Add-On Products

Resource Central

Service Provider Guide

For RC 4.2

Document Revision 03

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

Foreword

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

Table of contents

CHAPTER 1.

Login for service provider

Service provider users login to the Resource Central Admin interface to perform administration tasks according to their access permissions. Their tasks may include, but are not limited to the following:

- Track / overview meeting activities created by meeting organizers
- Generate and print out reports, orders or reservations
- Respond to orders from users or send information regarding meeting reservations

Login

To login please use the hyper-link which you have received from your IT administration that could look like this: http://Intranet/ResourceCentral/Admin/

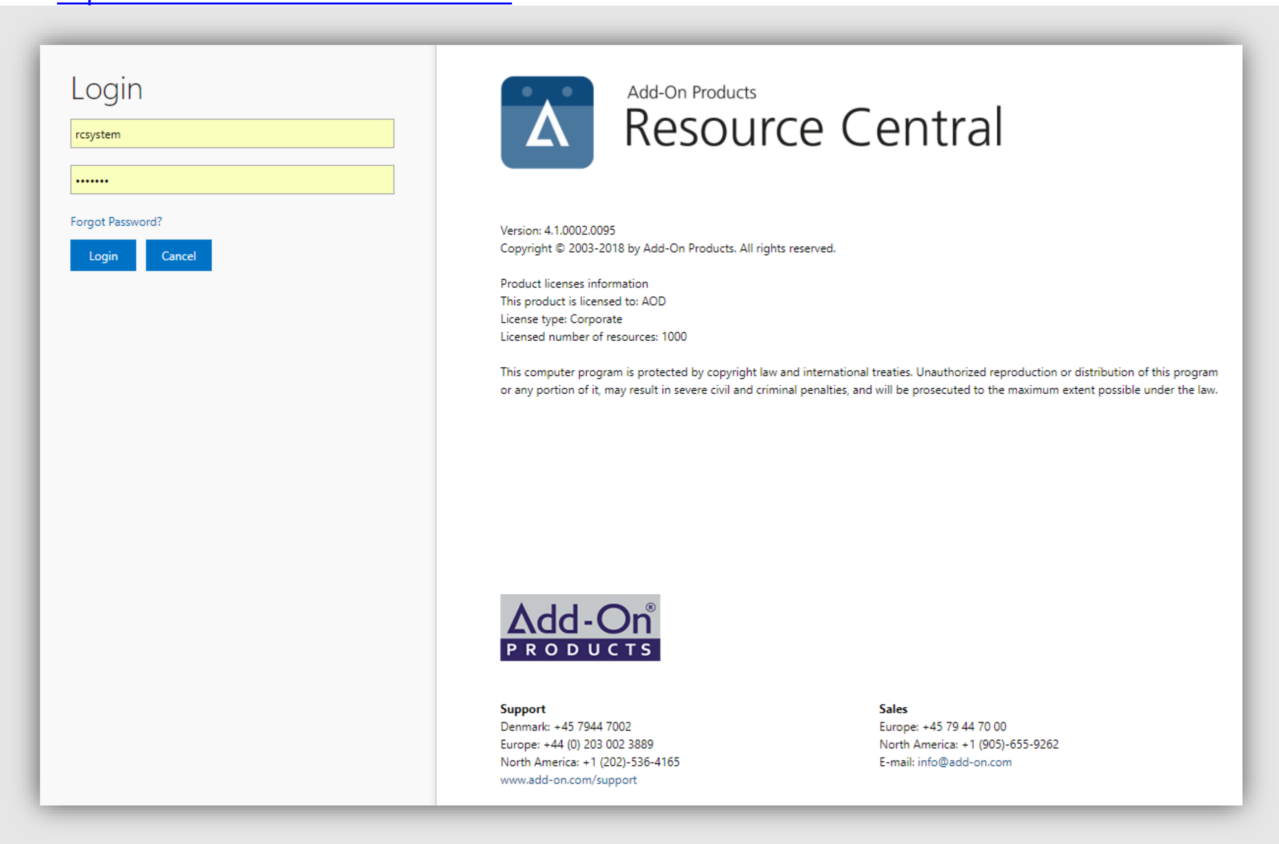


Figure 1. Resource Central Login Page

Fill in your given credentials: user name and password. Then press the **Login** button.

CHAPTER 2.

Daily tasks for Catering Roles

The daily tasks section consists of the following areas:

- Orders – View, print or process orders
- Items – Change or create items

Orders

The order view displays all open orders for the current user logged in for the selected date. The order view is based on the roles defined in Resource Central. This means, that when a person is logged in then this person can only view those Item(s) and properties for which he/she is responsible for. This is determined by the Role(s) this person is associated with.

If no Role(s) are related to a person then this person will not be able to view any orders (records) in this view.

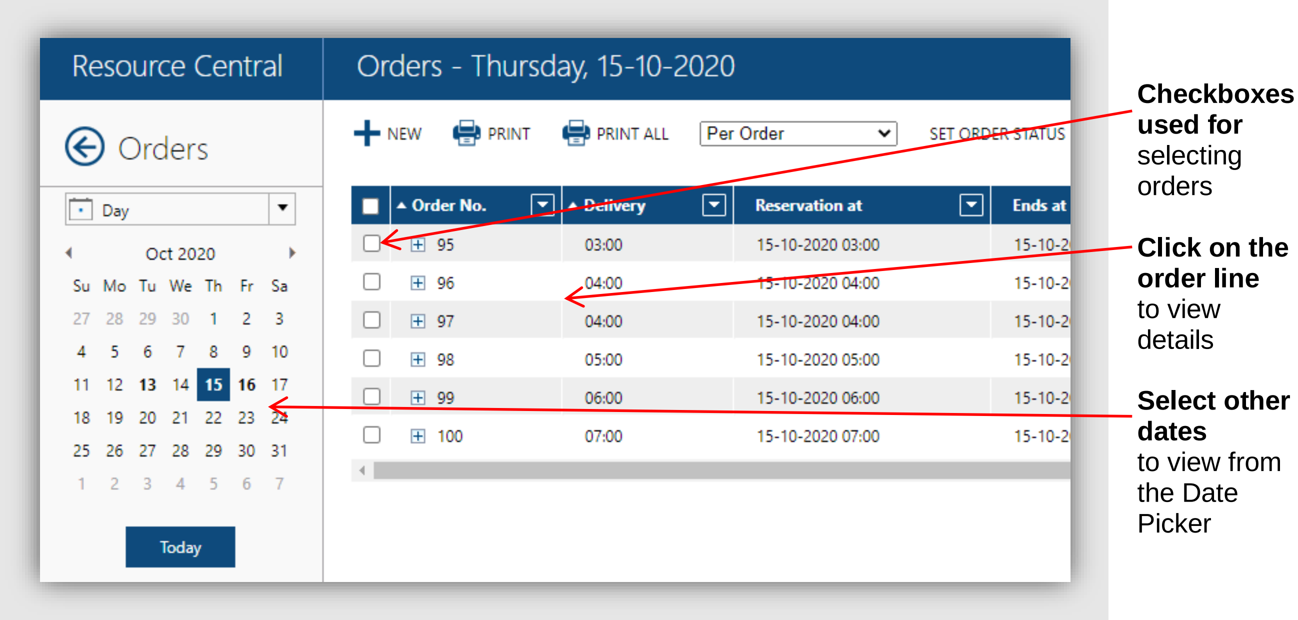


Figure 2. Order List

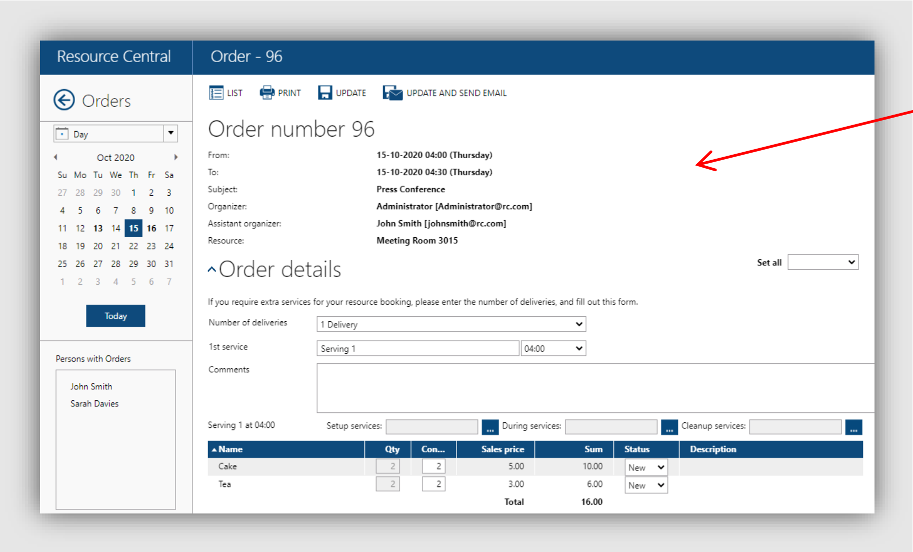
NOTE:

- **Select/De-select All:**

  With help of the master checkboxes, you can select/de-select all the listed entries in a single click

- **Order Number:**

  This column contains the order number of the reservation. The order number will be displayed for all of the servings that have been ordered for a specific reservation



Order details and options

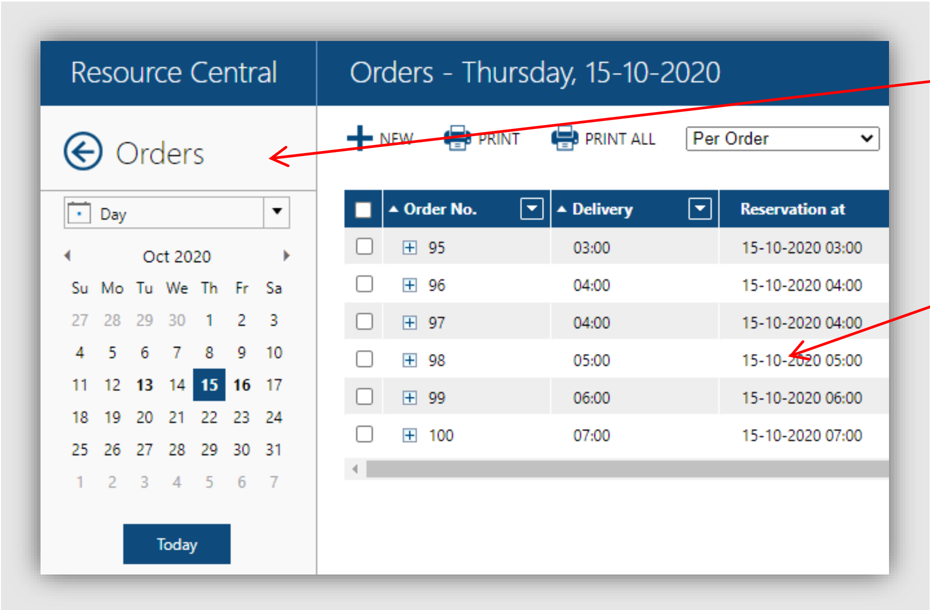
In the order detail view there are options to print, decline or accept an order

If the order is declined or accepted (see toolbar), an email message is sent to the meeting organizer

Figure 3. Order Details and Options

Change an order in Orders

You can use the Orders module to change past and present order quantities. Go to "Orders" in the Daily Tasks pane.



