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# User Guide

**For RC 4.1**

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## Foreword

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Resource Central is developed by Add-On Products and used for resource management, synchronizing with Microsoft Outlook® and an Exchange Server. Resource Central helps organizations to define, manage and maintain their resources in small organizations with one location and in Enterprise organizations with many geographical locations. It also provides an integrated solution for authorized users to arrange meetings and events along with extra service orders through a customizable user-friendly interface which can track the status of orders.

Yours sincerely  
The Resource Central Team

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## CHAPTER 1.

# Create a meeting from Outlook

Use the Microsoft Outlook® calendar to book meeting rooms and order associated Services and Catering for your meetings:

## Room booking

Create a new meeting request in your Outlook® calendar. Fill in all the information as you usually do – such as:

- Subject
- Time slot
- Attendees
- Agenda

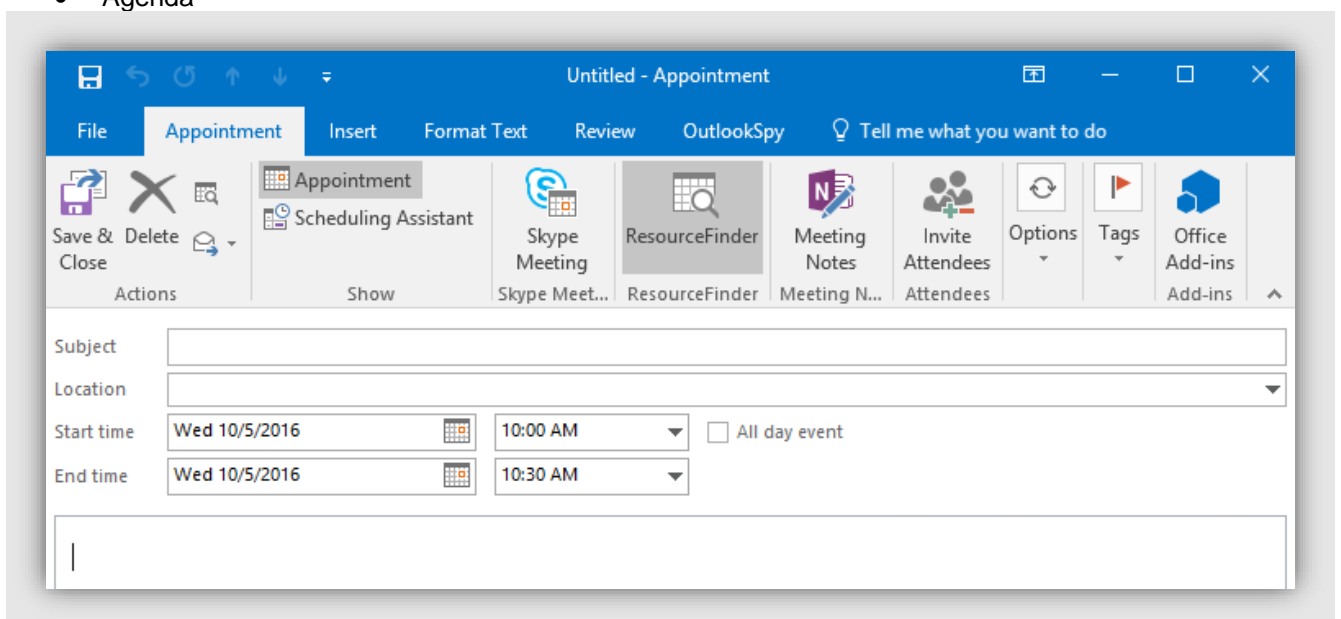


Figure 1. Room Booking

Click on the **ResourceFinder** (RF) button in order to locate the room you would prefer for your meeting.

RF allows you to book associated services related to your meeting – such as:

- catering
- table arrangements
- visitor details
- define cost center
- ... and more

CHAPTER 2.

# Use ResourceFinder to find a meeting room

The RF application will help you, easily and intuitively, locate the meeting rooms which will suit your needs.

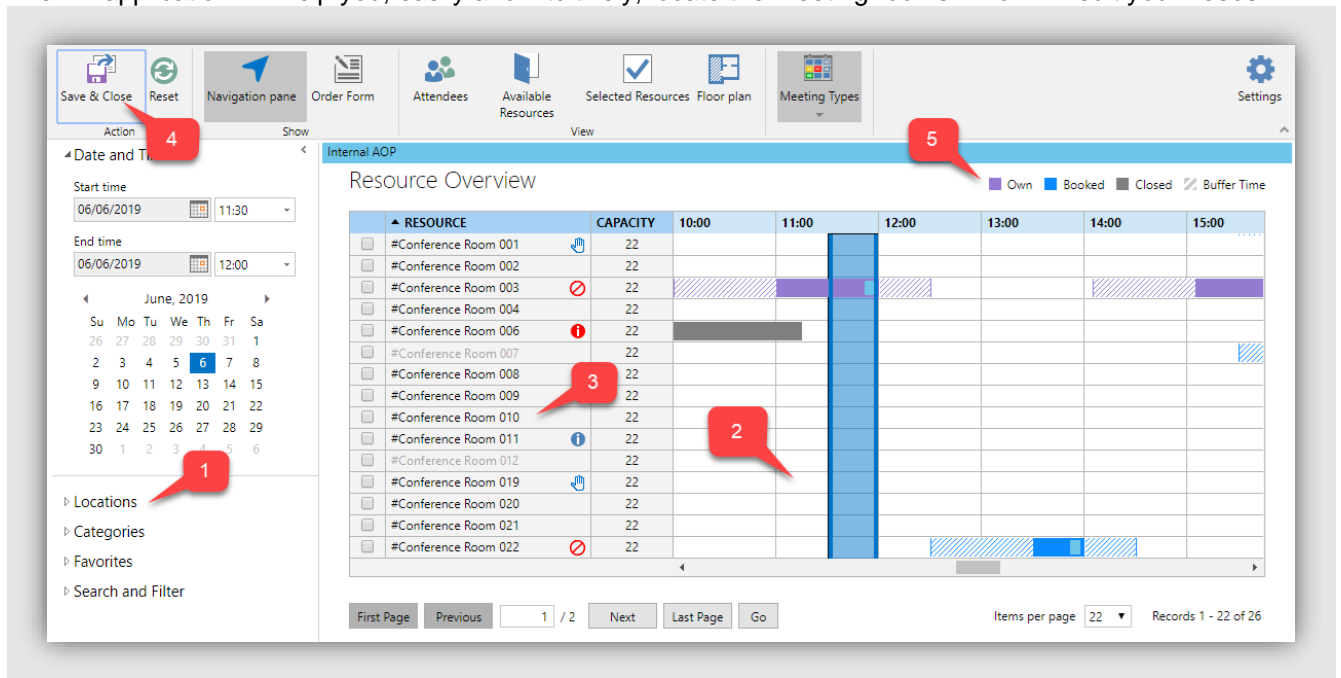


Figure 2. ResourceFinder Main Screen

1. Use the RF **Location** tree to find a meeting room at any location in your organization. When you click on a location all meeting rooms in this location will be listed in the main section of the window.
2. The **availability** of the meeting rooms will be displayed.
3. To choose a room you mark the **checkmark** on the desired resource.
4. To finalize the booking in RF select the [**Save and Close**] button.
5. Please note the **legend symbols**.  
If your company is using booking policies to govern booking of resources, you will see icons next to a resource to know if you can book that resource.

