



Shared Order 1.0 User Guide

For RC 4.1

Document Revision 02

Add-On Products
Roms Hule 8 – 7100 Vejle – Denmark
Phone: +45 7944 7000 Fax: +45 7944 7001

Mail: info@add-on.com
Internet: www.add-on.com



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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:

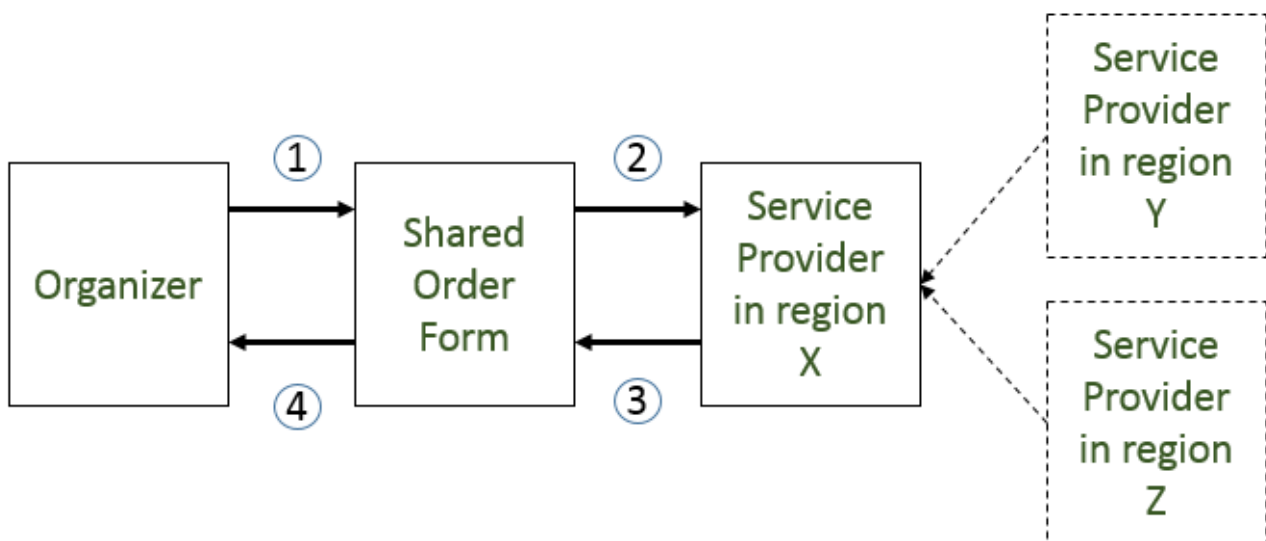


Figure 1. Work-flow

- 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.

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:

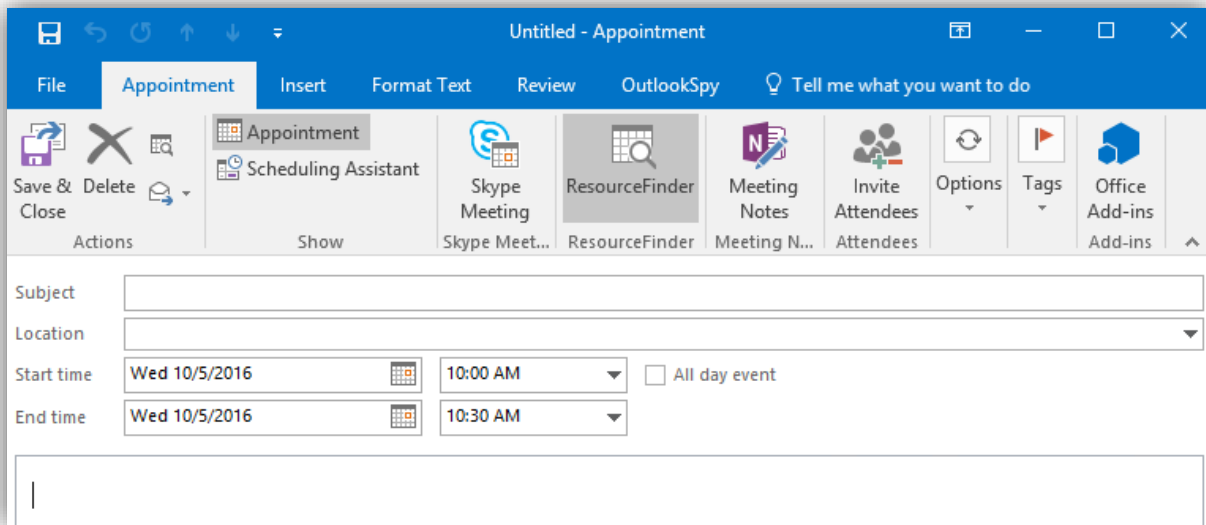


Figure 3. Appointment window

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).

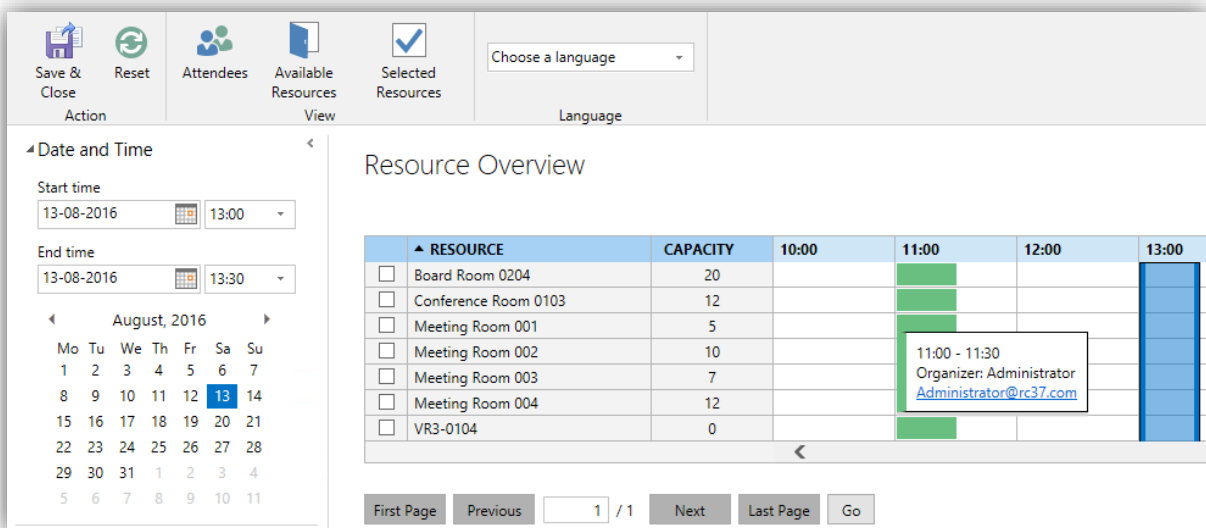


Figure 4. ResourceFinder screen view

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:

4 Reservation
Subject:
From:
30-09-2016 14:30 (Friday)
To:
30-09-2016 15:00 (Friday)

Shared order form

Collapse All

ORDER DETAILS

Region
Your Region cannot be determined - please specify:

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 Provider 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 occurrences 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:

Meeting Rooms
 Meeting Room 001 (resource1@rc37.com)
 Meeting Room 002 (resource2@rc37.com)

Comment

LARGE ROOM SOF

Number of Guests
 Account Number

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 organisation. 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:

Option 1: 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.