Update order quantities:
Go to the Orders section in the menu

Click on any order in the main window.
The following window will appear.

Figure 4. Messages List

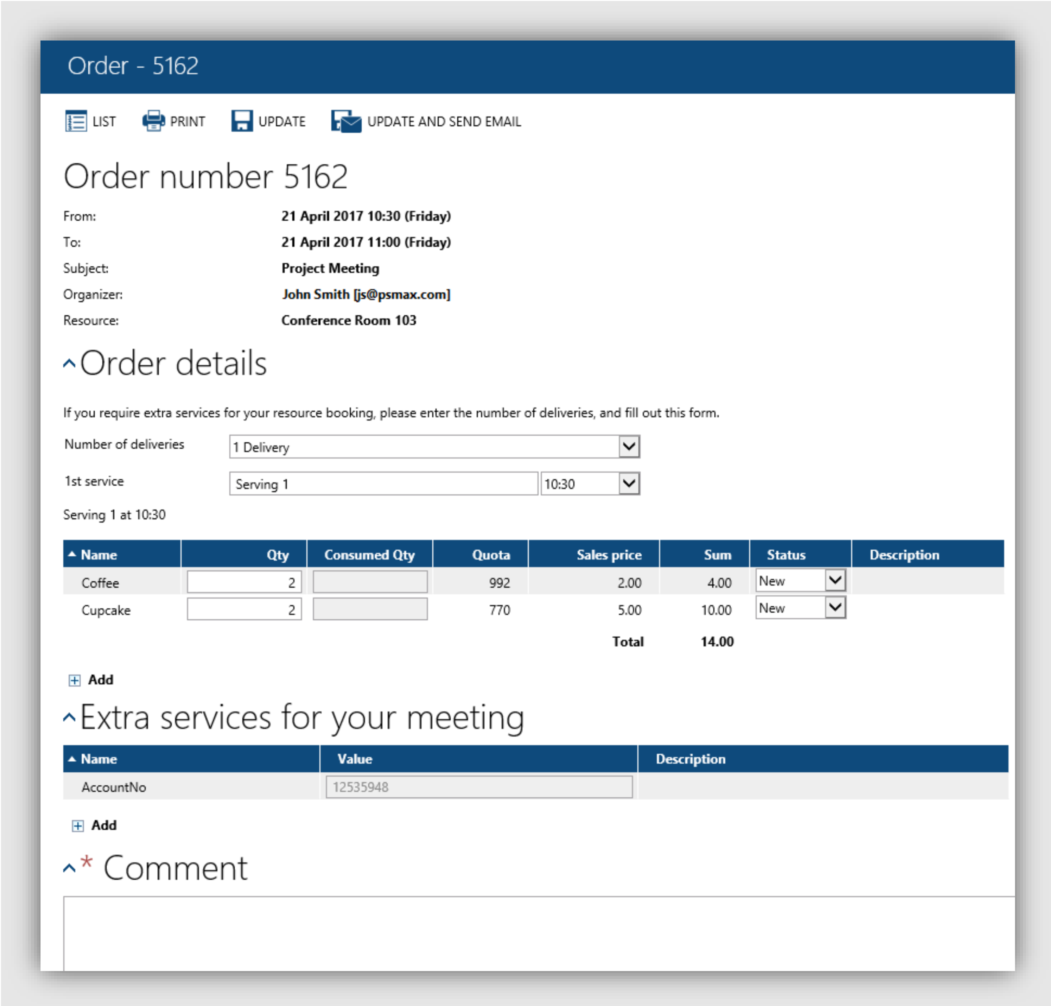


Figure 5. Order Details

Orders – change orders and status

By clicking an order the adjacent window appears.

It will display the full details of the reservation and the order

The following picture will show the possibilities of changing the order

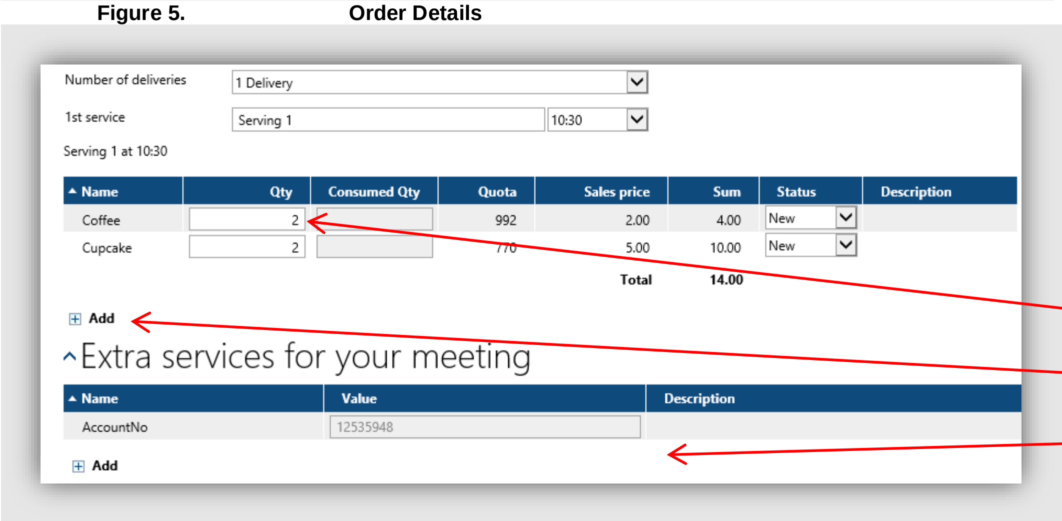


Figure 6. Change Order

Changing Orders:
Here you can change the parts of the order you are responsible for.

- Item quantity
- Add items
- Change the extra services selected.

NOTE: You need to add a Comment / message to the Organizer about the changes you make to complete the changes

The following picture and text will show an example:

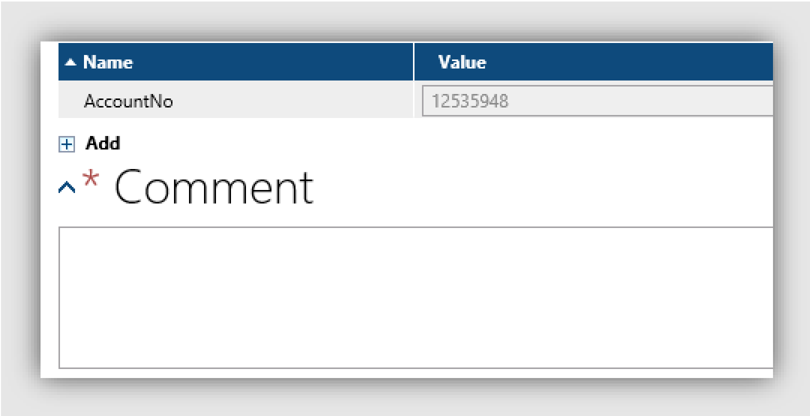


Figure 7. Order Comment

Comment:

Enter a comment which reflects the changes you have made to the order.

No change may take place without sending a reply to the organizer.

Catering staff coordination

In the order details, you can see three fields for you to configure catering staff:

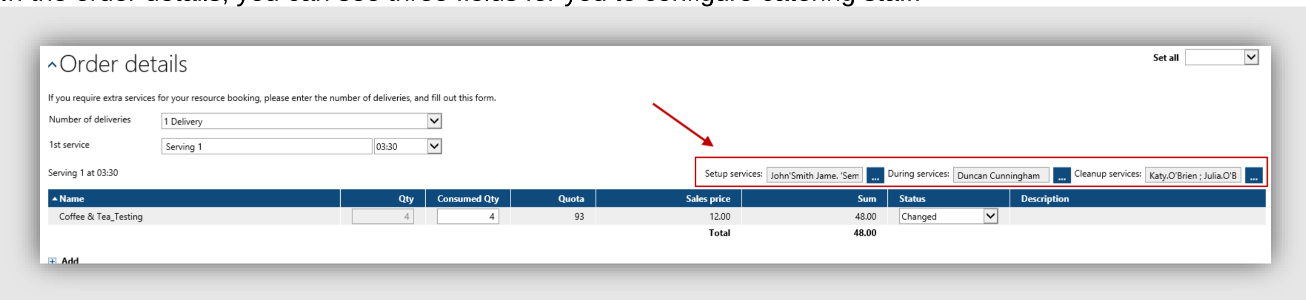


Figure 8. Configure catering staff

You can click on the **[…]** button to select suitable catering staff.

The availability of these fields (**Setup services**, **During services** and **Cleanup services**) is controlled by the parameter **Orders.ShowCateringStaff.** Refer to ***RC Parameter Guide*** for more details.

Order status

Role Type

There are 2 role types that can be set to each Item & Property assigned to a service provider's role: **Assignable** and **Informative**. These role types can be set in **Security → Roles** (refer to Set role type for item and Set role type for property).

'Assignable' role type

A service provider can only handle Items & Properties that have 'Assignable' type related to his/her Role. Also, in an order that affects multiple service providers, each of them can only handle the Order status of Items & Properties that are 'Assignable' to their Role.
(Refers to Order status calculation to understand how the Order status is determined)

NOTE: To be able to set status for Properties, their '**Use status**' setting must be '**Yes**' (refer to **Designer → Properties** for more details).

'Informative' role type

If service provider has Items & Properties with 'Informative' type related to his/her Role, it means that service provider can only see those Items & Properties, but are NOT allowed to handle them.
Also, the 'Informative' items & properties will not affect the Order status shown for individual service provider.