Icon	Descriptions
	You cannot book this resource because your meeting request conflicts with the resource's booking policies.
	You do not have permission to book this resource. If this icon shows up next to a virtual resource, it warns that the child resources are not similarly configured in Exchange Server, leading to the booking being blocked.
	Booking this resource requires approval by the resource's delegate. Your request will be forwarded, pending approval.
	You can book this resource for the meeting, but be aware of the conflicted occurrences.

### Floor plan

Resource Central provides an additional feature to help you locating the resource you want to book for a meeting, it is called Floor plan. This function can be turned on by the system Administrator. When it is enabled, you can see the **[Floor plan]** button on the toolbar. Click on it, the **Floor plan** section is available on top of **Resource Overview** section as shown in the figure below:

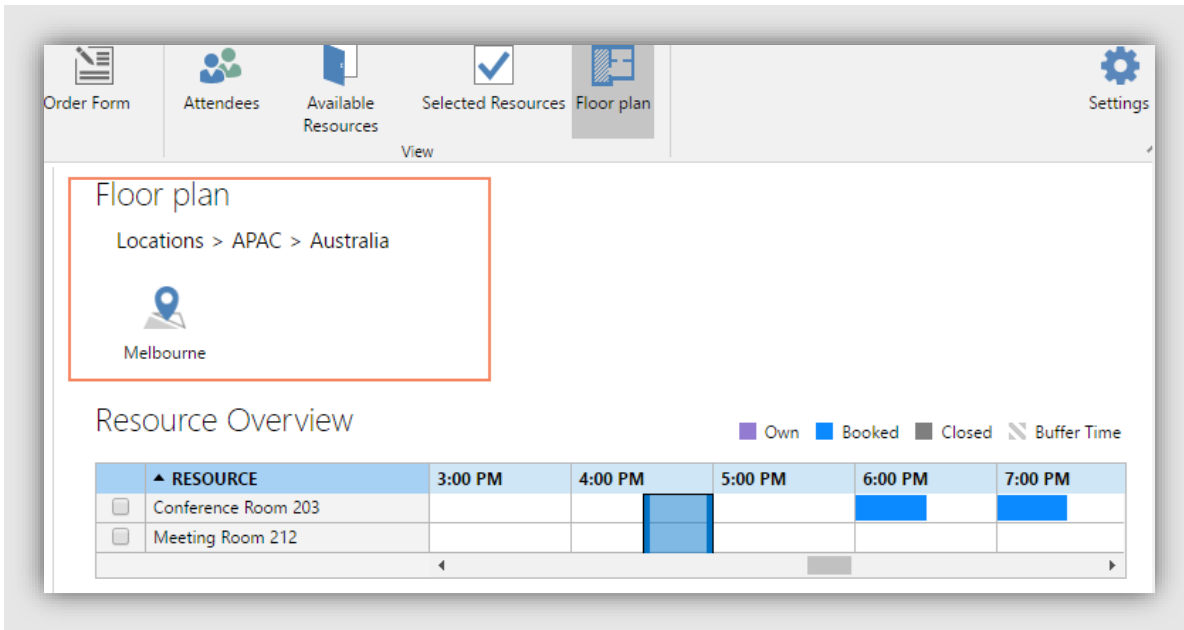


Figure 3. Floor plan enabled

You can click on the location name and the floor plan of that location is displayed on the right, and the list of resources in that location is displayed in **Resource Overview** section.

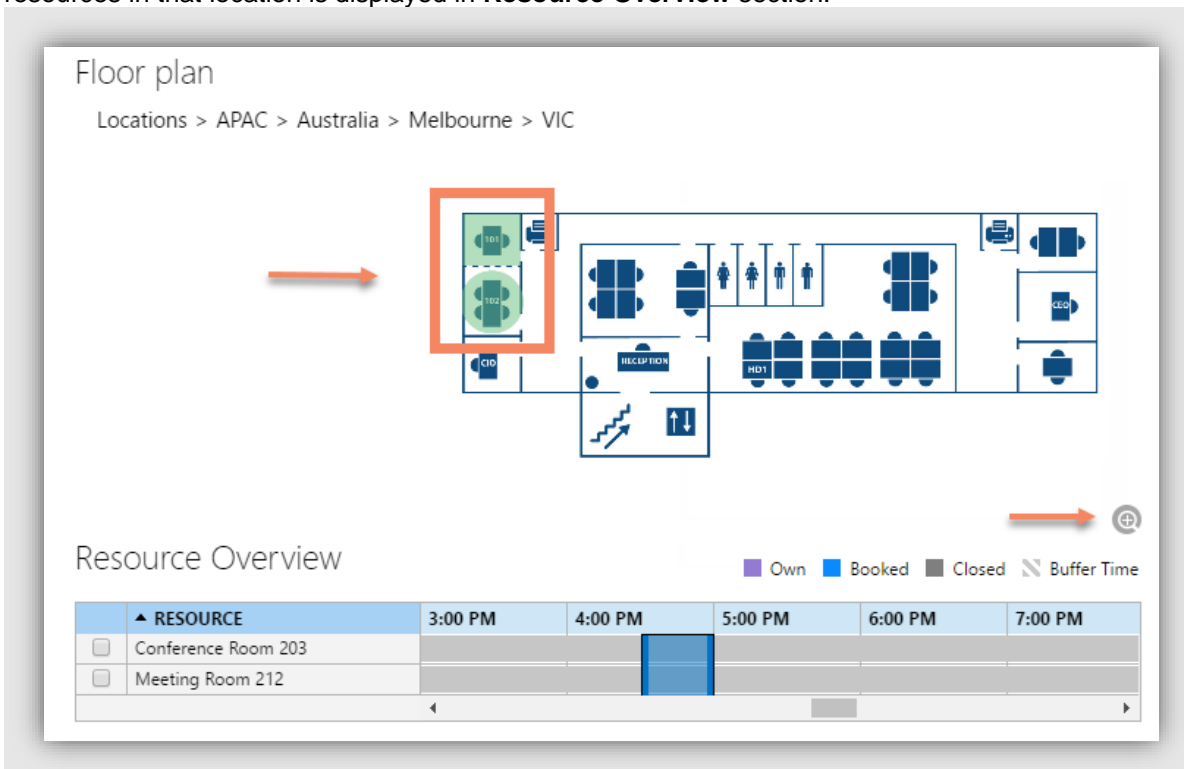


Figure 4. Floor plan display

If you want to see the floor plan in bigger size, click the magnifier button (see the arrow in the screenshot) to enlarge it.

From the floor plan, you can click on a resource, and this resource will be selected with checked symbol in the resource list.

## CHAPTER 3.

## Complete your meeting request

Once the RF is closed you will go back to the Outlook® meeting request.

Here you need to select [**Send**] button in order to finalize the meeting request.

