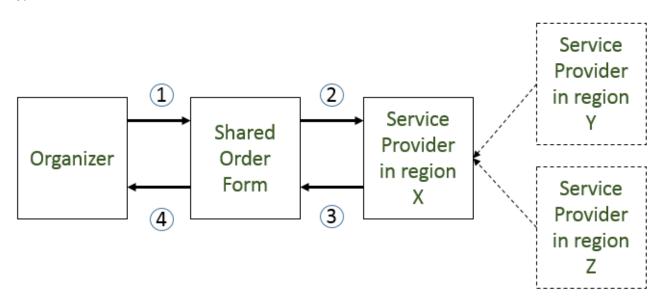


Figure 1. Work-flow

- 1) An organizer books resources with the same shared order form
- 2) The booking is sent to a Service Provider who is responsible for such orders
- 3) One of the Service Providers picks up the order
- 4) This Service Provider either confirms or declines the request and the result is sent as an email back to the organizer and he has to react properly (keep, modify or delete booking) according to standard Resource Central behavior.



NOTE: In order to make this guide as operational as possible the content is arranged around an example where it is assumed that the booked resources are all equipped with Video Tele-Conference technology (VTC) and the booking is to book the resources for a shared activity.

Shared Order Form

A Shared Order Form is the essential factor. It provides organizers with ability to book a number of resources (in various locations) in one booking and get only ONE order form.

The SOF is controlled by a parameter named **EnableSOF**. For more details about this parameter, please refer to *RC Parameter Guide*.

A Shared Order Form is created just like a standard Form in 'Forms'. The difference is that it is applied to the resource in a special field next to the Form field. A resource can have a normal Form OR a Shared Order Form applied.

Reservation	
Subject:	Shared order form
From: 30-09-2016 14:30 (Friday)	Collapse All
To:	order details
30-09-2016 15:00 (Friday)	Region
	Your Region cannot be determined - please specify: Asia
	Meeting Rooms
	Meeting Room 001 (resource1@rc37.com)
	Meeting Room 002 (resource2@rc37.com)
	Comment
	\sim
	LARGE ROOM SOF
	Number of Guests
	Account Number
🗸 🗉 🎽	

Figure 2. Shared Order Form



CHAPTER 2.

How to book a shared order with multiple resources

There are 2 ways to book resources with the same shared order:

One-step ordering

Book an appointment with multiple resources by ResourceFinder

Like normal booking, organizer opens his Outlook calendar, selects time of the appointment by double clicking the time slot in the calendar to open "**Appointment**" window:

8 5	ଏ ↑	ψ =		Untitle	ed - Appointment	1		Ŧ	-		×
File	Appointm	nent Insert	Format	Text Revie	w OutlookSp	oy ♀ Tell	me what yo	u want to	do		
Save & Dele Close	🕻 🖪 ete 😋 🗸	Appointmer		Skype Meeting	ResourceFinder	Meeting Notes	Invite Attendees	Options	► Tags	Office Add-ins	
Action	ns	Show		Skype Meet	ResourceFinder	Meeting N	Attendees			Add-ins	~
Subject											
Location											•
Start time	Wed 10/5	5/2016		10:00 AM	▼ 🗌 All o	day event					
End time	Wed 10/5	5/2016		10:30 AM	•						

Figure 3. Appointment window

Select ResourceFinder on the ribbon to go to Resource Finder.

In ResourceFinder, mouse over to the list of resources. Check the boxes to select resources that have the same shared order form. For example, resources equipped with VTC (VTC resources).

Save & Reset Close Action	Selected Resources Language	·				
Date and Time Start time 13:08-2016	Resource Overview					
End time	▲ RESOURCE	CAPACITY	10:00	11:00	12:00	13:0
13-08-2016 13:30 -	Board Room 0204	20				
	Conference Room 0103	12				
 August, 2016 	Meeting Room 001	5		-		
Mo Tu We Th Fr Sa Su	Meeting Room 002	10		11:00 - 11:30		
1 2 3 4 5 6 7	Meeting Room 003	7		Organizer: Adn		
8 9 10 11 12 13 14	Meeting Room 004	12		Administrator@	prc3/.com	
15 16 17 18 19 20 21	VR3-0104	0				
			<			
22 23 24 25 26 27 28						

Figure 4. ResourceFinder screen view



NOTE: Selected resources must have the same Shared Order Form attached. Otherwise RF will display a warning.

Click [Order Form] to open Shared Order Form:

Reservation	N .
Subject:	Shared order form
From: 30-09-2016 14:30 (Friday)	□ Collapse All
To:	ORDER DETAILS
30-09-2016 15:00 (Friday)	Region
	Your Region cannot be determined - please specify: Asia
	Meeting Rooms
	Meeting Room 001 (resource1@rc37.com) Meeting Room 002 (resource2@rc37.com)
	Comment
	~
	LARGE ROOM SOF
	Number of Guests
	Account Number
🗸 🗉 🎦	

Figure 5. Shared Order Form in One-Step Ordering

Fill in details then click [Save & Close].