When an organizer orders a catering item in an order form, this item will change its status during the process from the ordering time until it is delivered and perhaps paid for. Most of this happens behind the scenes and automatically. The status can have five (5) different modes:

- New
- Confirmed
- Changed
- Arranged
- Locked

Each status will be explained in the following.

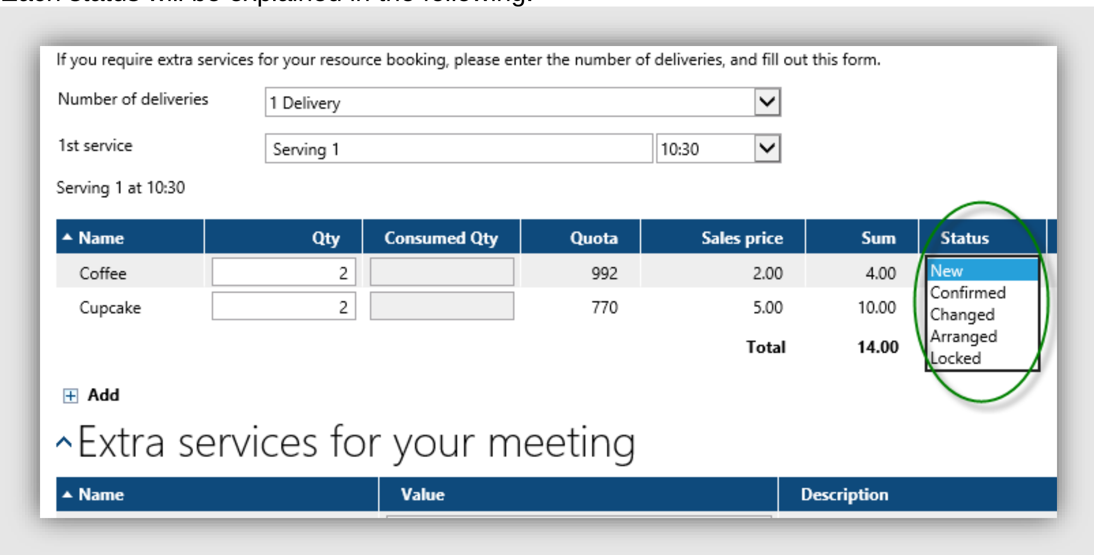


Figure 9. Order Status

‘New’ status

When a new order is created by a meeting organizer, all of its items will get the status ‘**New**’. This status is visible in the backend interface and in the email sent to the organizer.

‘Confirmed’ status

The Service Provider who is responsible for the individual item can change the status of each item to **Confirmed** by selecting the **Confirmed** status on the order form. When the status is changed an email will be sent to the meeting organizer as confirmation of the change.

‘Changed’ status

The status **Changed** can be applied to an item in the following cases:

- If the Service Provider responsible for the item applies the status ‘Changed’ to an item.
- If the Service Provider responsible for an item or the meeting organizer changes the quantity for an item on an order.

If the meeting organizer or the Service Provider responsible for an item changes the quantity of an item on an order form, then Resource Central will automatically notify the other part of the change via email.

‘Declined’ status

If the Service Provider responsible for an item changes the ordered quantity to ‘**0**’ or blank, the status **Declined** is applied to the item. This also results in Resource Central notifying the meeting organizer by email.

If an item has the '**Declined'** status then its price is deducted from the **Catering Totals**.

'Arranged' status

The status **Arranged** can be applied to an order item by the Service Provider who is responsible for the item. It can be a good way to tell the meeting organizer that everything is prepared. By selecting this status the meeting organizer will receive a notification email of the change.

Note: If this status is selected, Quantities cannot be changed by any Service Provider.

'Locked' status

The status **Locked** can be applied automatically or manually - here are the different scenarios where an item can receive this status:

- The status **Locked** can manually be applied to an item by the Service Provider responsible for the item.
- When the Service Provider responsible for the item applies the status **Arranged** then the next time it is opened it will automatically have the status **Locked.**
- If an item has received the status **Locked** then neither Quantity nor Consumed quantity can be modified by the Service Provider responsible for the item or the meeting organizer.

Setting a status for All Items

The Service Provider who is responsible for items doesn't need to change the status for each item individually, this can be done per order. This enables the process to be carried out in an easier way.

- In Resource Central, the responsible Service Provider has the option to mark all the items which need to be changed and then apply this status to the group of items at one time.
- The Meeting organizer will receive a notification email once the items change their status.

Order status calculation

In case of individual service provider, each person's Order screens only show status of his/her own assigned items & properties. The Order status is determined by taking on the highest priority level among all assignable items/properties.

The priority levels are listed as follows:

Status	Priority level
New	1
Changed	2
Confirmed	3
Arranged	4
Locked	5
Declined	6
Transferred	7
Deleted	8
Cancelled	9

For example: an order has 3 assignable items, 2 of them are 'Confirmed', 1 of them is 'Changed'

- The order status will become 'Changed' since it has the highest priority among the 3 included items.

Also as mentioned, items & properties with 'Informative' role type are considered view only. They do not have any effect on the individual's Order status.

Take the same example above: if that order has 1 more informative item with status 'New'.

- The order status is still 'Changed' because informative item does not affect the status. Therefore, order status does not become 'New' despite its higher priority.

Order status alerts configuration

Catering staff needs to be made aware of changes to orders (done by, for example, the organizer). You can configure and display changes of notifications in RC Backend → **Designer** → **Orders**. In this section you can configure notification color for orders, which can be seen in Daily Tasks/Orders.

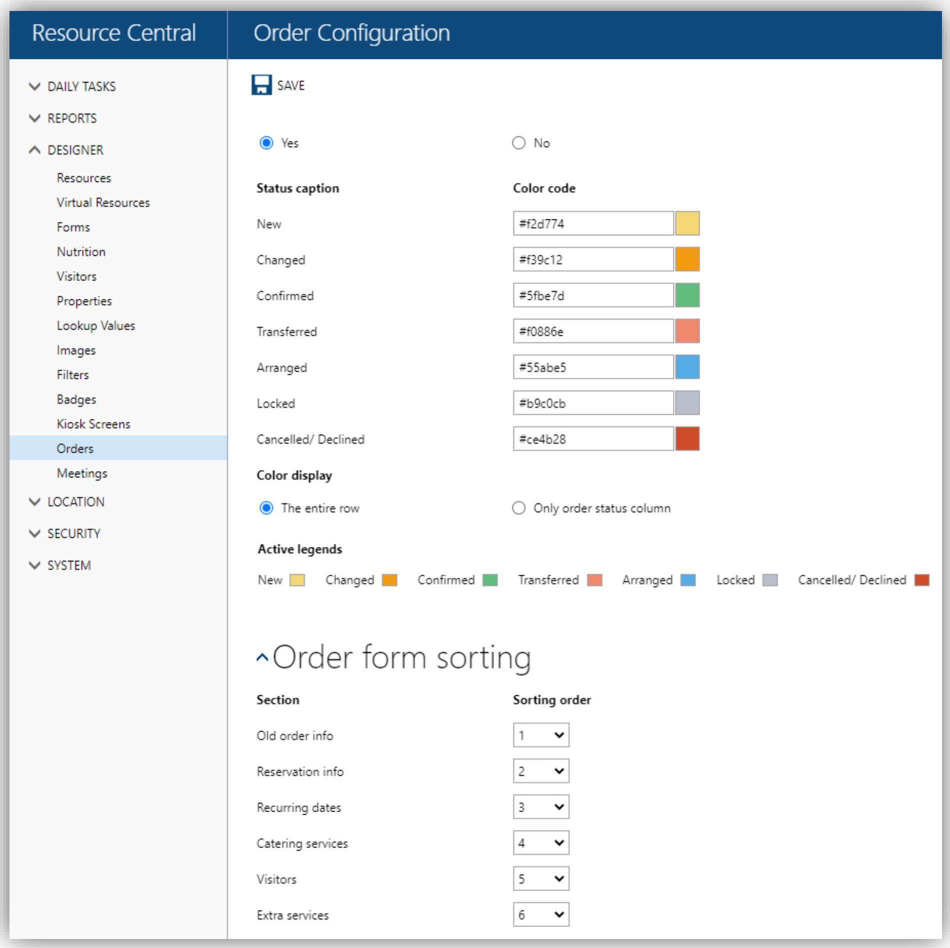


Figure 10. Notification Color configuration

Click on the color next to each label to select the color of your preference. This will be applied when you navigate to Daily Tasks/Orders.

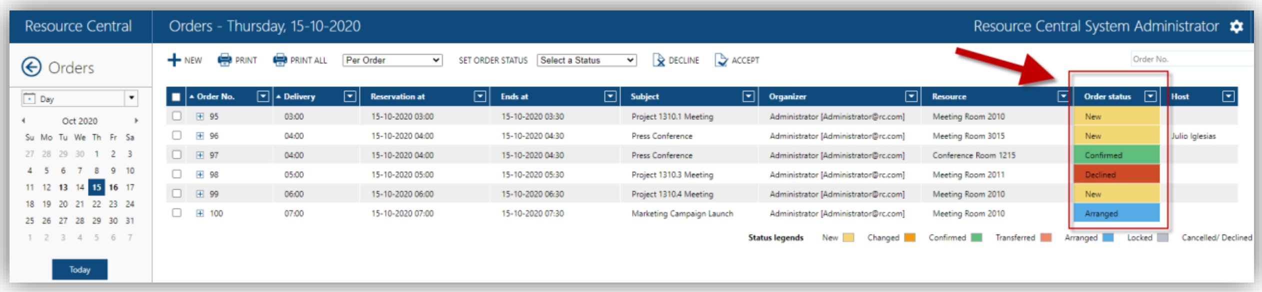
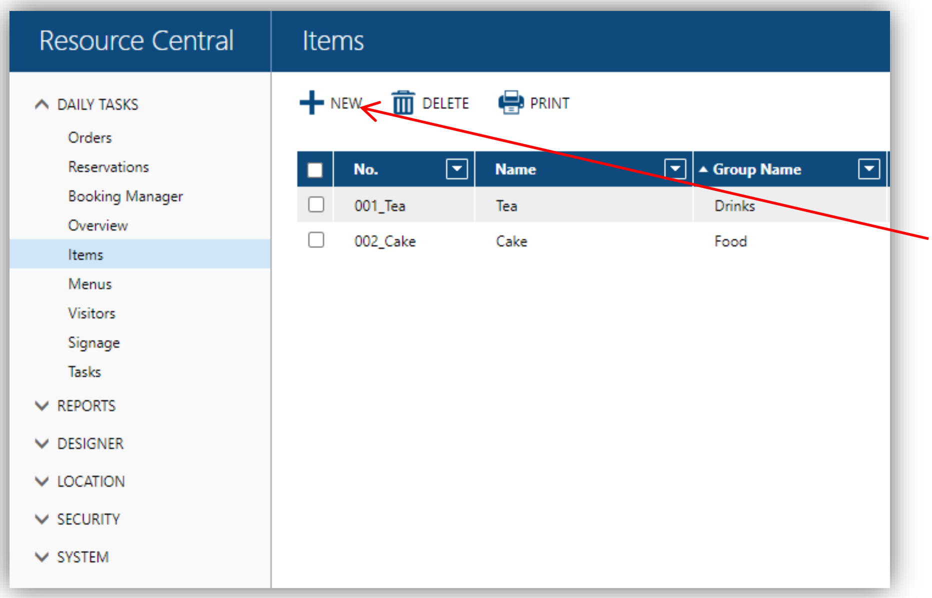


Figure 11. Daily Tasks - Orders

Items

Change or create items

An Item can be ordered in the catering section of the order page in Resource Central. The following describes the usage of items in Resource Central.