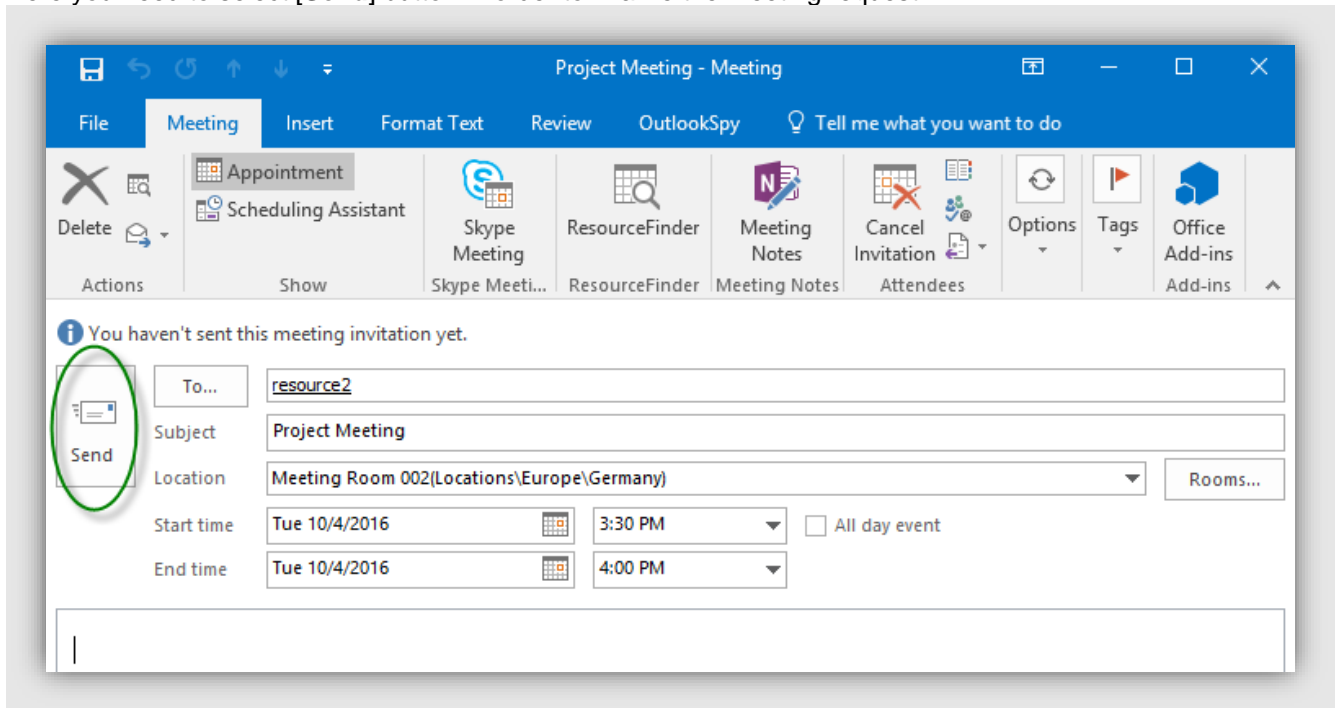


Figure 5. Meeting Request

Shortly after this you will receive one or two emails as confirmation of your booking.

One of the emails might be from the Outlook®/Exchange environment and the other one will be from Resource Central.



## CHAPTER 4.

## Ordering services for your meeting

In the email from Resource Central you will find a summary of the reservation in regards to the selected meeting room and the time slot. However you will also find a link which enables you to order associated services for your meeting. This is identified with the “**Click here**” hyper-link.

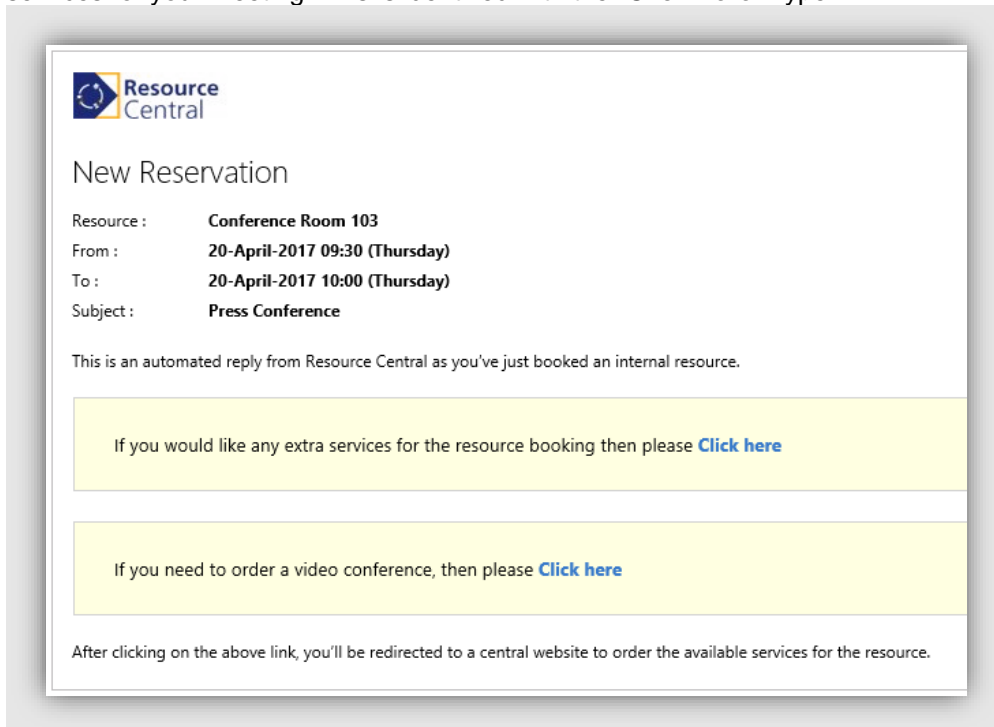


Figure 6. Order Mail

When you click on the link you will open up an order form which belongs to the selected meeting room. This will feature the services enabled for this particular meeting room.

### Order Form

The order form is customizable, per meeting room, and as such the image below is just an example.

The order form will feature all the associated services available for the meeting room you've booked.



RESERVATION OF BOARD ROOM 202

From **20 April 2017 12:30 (Thursday)** Subject **Press Conference**  
 To **20 April 2017 13:00 (Thursday)** Description **Romance Standard Time**  
 Location **Locations** Capacity **0**  
 Minimum Hours - Latest deadline for when a Resource Central order can be created **0**

BOARD ROOM 202 order

If you require extra services for your resource booking, please enter the number of deliveries, and fill out this form.

Number of deliveries    
 1st service

**Serving 1**

Drinks    
 Food

Name	Price	Qty	Quota
Cake 111	20.00	1	
Catering Total			0.00

ATTENDEES

Register attendees

EXTRA SERVICES FOR YOUR MEETING

AccountNo    
 Department

Send Order

Shared Order Form

**RESERVATION DETAILS**

Subject: **Press Conference**  
From: **20 April 2017 12:30 (Thursday)**  
To: **20 April 2017 13:00 (Thursday)**

**ORDER DETAILS**

**Region**  
Your Region cannot be determined - please specify:

**Meeting Rooms**  
Board Room 202 (room2@psmax.com)

**Comment**

**SHARED ORDER FORM 07**

Host Name

Figure 7. Order Form and Shared Order Form opened from the links in email sent to organizer

On this sample order form you're able to book catering services. To order just select the desired number of services and items needed for the meeting.

Other different services could be to register external attendees, order AV / IT equipment or utilize electronic meeting room signs.

Once you've completed the order form, click the [**Send Order**] button.

After the order form is processed you will see an online confirmation with a unique order number you can use for a reference.

Hereafter Resource Central notifies all concerned departments / persons about the services you've ordered.