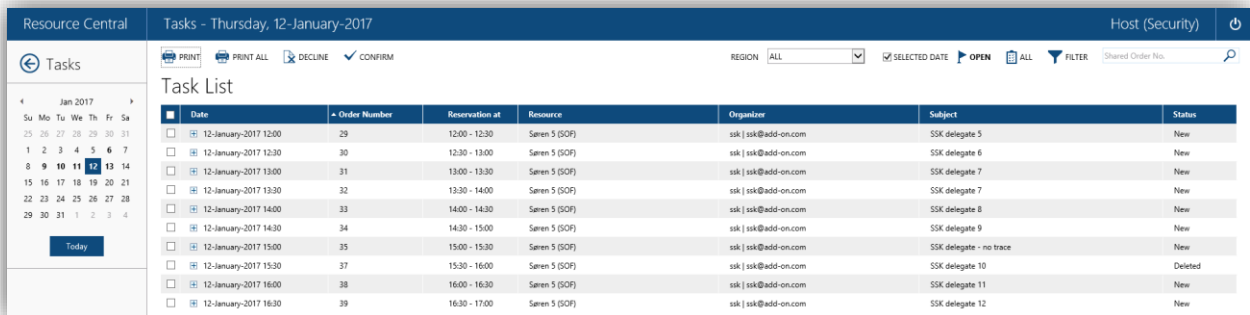


Figure 7. Tasks panel

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:

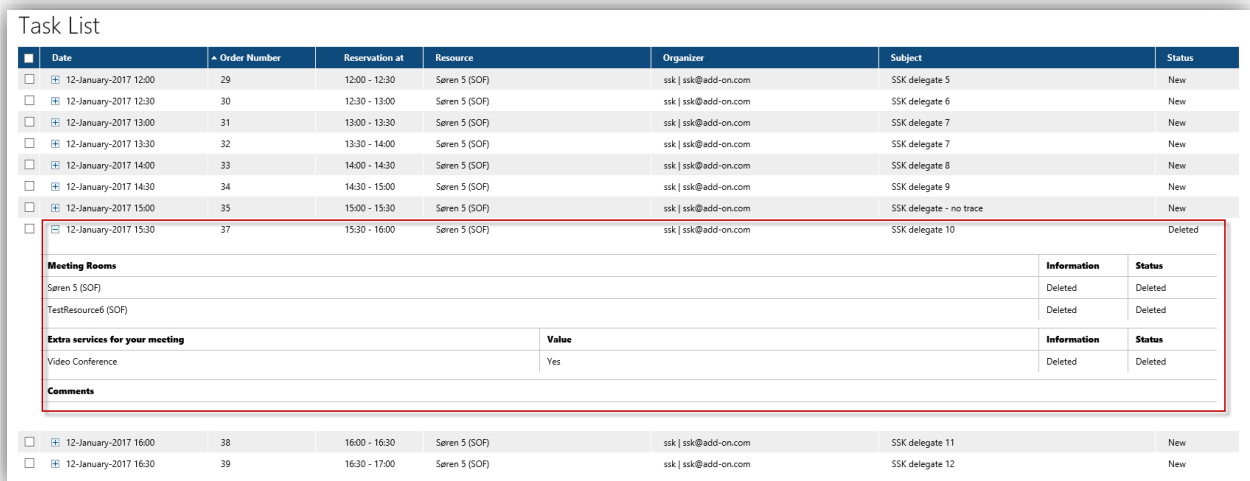


Figure 8. Preview an order

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

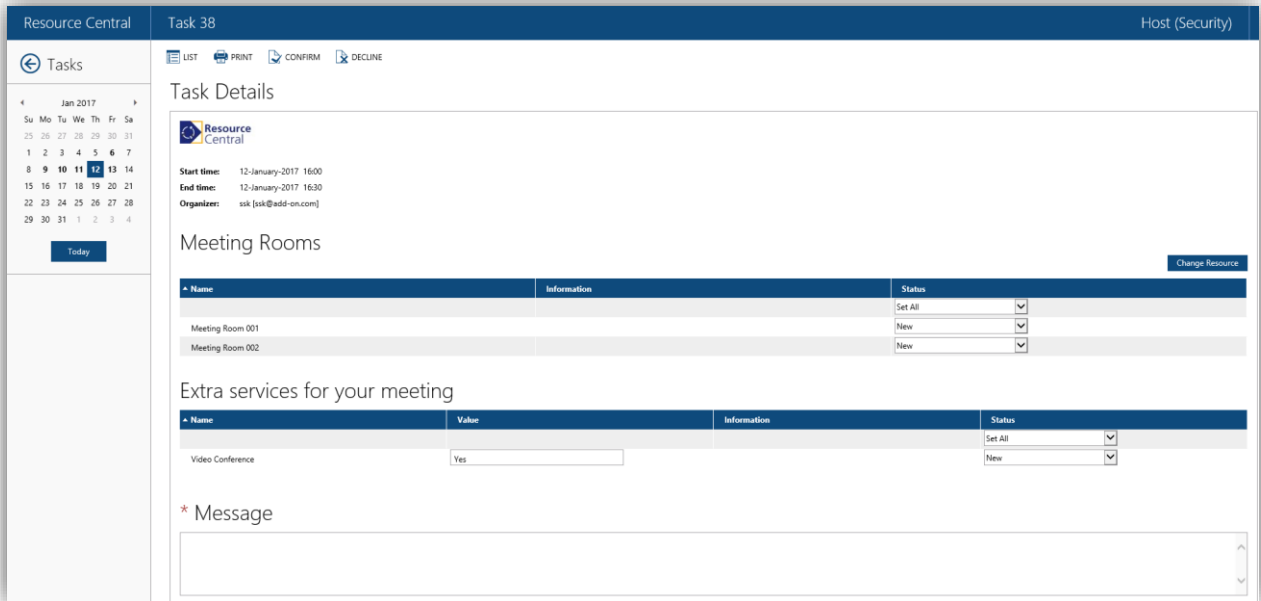


Figure 9. Shared Order Form details

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

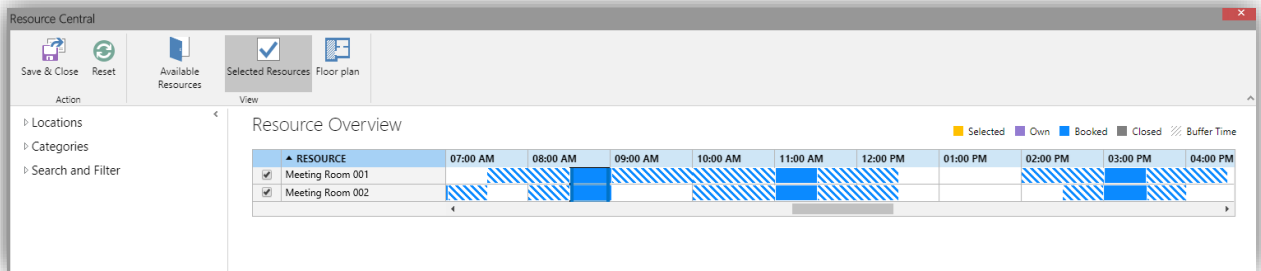


Figure 10. Change resource webpage dialog

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:

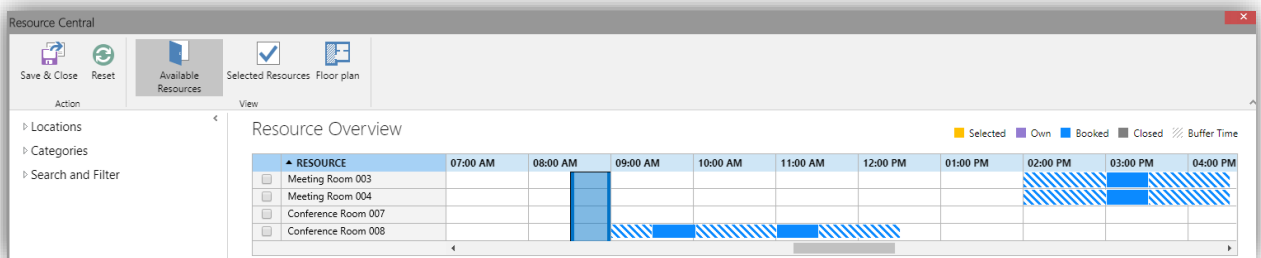


Figure 11. Available resources to add

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:

Meeting Rooms

Name	Information
Meeting Room 001	
Meeting Room 002	Removed
Conference Room 007	Added

Extra services for your meeting

Name	Value
Video Conference	Yes

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:

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.

↗ Detailed information about your booking

^ 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	<input type="text"/>		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**.