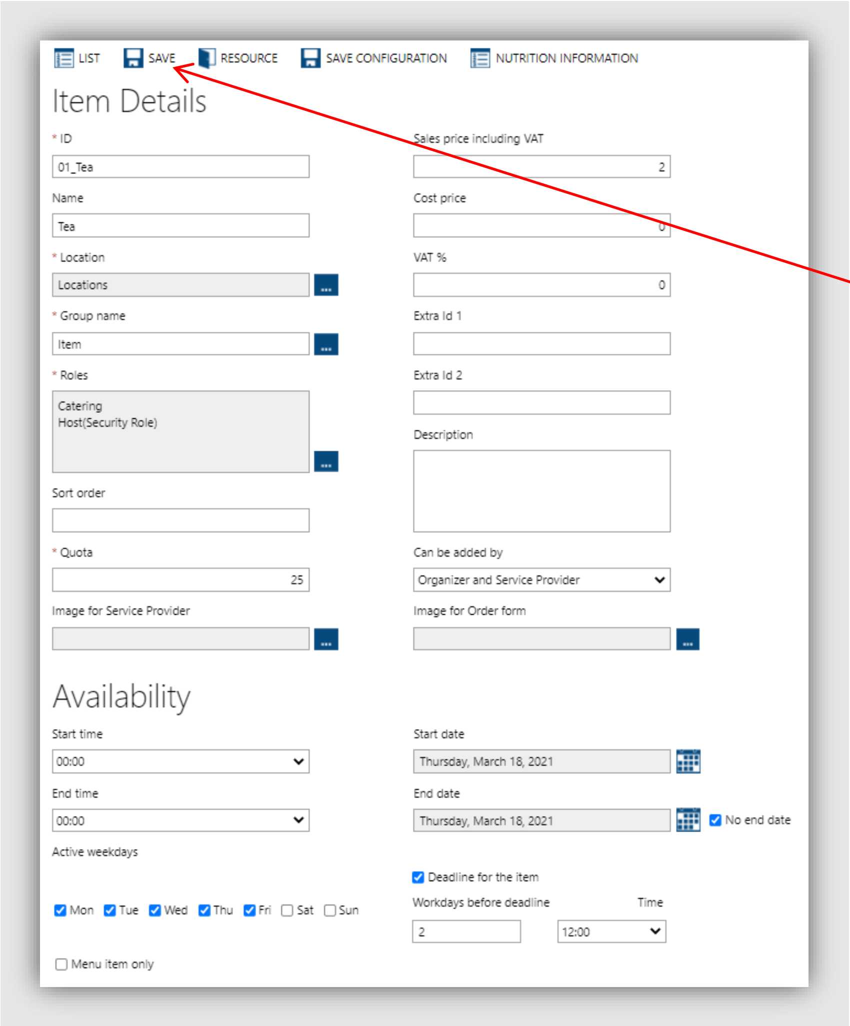
Create new or change an item:

Go back to **Daily Tasks** and select "**Items**" on the pane

Click on "**New**" to create a new item

The following window will appear

Figure 12. Items List



Fill in all information fields with the appropriate data

Examples are displayed and all fields are explained in the following section.

Press **Save** when you are done

Figure 13. Items Details

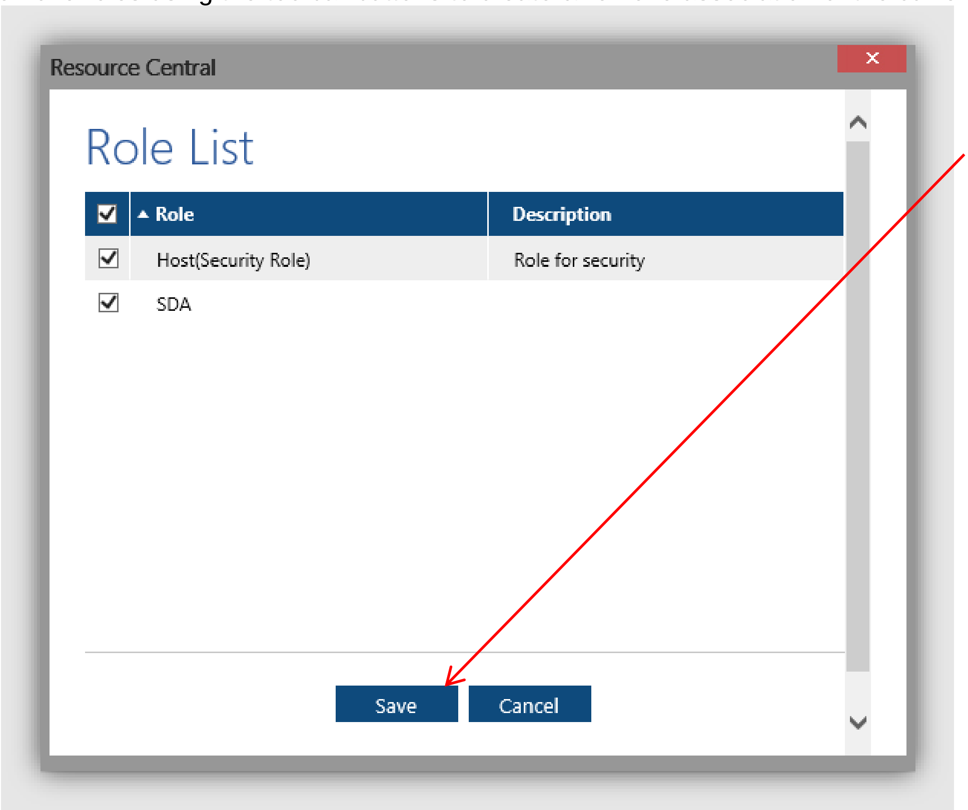
Field	Description
Number	A code for identifying the record.
Name	The text presented to the meeting organizer when being asked for this item.
Location	Select the location of item (mandatory) The location must be defined in ‘**Locations**’ tree under Location node.
Group Name	Group Name can be used for categorizing the items.
Role Name	Role link to this item
Description	A short description.
Sort Order	Sort order can hold any alphanumeric values and are used for sorting items.
Sales Price	Sales price is the price of the item. A value **0** indicates that no calculation should be made.
Cost Price	Cost price of the item. A value **0** indicates that no calculation should be made.
Extra ID 1 and 2	Fill in alphanumeric data. These 2 fields serve retrieving results for a custom report

Quota	The maximum number of items could be ordered a day. For detailed information on this feature, refer to the **Error! Reference source not found.** section in this guide.
Can be added by	Select the person(s) who can add this item
Start date & End date	Time range established to define availability period of the item
Start time & End time	
Active weekdays	
Deadline for the item	Enable deadline for booking the current item
Workdays before deadline & Time	Time range established to define deadline to book the item
Image for Service Provider	Select image to be used in customized reports for Service Provider
Image for Order Form	Select image to be used in the order form
Menu item only	Check on this to prevent organizer from booking the current item as a single item. It must be booked along with the menu to which it belongs.

Add a Role to an item

The description of a Role can best be defined as all the different service functions which provide services to meetings. As an example it could be a person who is responsible for the Cantina at a specific location or an IT person who is responsible for setting up IT equipment at a location.

Clicking [**Roles**] in the details page, all the roles related to the selected item are displayed. You can add & remove roles using the toolbar buttons to create & remove association of the current item with specific roles.



Once changes to the roles related to an item have been finalized, please click on the **[Save]** button and then click save in the next window.

Figure 14. Active Roles for Item

Set role type for item

If a Role is a security role (refer to Administrator Guide), you can set role type for each item assigned to that specific Role.
To do this, go to **Security → Roles**, select a Role then click [**Items**]. Here you can add items and set role type as '**Assignable**' or '**Informative**' for each item. You can also set role type in bulk by selecting multiple items (marking the checkbox) and use [**Set Role Type**].
To delete item(s), select the item(s) and click [**Delete**]. Click [**Role**] to go back to **Role detail view**.

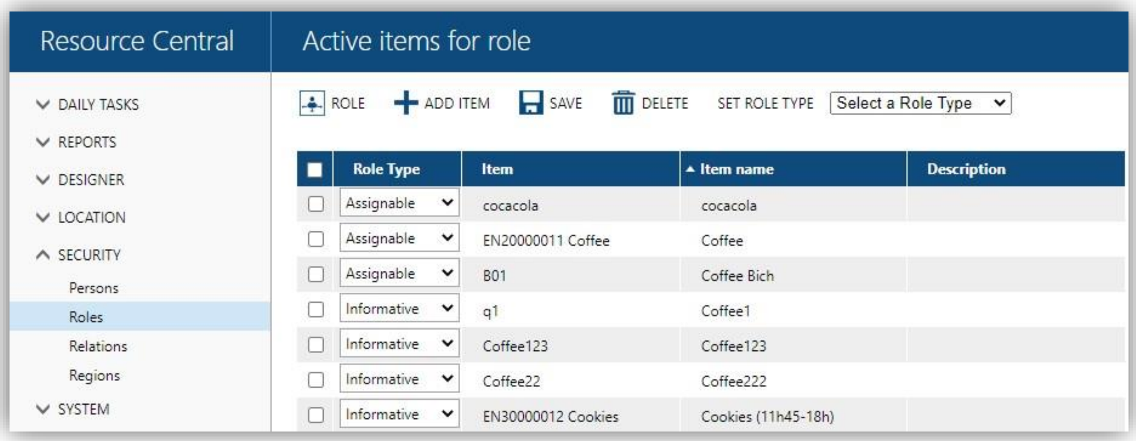


Figure 15. Items assigned to a Role

Toolbar Buttons	**Description**
ROLE	Take you back to the Role Details
ADD ITEM	Add an item from the list of all the items
SAVE	Save changes that have been made
DELETE	Remove the selected items
SET ROLE TYPE	Change role type in bulk when you select multiple items

Set up item selection

You can set up how an item can be booked in details of a resource. This feature is controlled by the parameter **SelectItemOption.Enable**. For more details about this parameter, please refer to ***RC Parameter Guide***.