## Order Confirmation

You will also receive a confirmation email with a detailed summary of your order.

Should you at any point choose to delete or move your Outlook® meeting to another time slot then the selected meeting room and your order will be automatically deleted (if deadline is not reached) or moved (if deadline is compromised).

The departments / person delivering the services will also be informed automatically about the change.

Should you, at any point, want to change any of the services ordered then you need to select the hyper-link [**Click here**].

## CHAPTER 5.

# My Meetings

## My Meetings in Microsoft Outlook

In Outlook® you have another Icon in your toolbar named **My Meeting**. This application is also a part of Resource Central like the Resource Finder is. The function of My Meeting is to help you keep track of all your orders for your future meetings.

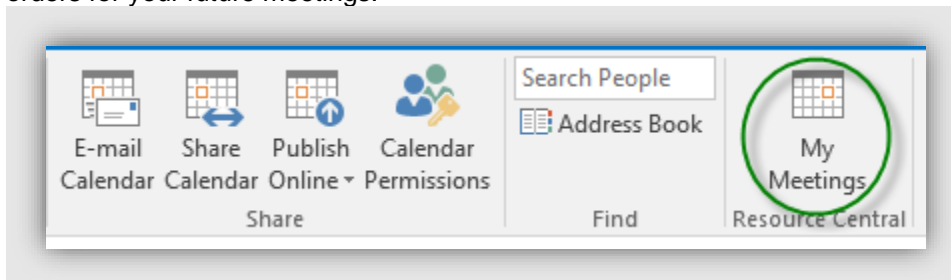


Figure 8. My Meetings

My Meeting is accessible from Outlook's® main panel.

### My Meetings navigation

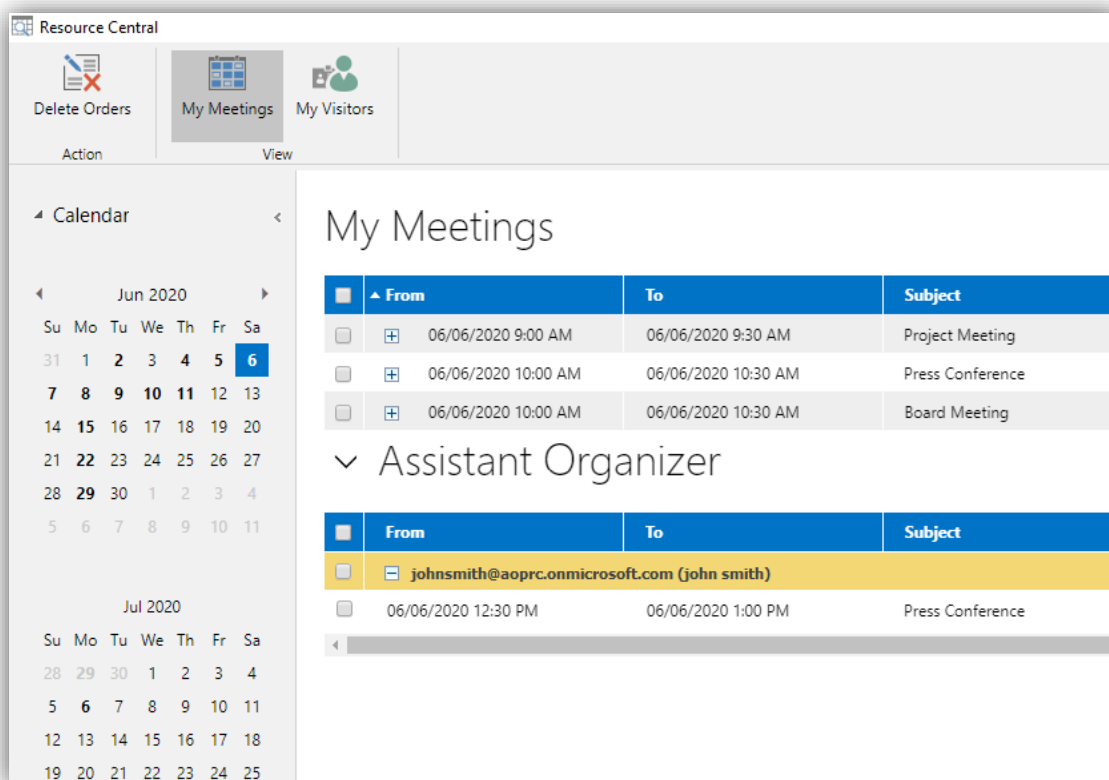


Figure 9. My Meetings Navigation

On the left side of the window you will find the date picker area where all the dates on which you have booked a meeting will be highlighted in **bold**.

In the main section of the window you will find all the meetings listed for the date and from here an order can be created, changed or deleted.

Again, the appropriate order form will be opened and you can, as described earlier, select the services or the changes you want for the meeting.

**Deleting Order associated with Meeting(s)**

To delete an order please mark the box on the meeting entry in the list and select the “Delete Orders” in the toolbar.

**NOTE**

- The [Delete] button will only delete your order in Resource Central. It will not cancel your meeting reservation in Outlook®.
- If the reservation has multi-room catering, then the Shared Order is always put on the first line in My Meetings list

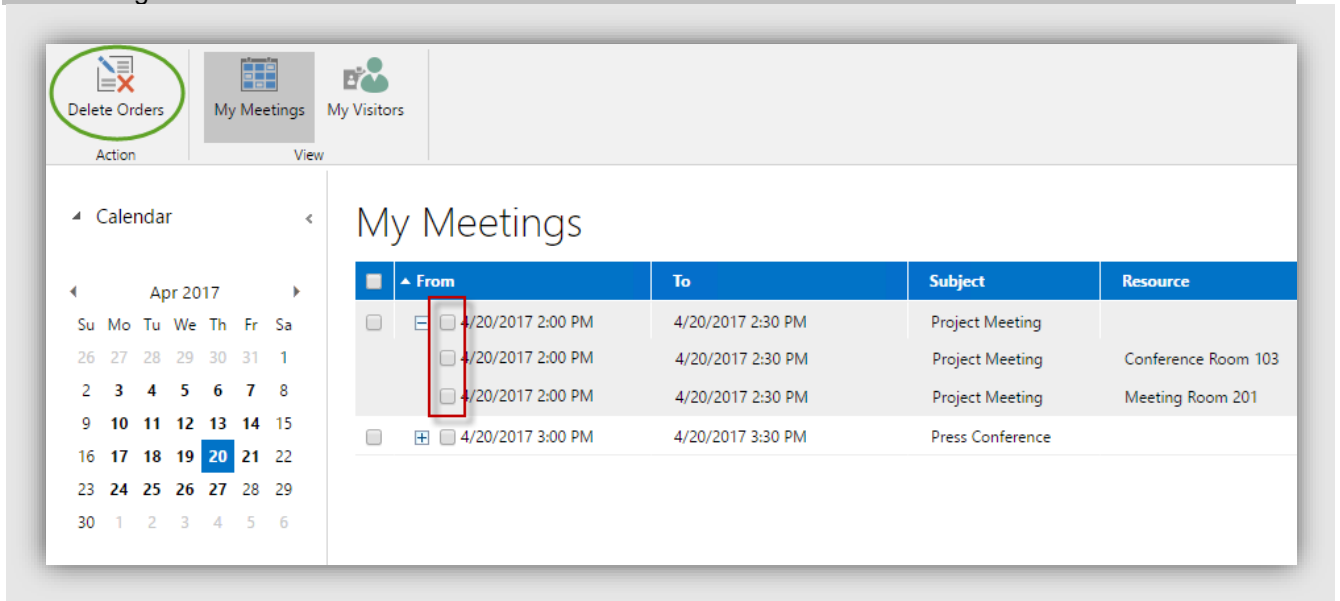


Figure 10. Delete orders

In the figure above, the first order is a Shared Order. 2 others are Normal Orders.