Book a recurring appointment with multiple resources

Basically, booking a Shared Order Form with recurring Appointments works the same as RC today with a normal Order Form. The only difference is, with Shared Order 1.0 feature, more than one resource can be selected for the booking.

Update Shared Order for an occurrence of a recurring appointment

Updating an occurrence in a recurring reservation will not affect other orders of other occurrences in other dates. But this will affect other occurrences' orders in the same date.

Order Confirmation Email in one-step ordering

Still taking the example of VTC resources: After Organizer finishes booking, only assigned Service Providers will receive confirmation email. The organizer only receive email after Service Provider updates (confirms\declines) the order.

The email flow can be described by the following examples:

- a) Book 1 normal reservation with 2 resources.
 - The Organizer makes 1 reservation, booking 2 resources using SOF
 - Service Prodiver receives 1 email, with the SOF order
 - Service Provider can see 1 line in Tasks, with this order



- Service Provider approves or declines the order in the email or in Tasks
- The Organizer receives 1 email

b) Book 5 ocurrences of a recurring reservation with 2 resources.

- The Organizer makes 5 recurring reservations, booking 2 resources using SOF
- Service Provider receives 5 emails, with the SOF orders
- Service Provider can see 5 lines in Tasks, with these orders 1 for each reservation
- Service Provider approves or declines the orders in the emails or in Tasks
- The Organizer receives 5 emails

NOTE: If Service Provider declines an order, email sent to Organizer is marked as 'High Priority'.

Two-step ordering

How to edit Order Form

To edit Order Form in two-step ordering, organizer has to open the order form by clicking [**Click here**] button in the confirmation email sent to him or he can find the order in his MyMeetings. This will open the order form as shown in the figure below:

Shared order form	🖃 Collapse All
RESERVATION DETAILS	
Subject: Project Meeting From: January.12.2017 8:30 AM (Thursday) To: January.12.2017 9:00 AM (Thursday)	
ORDER DETAILS	=
Region Your Region cannot be determined - please specify: Asia Meeting Rooms Meeting Room 001 (resource1@rc37.com) Meeting Room 002 (resource2@rc37.com) Comment	
	^
	>
LARGE ROOM SOF	
Number of Guests Account Number	
Send order	

Figure 6. Form opened from the link in email sent to the organizer



After filling in the details, organizer clicks [Send Order] to confirm. Emails will be sent to Service Providers.

Order Confirmation Email in two-step ordering

At two-step ordering, Organizer receives an email for new Reservation, he then opens the Reservation, fill Shared Order Form information and sends it. After sending Order, he will not receive email again until Service Provider updates Order (like One Step ordering).



CHAPTER 3. How a Service Provider handles shared orders

In the example of considering VTC as a shared activity: A Service Provider is a person employed in one of the Service Provider organissation. He is responsible for orders sent from Organizer.

NOTE: Service Provider should be placed in root location (Locations) to be able to see orders for resources in all child resources.

There are 2 ways for the assigned Service Provider assigned with property(-ies) appearing in the order – to go to the order assigned to him:

<u>Option 1</u>: Sign in Resource Central, select [**Tasks**] on the menu, (If you want to know more about details of "**Tasks**" tab, see "**Tasks**" section in **Resource Central Administrator Guide**). The list of order assigned to him appears on the right panel of the screen.

Resource Central	Tasks - Thursday, 12-Ja	nuary-2017					Host (Security)	0
🔆 Tasks	🖶 PRINT 💮 PRINT ALL 🖹 DI	ECLINE 🗸 CONFIRM			REGION ALL	SELECTED DATE POPEN 📋 ALL 🍸 FILTER	Shared Order No.	Q
Jan 2017	Task List							
Jan 2017 → Su Mo Tu We Th Fr Sa	Date	▲ Order Number	Reservation at	Resource	Organizer	Subject	Status	
5 26 27 28 29 30 31	12-January-2017 12:00	29	12:00 - 12:30	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 5	New	
2 3 4 5 6 7	12-January-2017 12:30	30	12:30 - 13:00	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 6	New	
9 10 11 <mark>12</mark> 13 14	12-January-2017 13:00	31	13:00 - 13:30	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 7	New	
16 17 18 19 20 21 23 24 25 26 27 28	12-January-2017 13:30	32	13:30 - 14:00	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 7	New	
20 24 25 20 27 28 30 31 1 2 3 4	12-January-2017 14:00	33	14:00 - 14:30	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 8	New	
	12-January-2017 14:30	34	14:30 - 15:00	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 9	New	
Today	12-January-2017 15:00	35	15:00 - 15:30	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate - no trace	New	
	🗌 🗄 12-January-2017 15:30	37	15:30 - 16:00	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 10	Deleted	
	12-January-2017 16:00	38	16:00 - 16:30	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 11	New	
	12-January-2017 16:30	39	16:30 - 17:00	Søren 5 (SOF)	ssk ssk@add-on.com	SSK delegate 12	New	

Figure 7. Tasks panel

If you want to preview details of an order, click the plus icon [+] next to the date of that order, its details will be expanded for you to see:

Date	 Order Number 	Reservation at	Resource		Organizer	Subject		Status	
12-January-2017 12:00	29	12:00 - 12:30	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 5		New	
12-January-2017 12:30	30	12:30 - 13:00	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 6		New	
12-January-2017 13:00	31	13:00 - 13:30	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 7	SSK delegate 7		
12-January-2017 13:30	32	13:30 - 14:00	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 7		New	
12-January-2017 14:00	33	14:00 - 14:30	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 8		New	
12-January-2017 14:30	34	14:30 - 15:00	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 9		New	
12-January-2017 15:00	35	15:00 - 15:30	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate - no trace		New	
E 12-January-2017 15:30	37	15:30 - 16:00	Søren 5 (SOF)		ssk ssk@add-on.com	SSK delegate 10		Deleted	
Meeting Rooms							Information	Status	
Søren 5 (SOF)							Deleted	Deleted	
TestResource6 (SOF)							Deleted	Deleted	
Extra services for your meeting	9			Value			Information	Status	
Video Conference				Yes			Deleted	Deleted	
Comments									

Figure 8. Preview an order

Click an order. Make any change and click [Save].



Resource Central	Task 38						Hos	t (Security)
Tasks	🔲 LIST 💮 PRINT 🕃 CONFIRM 🖹 DECLINE							
 ✓ Jan 2017 → 	Task Details							
Su Mo Tu We Th Fr Sa 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21	Resource Start time: 12-January-2017 1600 End time: 12-January-2017 1630							
22 23 24 25 26 27 28 29 30 31 1 2 3 4	Organizer: ssk [ssk@add-on.com]							
Today	Meeting Rooms							Change Resource
	▲ Name	1	Information		Status			
	Meeting Room 001 Meeting Room 002				Set All New New	>		
	Extra services for your r	neeting						
	▲ Name	Value		Information		Status		
	Video Conference	Yes				Set All New	>	
	* Message							

Figure 9. Shared Order Form details

If you click [Change Resource], the Change resource webpage dialog appears with all resources in the order being checked:

Gave & Close Reset	Available Resources	Selected Resources										
Locations	<	Resource Overview							Selected	📕 Own 📕 Book	ed 🔳 Closed	🕖 Buffer Ti
Categories		▲ RESOURCE	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM	01:00 PM	02:00 PM	03:00 PM	04:00 P
Search and Filter		Meeting Room 001										
		 Meeting Room 002 										N
			4									

Figure 10. Change resource webpage dialog

Note: Language used in this webpage dialog is the language being used in RC backend.

If you want to remove any resource in the reservation, uncheck that resource in the list, then click [Save and Close].

If you want to add more resources to the order, click [Available Resources] button to open a new list of available resources for you to add:

source Central											-
i 🔁 🔁 📘											
ave & Close Reset Availab Resource	ble Selected Resources Floor plan										
Action	View										
Locations	Resource Overview										
Locations	[*] Resource Overview							Selected	📕 Own 📕 Boo	ked 📕 Closed	🕖 Buffer Tim
	Resource Overview Resource	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM	Selected	Own Boo	ked Closed	W Buffer Tim
Categories		07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM			_	
Categories	▲ RESOURCE	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM			03:00 PM	
Categories	RESOURCE Meeting Room 003	07:00 AM	08:00 AM	09:00 AM	10:00 AM	11:00 AM	12:00 PM		02:00 PM	03:00 PM	
 ▷ Locations ▷ Categories ▷ Search and Filter 	RESOURCE Meeting Room 003 Meeting Room 004	07:00 AM	08:00 AM		10:00 AM				02:00 PM	03:00 PM	

Figure 11. Available resources to add



Check on the resource(s) you want to add to the reservation, then click **[Save and Close]**. That resource will be inserted to the reservation with "**Added**" label in the Information column. The eliminated resource will also have "**Removed**" label in that column:

lame		Information
Veeting Room 001		
Meeting Room 002		Removed
Conference Room 007		Added
xtra services for your r	meeting Value	

Figure 12. Reservation with added and removed resources

Option 2: In the email sent to Service Provider, click the link ([Click here] button):

New Reservation - Shared Order Number 138	
If you want to change properties of the Order, please Click here If you want as Organizer to change meeting room then go to Outlook or Resource Finder	

Figure 13. Email sent to assigned Service Provider

The order form is opened from the link as shown in the figure below:



Resource Central								
Reply								
You can only edit the parts of the order that you are responsible for. A new order confirmation will be sent to the organizer and the other people to which the change(s) applies.								
∧ Meeting Rooms								
▲ Name	Information		Status					
			Set All	•]			
Meeting Room 001			New	•				
Meeting Room 002			New	•				
 Extra services for your meeting]							
Name Value		Information		Status				
				Set All	•			
Account Number				New	•			
Video Conference Yes				New	•			
🗄 Add								
∧* Message								
∧Comment								

Figure 14. Order form opened from the link in Confirmation Email

Make any change as you wish and click [Send Reply].

After this, the order will appear in **Tasks** panel opened by the assigned Service Provider.

To know more about buttons on the toolbar of this panel, please refer to "Tasks" section in *Resource Central Administrator Guide.*