Go to **RC backend → Designer → Resource**. Open a resource and look at the Order Flow Properties section:

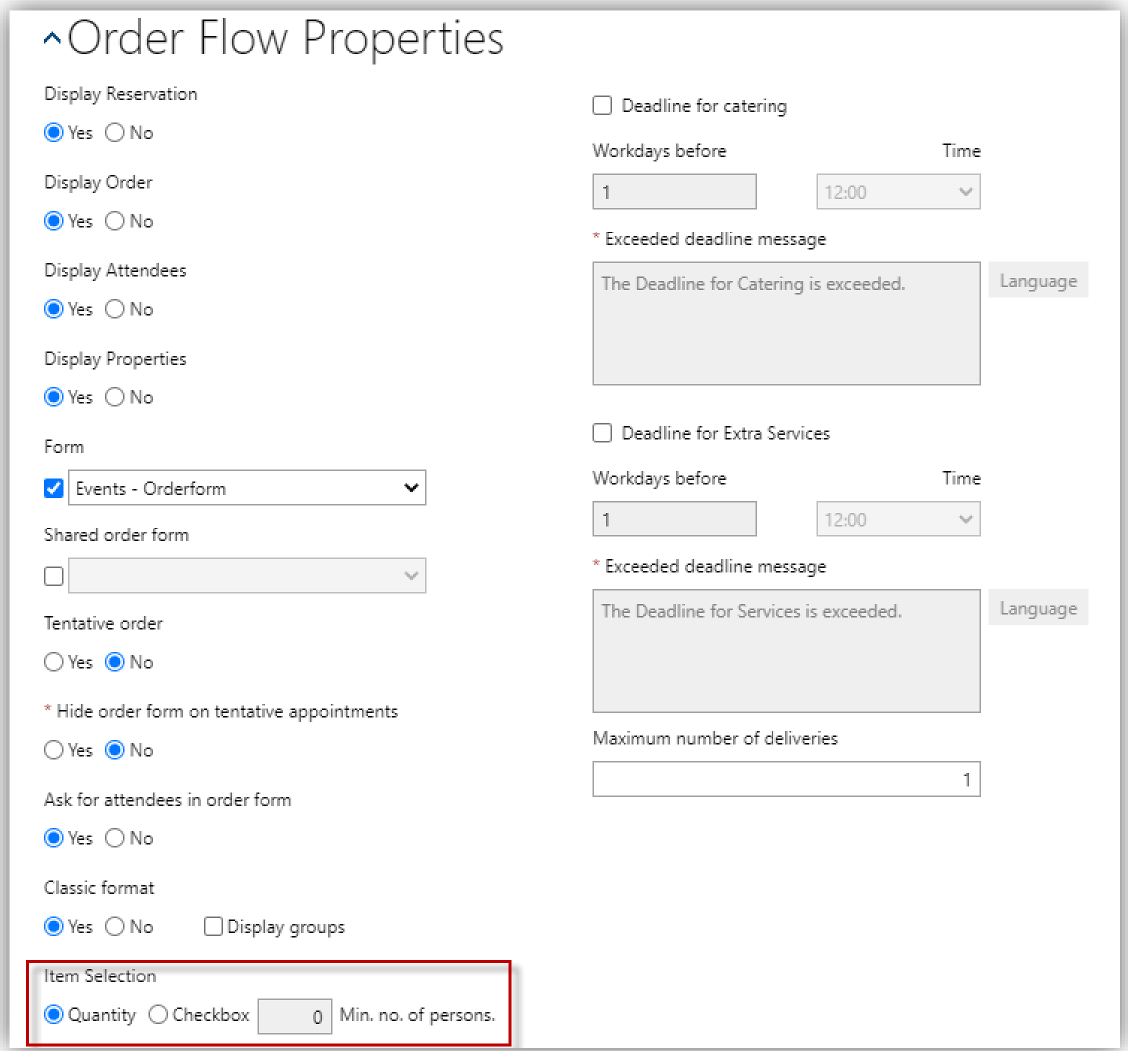


Figure 16. Item Selection in Resource details

Select how items will be displayed for booking:

- **Quantity**: There is a field to enter the required quantity per item in order form.
- **Checkbox**: The ordering in order form will be made by checking the required items. In this case you have to enter Minimum Quantity (Min. qty.) that must be ordered (this is only available when ‘Checkbox’ is selected).

Click [**Save**] to finish.

After this, you can see the effect of this selection in order form:

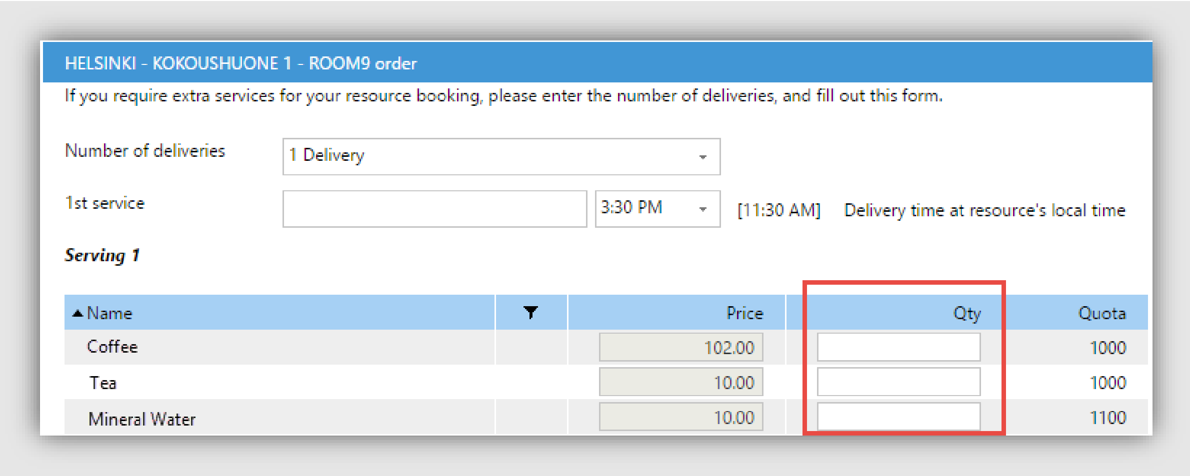


Figure 17. **Item Selection – Quantity**

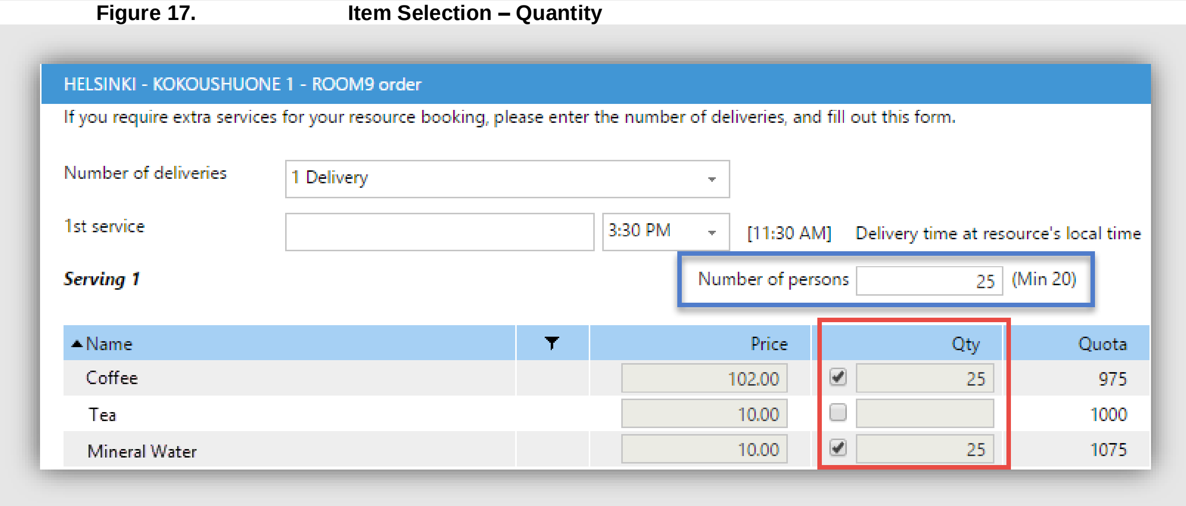
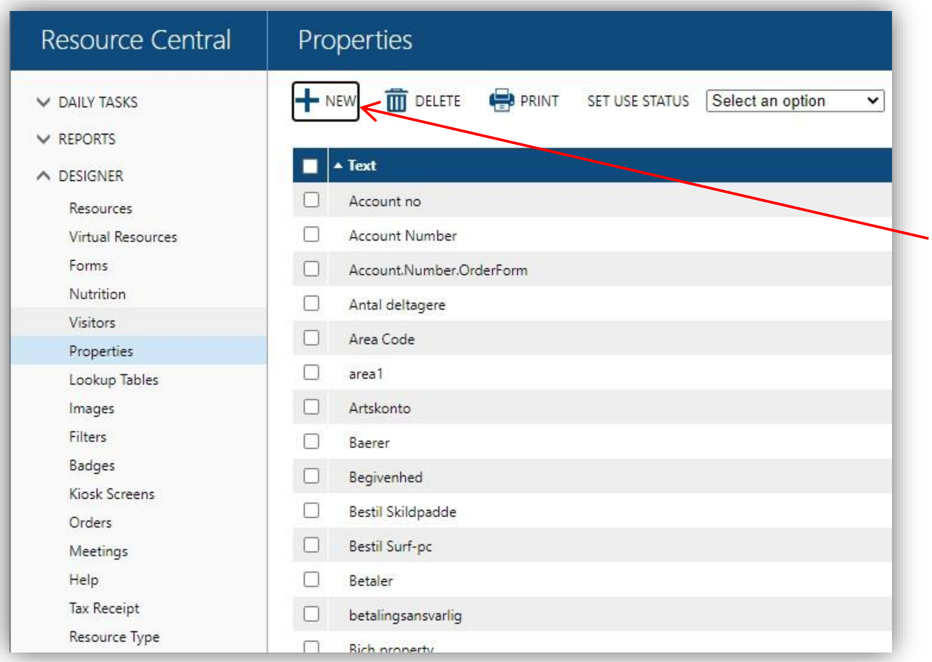


Figure 18. **Item Selection – Checkbox**

Properties

Change or create properties

Certain properties can also be ordered in the catering section of the order page in Resource Central. The following describes the usage of properties in Resource Central.