In the following figure, the first line has no checkbox next to it, meaning the Shared order is not created yet.

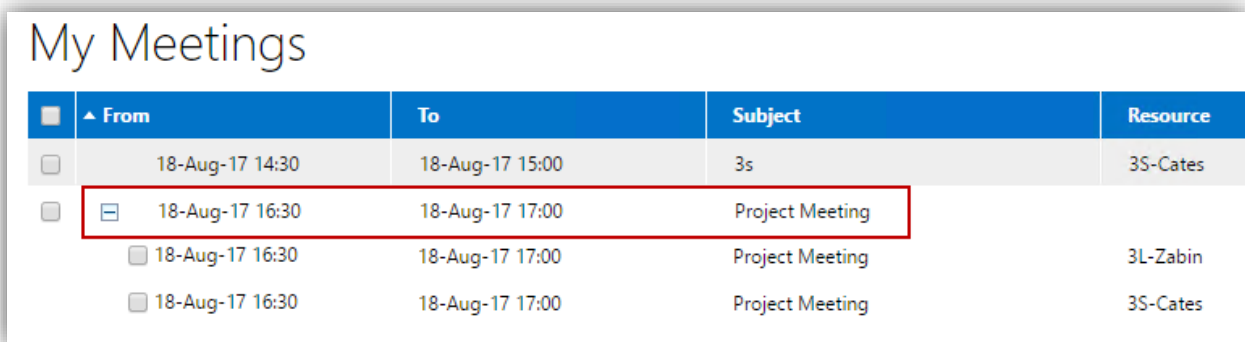


Figure 11. Multi-Room Booking without shared order

You can click on it to book a shared order. If you do, then the checkbox will show up on the first line, next to the Start time of the meeting.

**NOTE:** If the reservation has multi-room catering, then the Shared Order is always put on the first line in My Meetings list. Remember this to select the correct orders for deletion.

## Managing Visitors

You can manage all visitors in My Meetings by clicking [**My Visitors**] button, which will open the visitors list in the selected date:

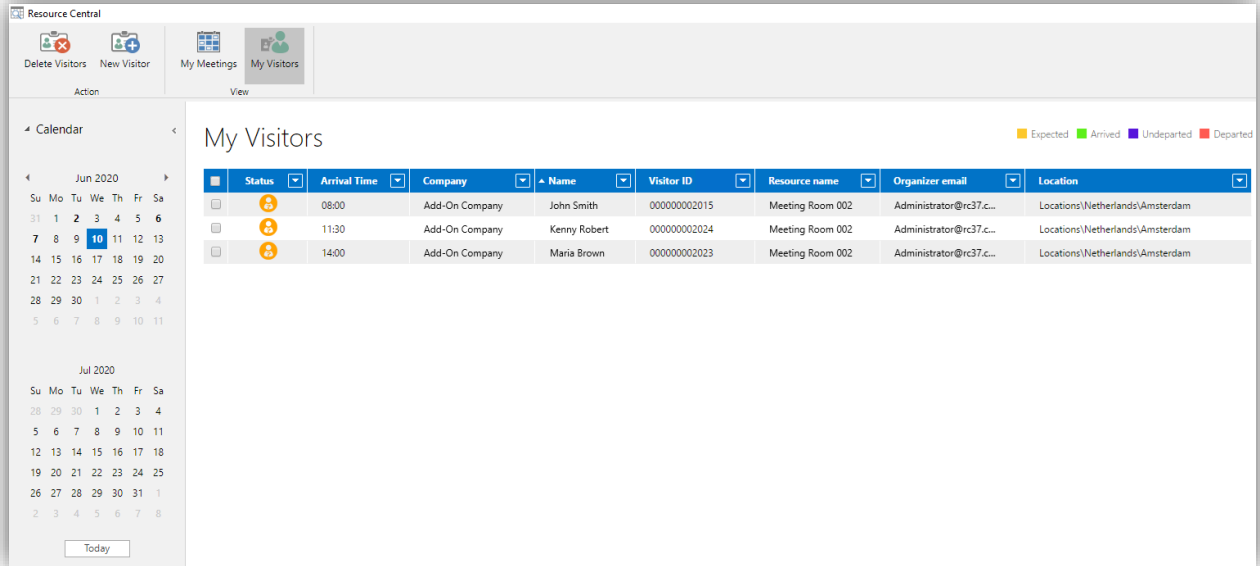


Figure 12. My Meetings – Visitors list

Button	Description
<b>New Visitor</b>	Add a visitor to a meeting or a person/user
<b>Delete Visitor</b>	Delete the selected visitor(s)
<b>My Meetings</b>	Go back to My Meetings list

Clicking on [**New Visitor**] enables you to add a new visitor to a meeting or a person:

The screenshot shows a 'Visitor Details' form with the following fields:

- Arrival Date: August-17-2017, 00:00
- Title: [Empty text box]
- Email: [Empty text box]
- Company: [Empty text box]
- Visitor Id: [Empty text box]
- \* Name: [Empty text box]
- Cell. / mobile number: [Empty text box]
- Category: [Empty text box]
- Visitor Type: A dropdown menu with options 'Reservation' (selected), 'Reservation', and 'Person'. A red box highlights this section.
- \* Meeting: [Empty text box] with a blue '...' button to its right.

Figure 13. Add a visitor to a meeting/person

Fill in necessary information and click [**Save**] to finish.

## My Meetings in Microsoft Teams

Apart from Outlook, My Meetings can be accessed via Microsoft Teams. With this feature, Microsoft Teams users are able to see all their team meetings with orders in My Meetings so that they can make or change existing orders for a team meeting.

**NOTE:** Teams meetings can only be seen in Microsoft Teams. They will not show up on Microsoft Outlook.

### How to open the app in Microsoft Teams

When you open Microsoft Teams and click the [...] button on the left menu, you can see **Resource Central** in the list of apps:

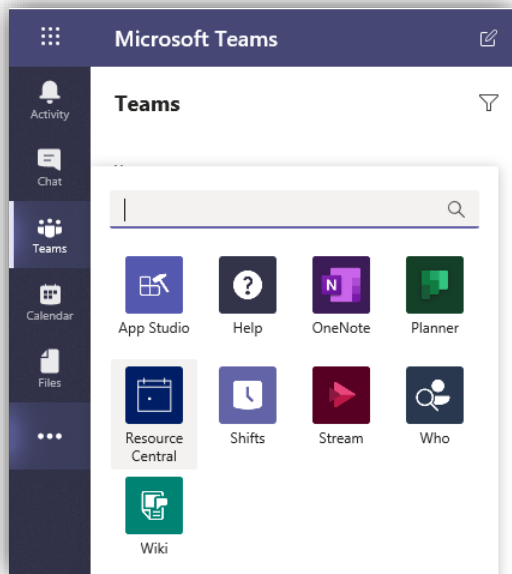


Figure 14. Apps in Teams

Click on **Resource Central** app icon and you can go to **My Meetings** interface.