Create new or change a property:

Go to **Designer → Properties**

Click on “**New**” to create a new property

The following window will appear

Figure 19. Properties List

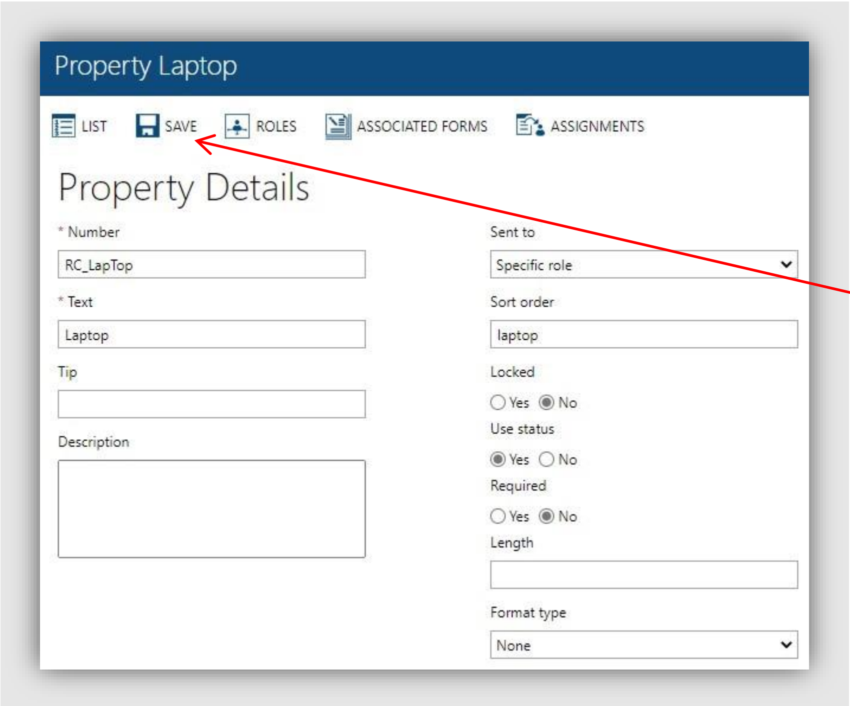


Figure 20. Property Details

Fill in all information fields with the appropriate data

Examples are displayed and all fields are explained in the following section.

Press **Save** when you are done

Field	Description
Number	Name of the property. This value can be used in your **customized** order form. It should be **unique.**
Text	The "**friendly**" name of the property. This value is used when you insert a field on a sub form and is also used in the order confirmation email
Tip	Value of this field is content of the **tooltip** which will appear when user rolls the mouse over the field associated with this property on the Order Form
Description	A short description. Max **255** characters
Sent to	Controls who will receive this information: • **All:** Property will be visible in the order form to all persons related to the order. • **Specific role:** Property will be visible in order form only to roles associated with the property. **None:** Property will not be visible to anyone.
Sort Order	Sort order can hold any **alphanumeric** values and can be used for sorting the properties
Locked	If you select "**Yes**", then the responsible role (s) of this property will not be allowed to make any changes to the value of this property, as this property will appear as Disabled at the corresponding interfaces

Use status	Determine whether this property can be set status in the Order or not. • If Yes: the property can now be set with a status in the Order. Also, it will affect Order status calculation. • If No: the property cannot be set with a status, and it does not affect Order status. You initially need to consider how you have structured or want to structure your services, and how you want to be able to approve their ordering. E.g., you might want to confirm the ordered table arrangement service, but not confirm the cost code. In this case, you would set the Cost Code property to not use the status.
Required	If you select "**Yes**", you can specify a message which will be displayed to the user when the property is not filled out on the order form
Length	Maximum number of characters that can be entered as value of this property
Format type	Select a format for value of this property. • **None**: Value with all format types is accepted. • **Text**: Entered value must be text (e.g., ‘car’, ‘bike’) • **Date**: Entered value must be date format (e.g., 15/04/2020) • **Number**: Entered value must be digits (e.g., 25464) • **E-mail**: Entered value must be email address (e.g., johndoe@hotmail.com) **Special**: Entered value must be a sequence of characters that forms a search pattern following Regular expression definition (e.g., x{5}-g{6})

Add a Role to a property

The description of a Property can best be defined as all the different service functions which provide services to meetings. As an example, it could be an IT person who is responsible for setting up IT equipment at a location.

Clicking [**Roles**] in a property’s details page, all the roles related to the selected item are displayed. You can click [**Add Role**] to select specific roles then add them to the list. Also, you can select roles on the Active Roles list (Figure 20) and click [**Delete**] to remove those roles.

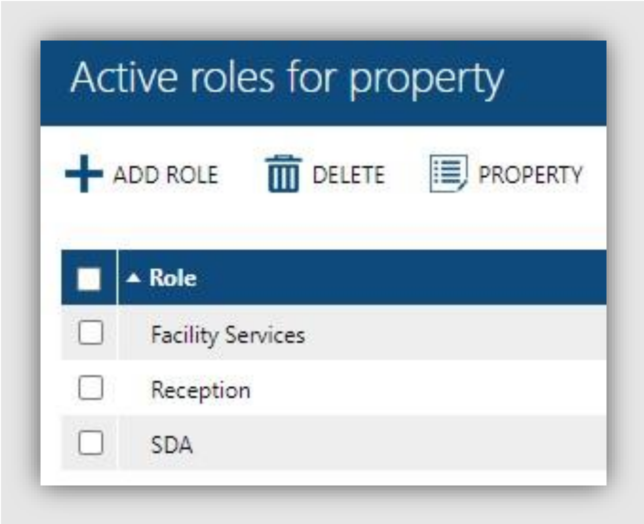


Figure 21. Active Roles for property

Once changes to the roles of a property have been finalized, click **[Property]** to return to property’s details page then click [**Save**].

Set role type for property

If a Role is a security role (refer to Administrator Guide), you can set role type for each property assigned to that specific Role.
To do this, go to **Security → Roles**, select a Role then click [**Properties**]. Here you can add properties and set role type as ‘**Assignable**’ or ‘**Informative**’ for each property. You can also set role type in bulk by selecting multiple items (marking the checkbox) and use [**Set Role Type**].
To delete a property, select the property and click [**Delete**]. Click [**Role**] to go back to **Role detail view**.

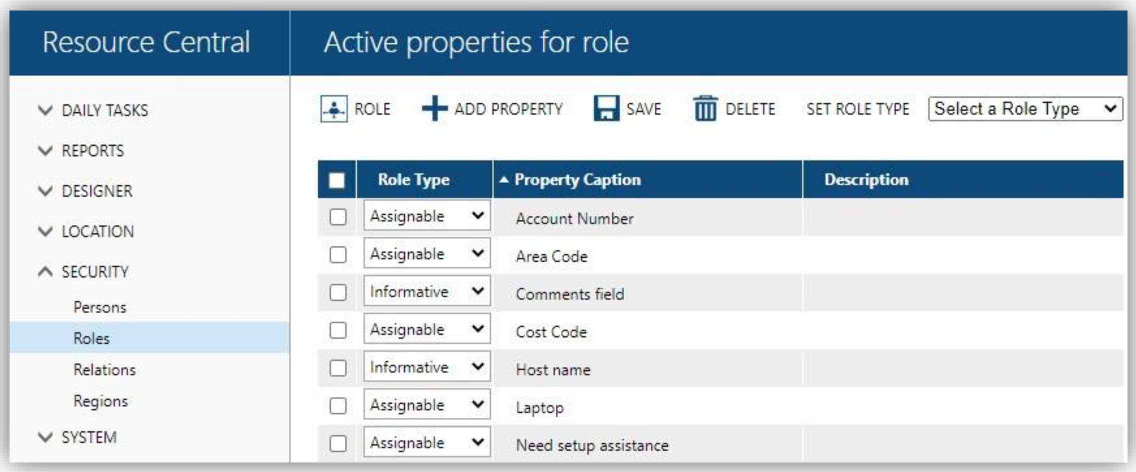


Figure 22. Properties assigned to a Role

Toolbar Buttons	Description
ROLE	Takes you back to the Role Details
ADD PROPERTY	Add a property from the list of all the properties
SAVE	Save changes that have been made
DELETE	Remove the selected properties
SET ROLE TYPE	Change role type in bulk when you select multiple properties

Menu management

Resource Central enables user to create a fixed set of items predefined as menus.

Go to RC backend → **Daily Tasks** → **Menus**. Here you can manage all menus of items.