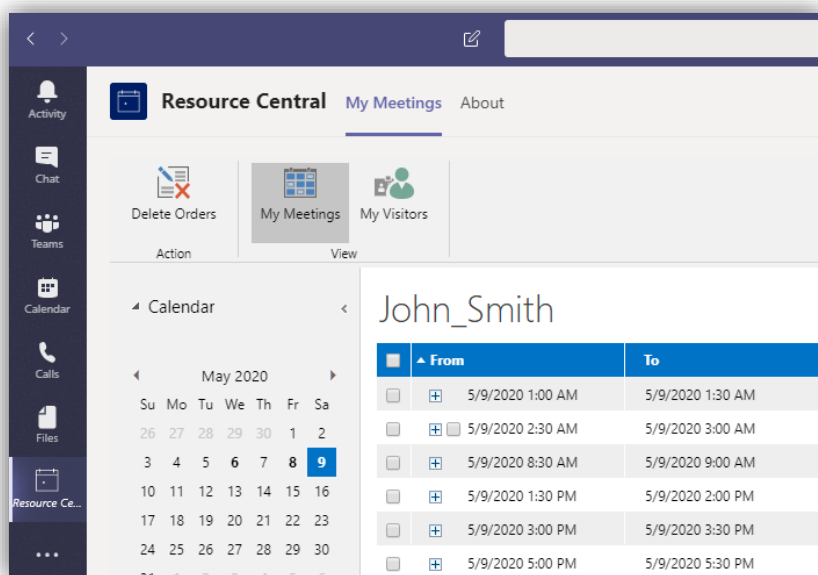


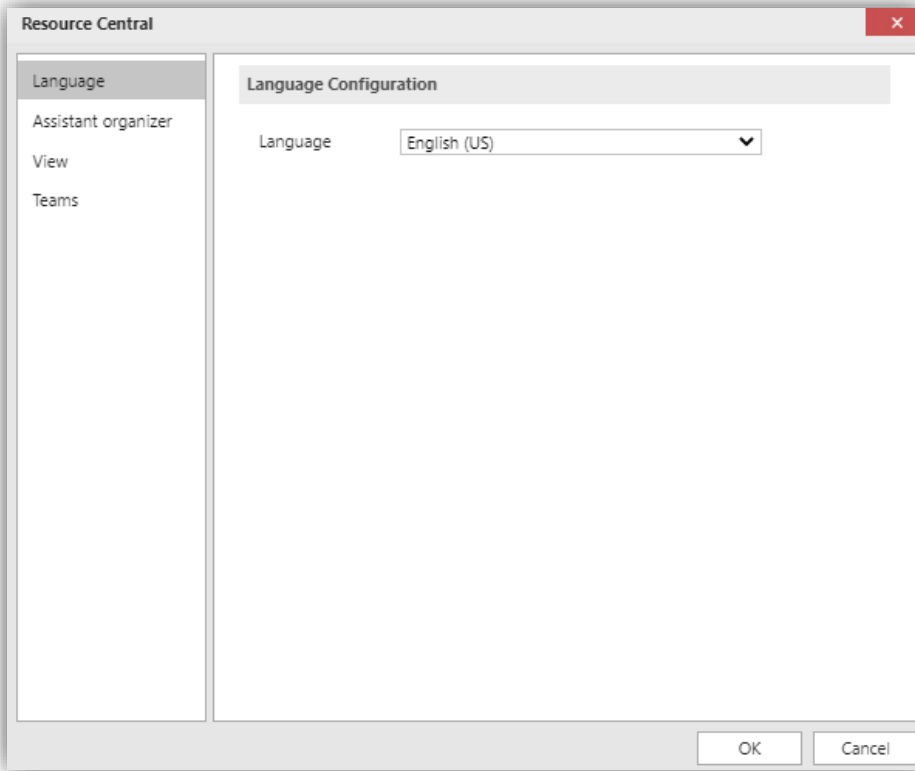
Figure 15. My Meetings in Teams

Now you can perform actions similar to those with My Meetings in Outlook.

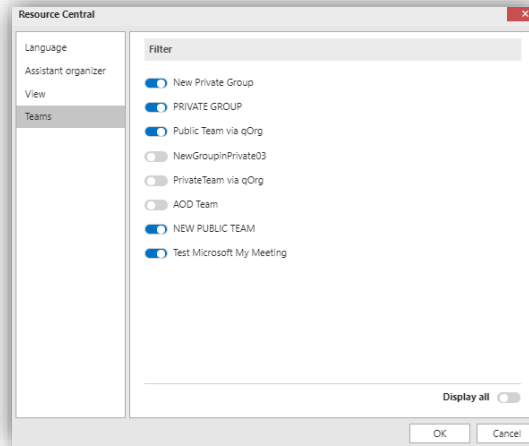
### Settings for My Meetings in Microsoft Teams

In My Meetings screen in Microsoft Teams, click [**Settings**] button at the upper right corner of the screen, the following dialog shows up:





Tab	Description
Language	Select language to be used for My Meetings in Microsoft Teams
Assistant organizer	Enable Assistant organizer function and select one. <div data-bbox="552 1211 1066 1554" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Assistant Organizer Configuration</p> <p>Assistant organizer</p> <p><input checked="" type="radio"/> Enabled <input type="radio"/> Disabled</p> <p>Default Assistant</p> <p>aoprc_sp@aoprc.onmicrosoft.com</p> <p>Email flow</p> <p>Primary AND assistant organizer</p> <p><i>Note: An Assistant Organizer can receive the same emails from Resource Central as the organizer and can handle orders on behalf of the organizer.</i></p> </div>
View	Select if you want available resources are displayed <div data-bbox="552 1659 1066 1845" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Language</p> <p>Assistant organizer</p> <p><b>View</b></p> <p>Teams</p> <p><b>View Configuration</b></p> <p>Display Available Resources as default</p> <p><input type="radio"/> Enabled <input checked="" type="radio"/> Disabled</p> </div>
Teams	Enable or disable teams shown in My Meetings in Microsoft Teams



You might not want to show all the teams, that you are connected to. This filter allows you to select only the ones, that you find relevant, when it comes to managing orders for specific teams.

### How Assistant Organizer can use My Meetings in Microsoft Teams

When you book a Teams meeting in a channel, the meeting organizer will be the team (that the added channel belongs to). Therefore, all notification emails are sent to this Teams meeting organizer. If you want to get reservation and order emails for these Teams' meetings, it is important and needed, that you add yourself as an assistant organizer for the meetings, that you are responsible for. Find your Team meetings in the Teams section of the My Meeting application.

No one from the team will receive email notification, but members of the team can see the meeting when they open My Meetings app in Teams.

As an assistant organizer of a meeting, when you select a date on the calendar, all meetings on that date will be displayed on the right side of the panel.