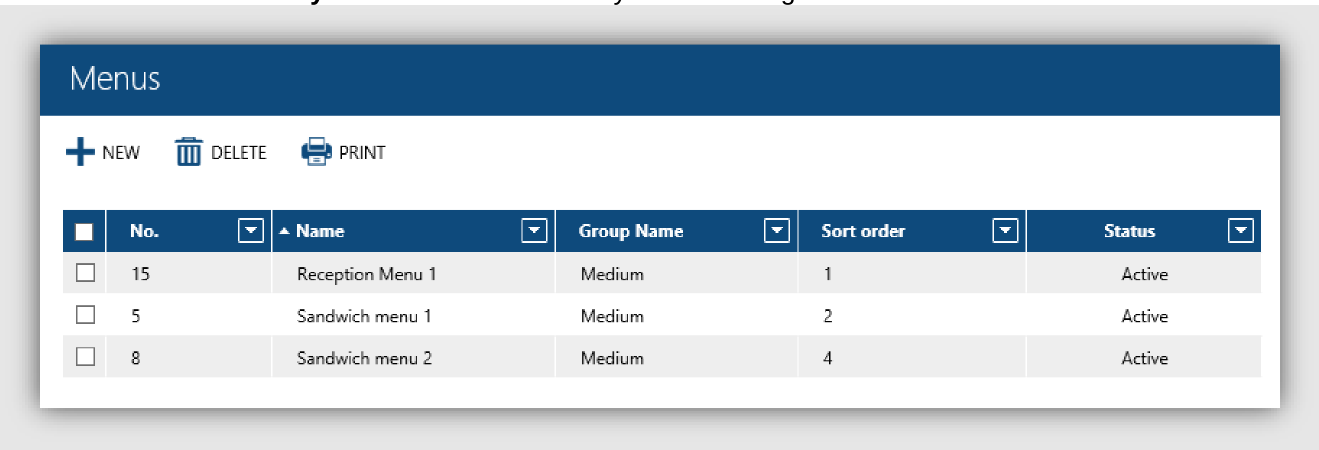


Figure 23. List of menus

Toolbar Buttons	Description
New	Create a new menu
Delete	Delete selected menu(s)
Print	Print the selected menu(s)

Create or edit a menu

Click [**New**] to create a new menu, or click on an existing menu to open its details:

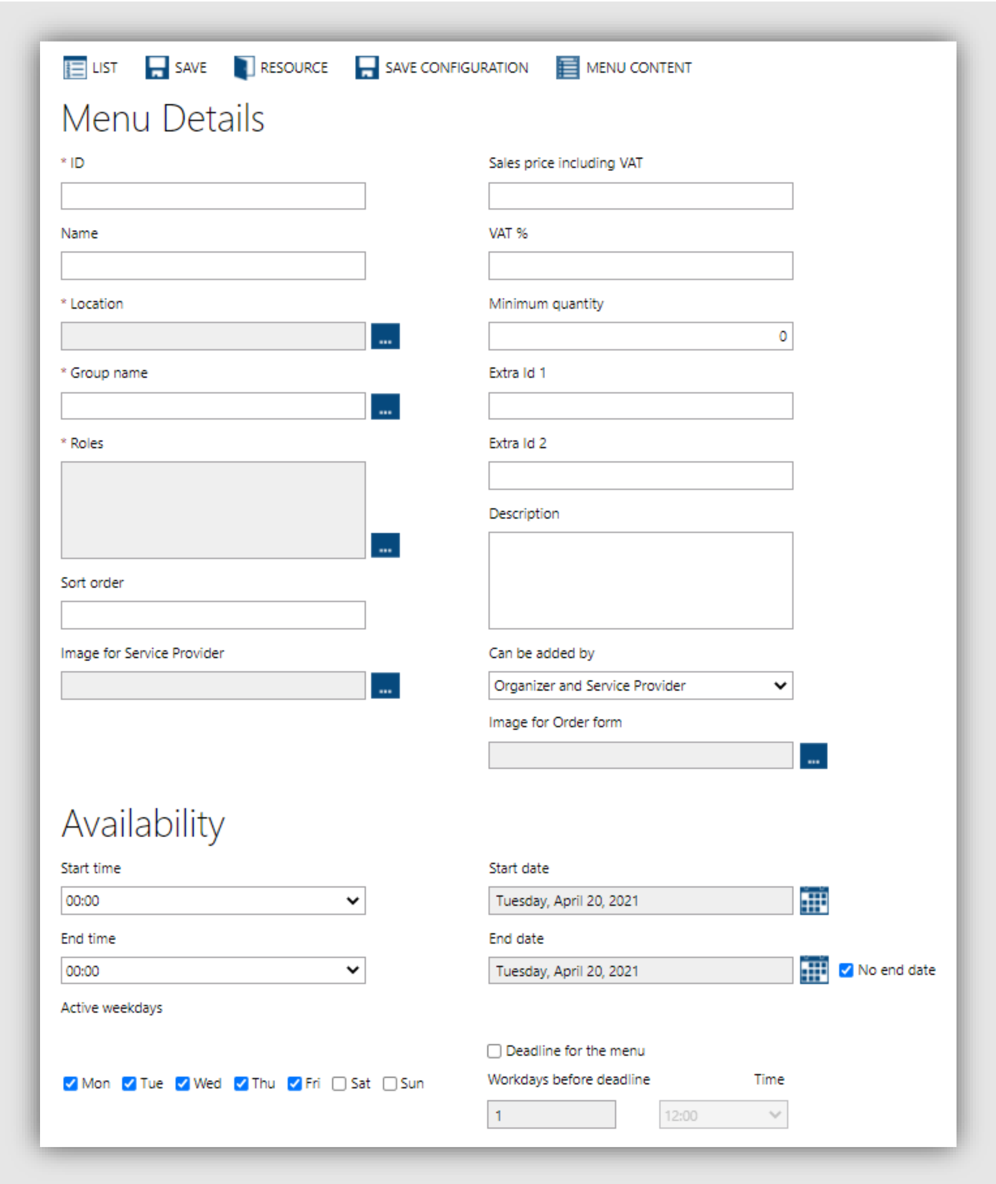


Figure 24. Details of a menu

Field	Description
ID	A code for identifying the record.
Name	The text presented to the meeting organizer when being asked for this item.
Location	Select the location of the menu (mandatory) The location must be defined in '**Locations**' tree under Location node.
Group Name	Group Name can be used for categorizing the items.
Roles	Role link to this menu
Description	A short description.
Sort Order	Sort order can hold any alphanumeric values and are used for sorting items.
Sales Price	Sales price is the price of the item. A value **0** indicates that no calculation should be made.
Minimum quantity	Minimum quantity of this menu that must be ordered
Extra ID 1 and 2	Fill in alphanumeric data. These 2 fields serve retrieving results for a custom report
Description	Description about the menu
Can be added by	Select the person(s) who can add this item
Image for Service Provider	Select image to be used in customized reports for Service Provider
Image for Order Form	Select image to be used in the order form
Start date & End date	Time range established to define availability period of the item
Start time & End time	
Active weekdays	
Deadline for the menu	Enable deadline for booking the current menu
Workdays before deadline & Time	Time range established to define deadline to book the menu

Make any necessary changes and click [**Save**] to finish.

Add items to the menu

Click on [**Menu Content**] to configure the menu. An item can be applied to more than one menu.

Menu items are put into groups. A new group is created with the [**Add**] button and is deleted with the bin.

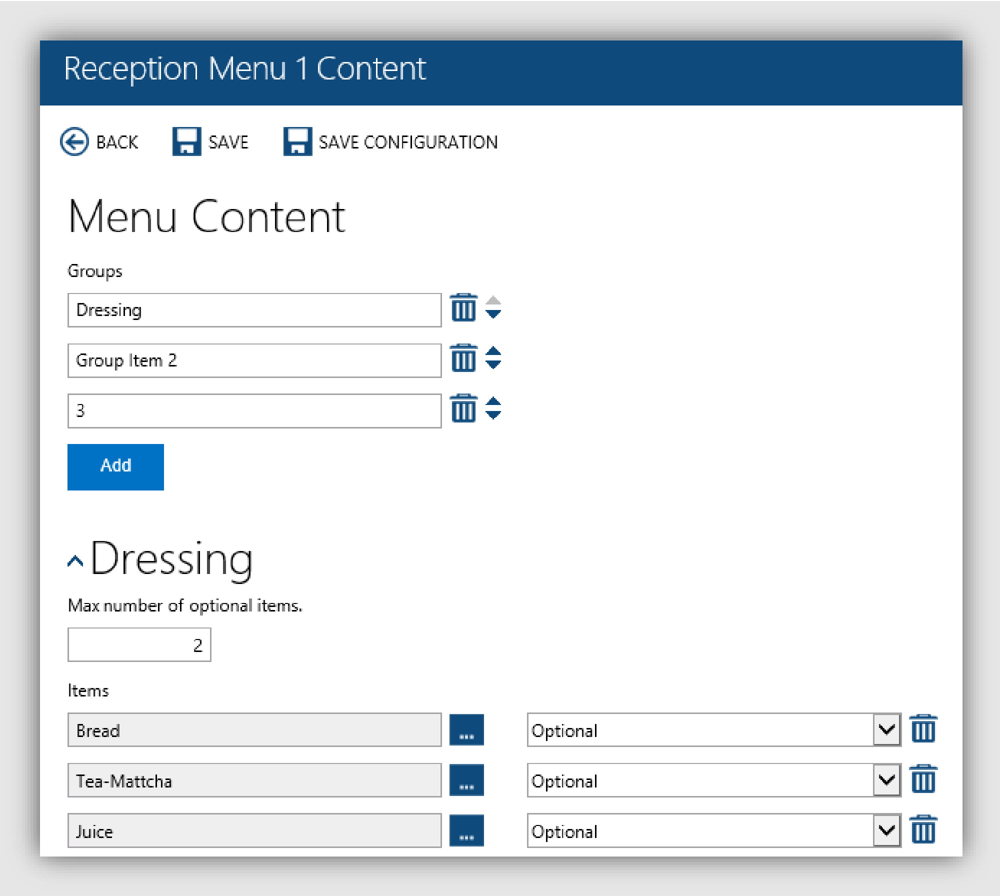


Figure 25. Add items to a menu

When you type the name of item group into the text field under [**Groups**] heading, it will be instantly applied.

Add or remove as many items as you wish to the menu.

Then click [**Save**] to finish.

Nutrition information

It is possible now to add nutrition information on each item to help users make better and informed decision when a booking is made.

Go to RC backend → **Designer** → **Nutrition**. In this section, you can make configuration for adding nutrition information to items in the system.