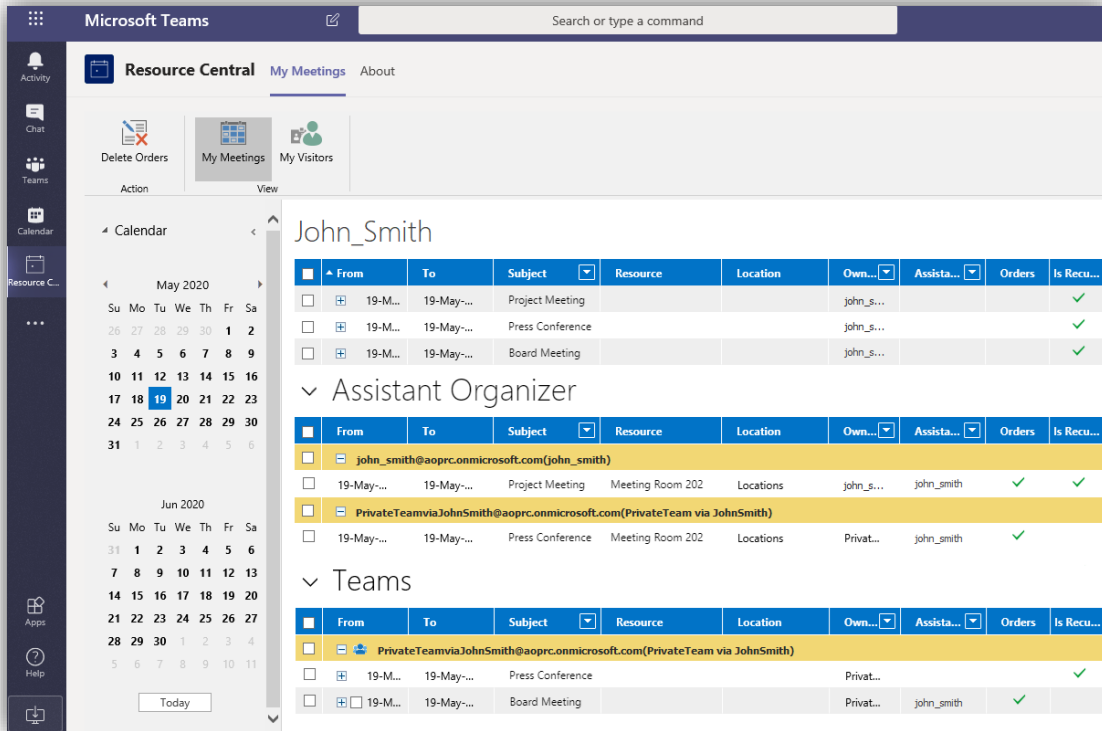


Figure 16. My Meetings in Teams

The first section (with your name as the heading) shows all meetings where you are organizer. The **Assistant Organizer** section shows all meetings where your role is Assistant Organizer. The **Teams** section shows all meetings booked via Microsoft Teams.

**NOTE:** Only teams enabled in **Settings**→ **Teams** and have booking data are displayed in **Teams** section.

## CHAPTER 6.

# Appendix

## Assistant Organizer

In order to enable other organizers like secretaries or Personal Assistants to book meetings and place orders in RC on behalf of other organizers, Resource Central provides the feature “**Assistant Organizer**”.

The feature allows the organizer to assign all related work to the assistant as the notifications can be directed directly to the assistant who will correspond with the different service providers on the different service orders.

The assistant with access to the organizer’s calendar can also schedule the meeting directly in the organizer’s calendar and assign all notifications to the assistant.

### Enabling the feature in Resource Finder

If this function is enabled by the parameter, the icon Assistant is not available in the **ResourceFinder** → **Order Form**. It is only available after the function is enabled in ResourceFinder settings/**Assistant organizer**:

When this function is enabled in the system, the icon Assistant needs to be activated in the ResourceFinder settings/**Assistant organizer**.

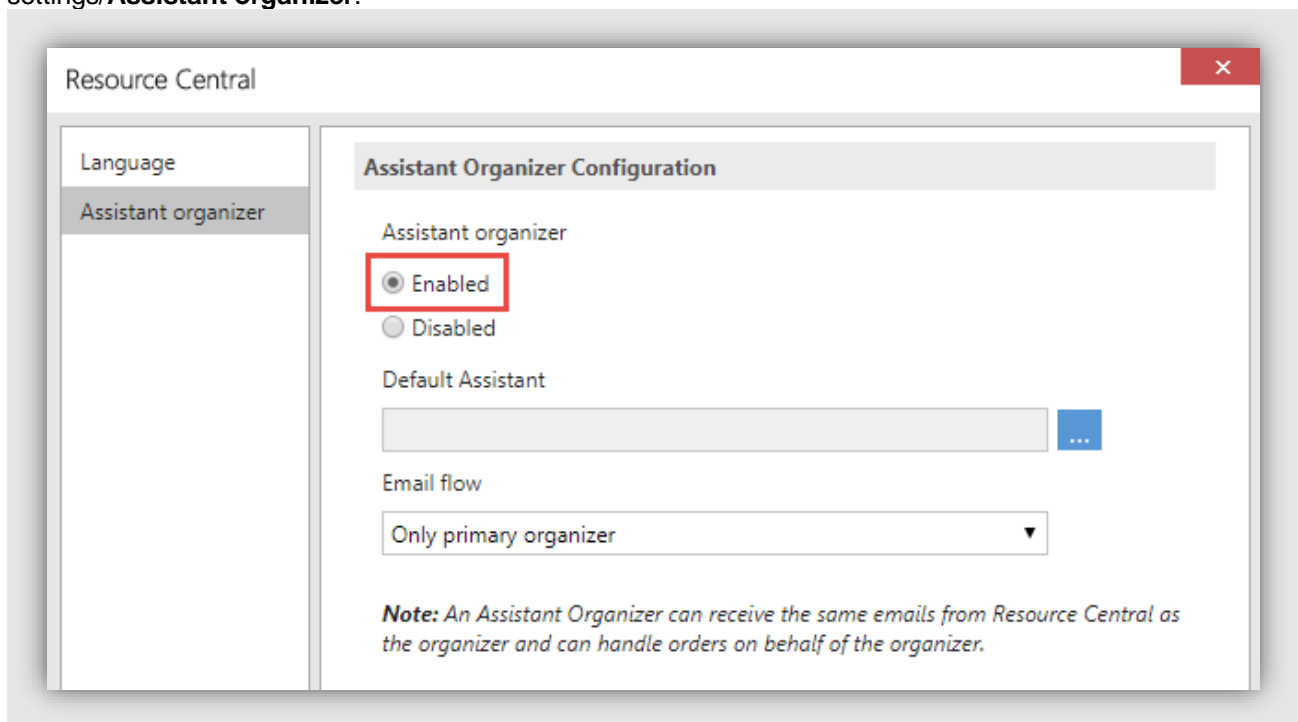


Figure 17. RF Settings – Assistant Organizer

Under Default Assistant, you can setup an assistant organizer that will be used as standard on all your orders. E.g. if all your meetings are always handled by the same assistant.

Click on the [...] button to select default Assistant.

You can also set up a default email flow (who will receive notification emails) by selecting from the drop down list:

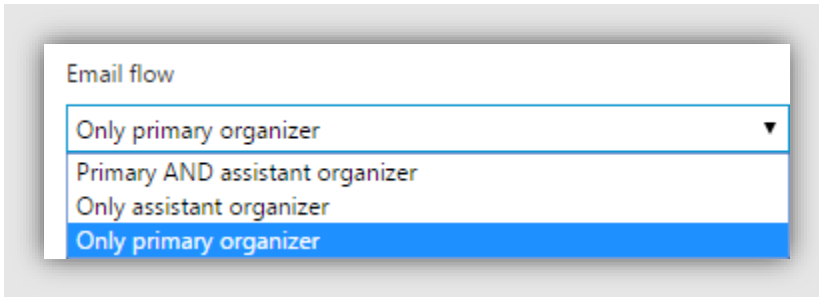
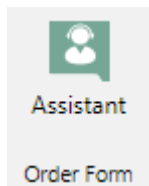


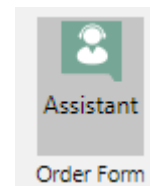
Figure 18. Email flow setup

After clicking [OK], the icon **Assistant** is available in **ResourceFinder** → **Order Form**. But it is only applied to the booking if you click on it

*Disabled Assistant*



*Enabled Assistant*



Enabling the function will make the assistant organizer available in the **ResourceFinder** → **Order Form**: there will be a section in the order form named **“Meeting Organizer”** on top when you make a booking:

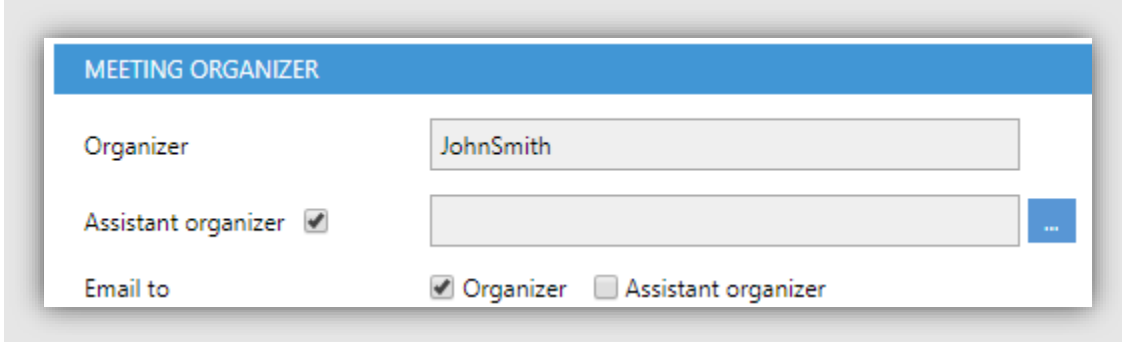


Figure 19. Order Form – Meeting Organizer

The options (assistant and email flow) established previously in **ResourceFinder settings** will be displayed here. You can make change according to any need of the particular meeting or disable it if it is a meeting, where you do not need an assistant organizer.

The function is also available in My Meetings where the organizer can see who the assistant is on different meetings and the assistant can see the meetings of different organizers that the assistant supports.

This is what the primary organizer (in this example, it is John Smith) sees in My Meetings:

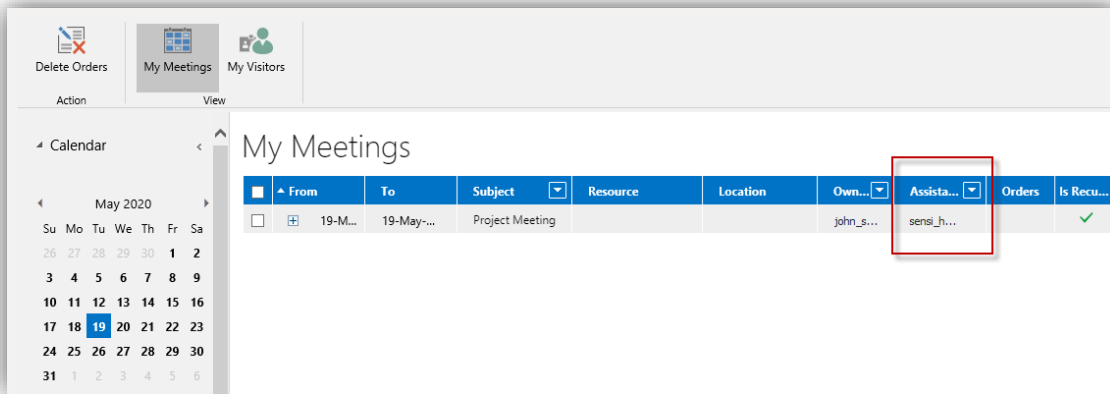


Figure 20. My Meetings opened by Primary Organizer

This is what the assistant organizer (in this example, it is Sensi Haulkner) sees in My Meetings:

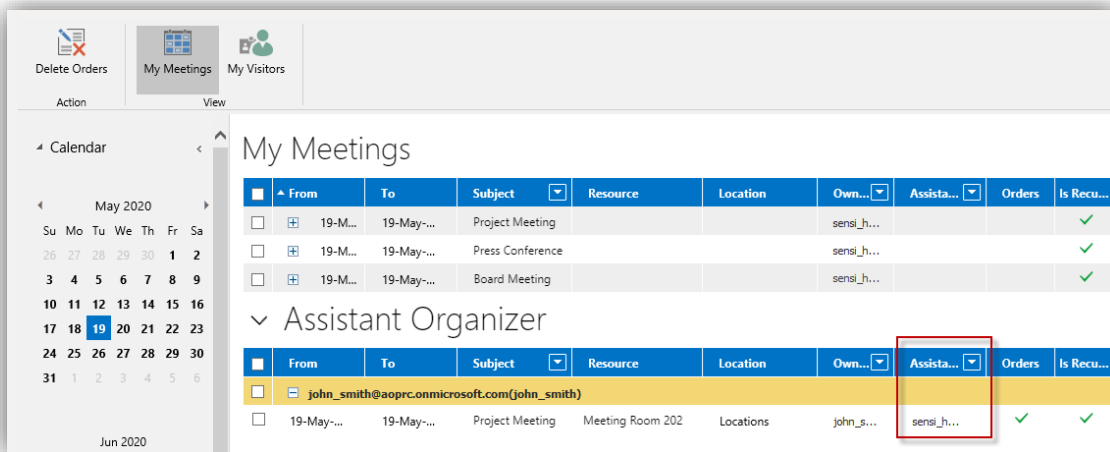


Figure 21. My Meetings opened by Assistant Organizer

In Resource Finder, the assistant organizer will show on other reservations as well. The information is displayed as in the figure below:

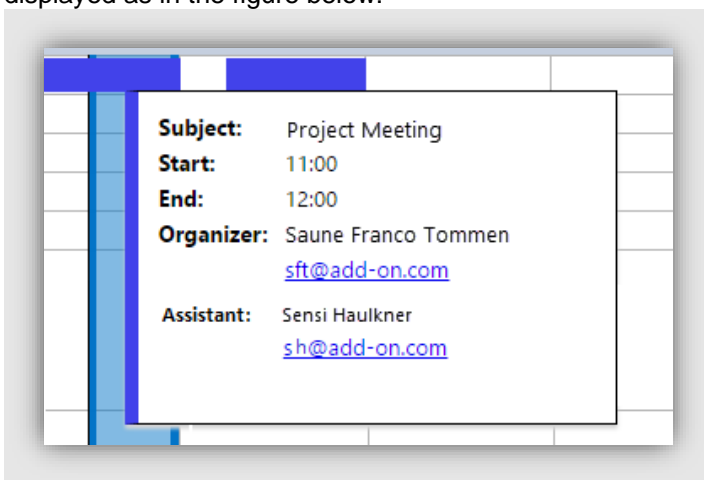


Figure 22. Resource Overview – Booking details