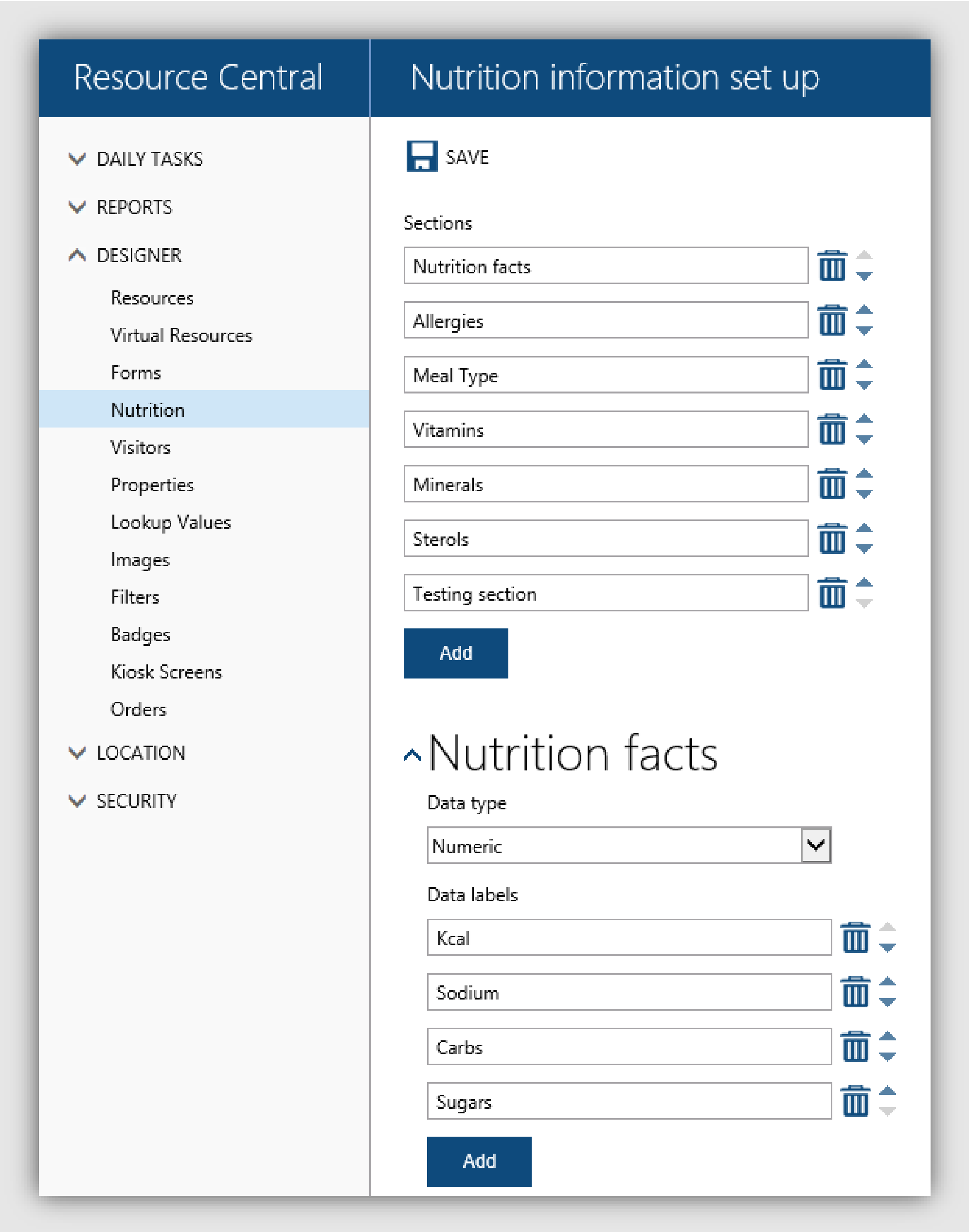


Figure 26. Nutrition configuration

Sections

Number of sections here will be applied to all items. You can add or remove a section with the button [**Add**] or the bin.

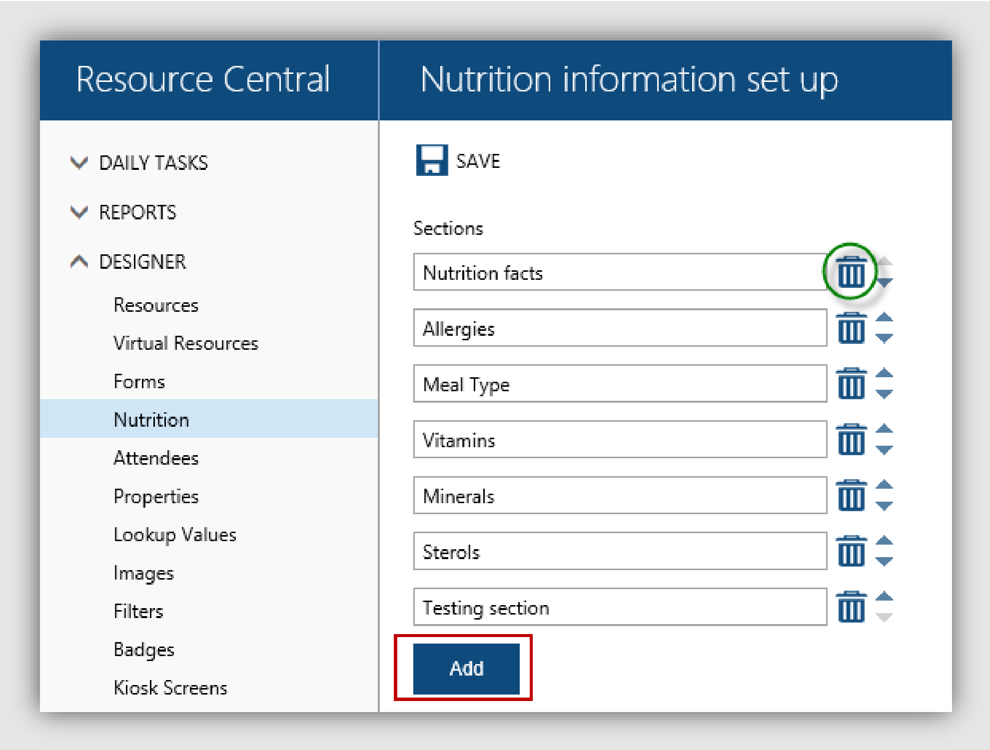


Figure 27. Configure nutrition information for all items

In the above figure, you can see that there are 7 nutrition sections, i.e. these sections will be available in **Nutrition Information** panel of an item.

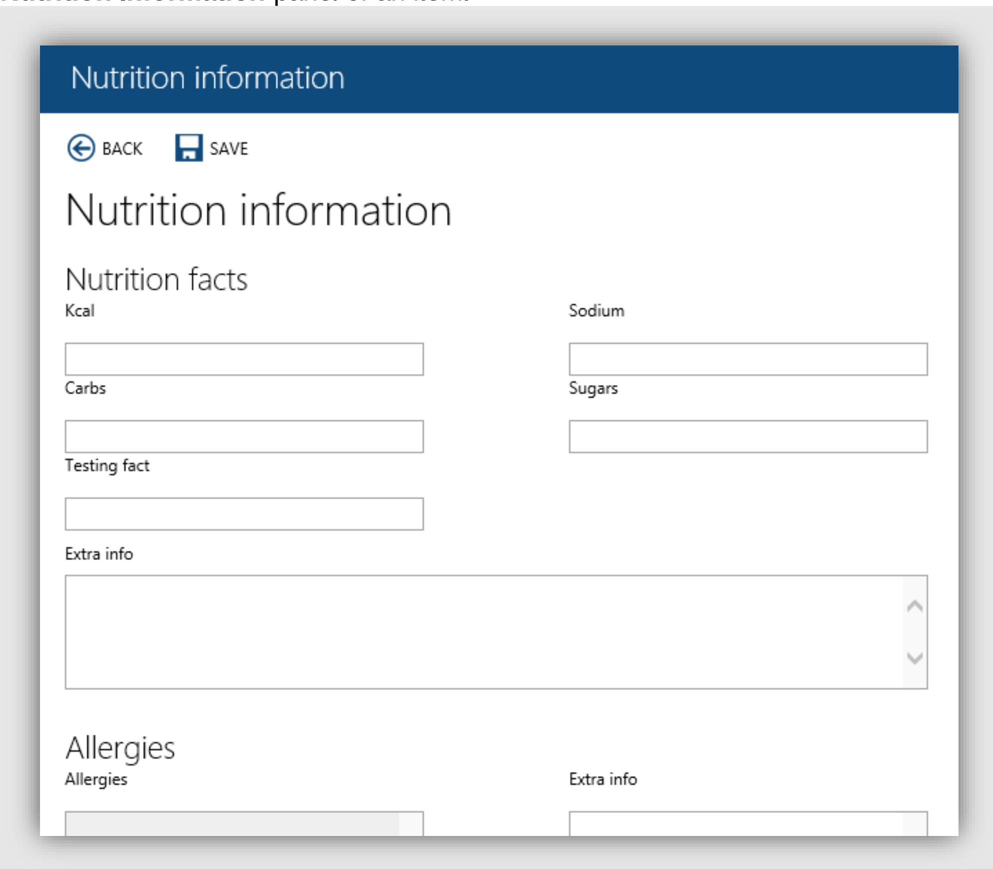
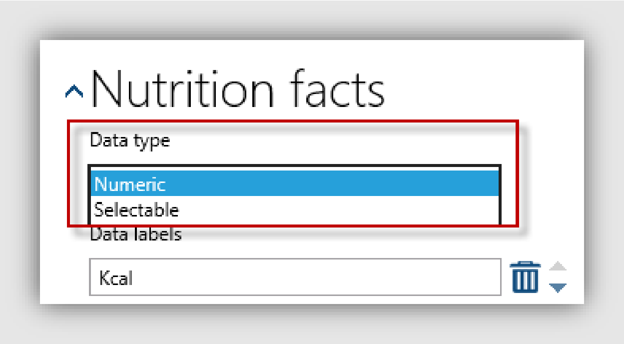


Figure 28. Nutrition information of an item

Data type

Data type helps you control how the nutrition information is filled in. There are 2 data types for you to select in each nutrition section:



- **Numeric**: The field is displayed as a text box and you can enter a numeric value.

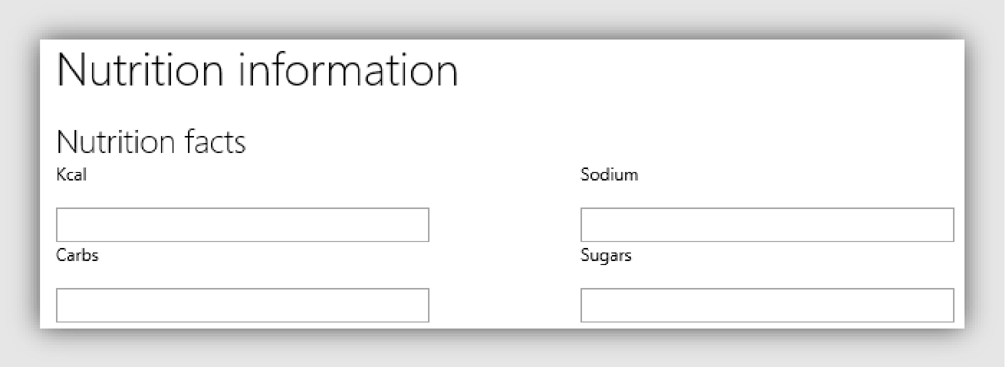


Figure 29. Datatype – Numeric

- **Selectable**: The field can be selected with a lookup button.

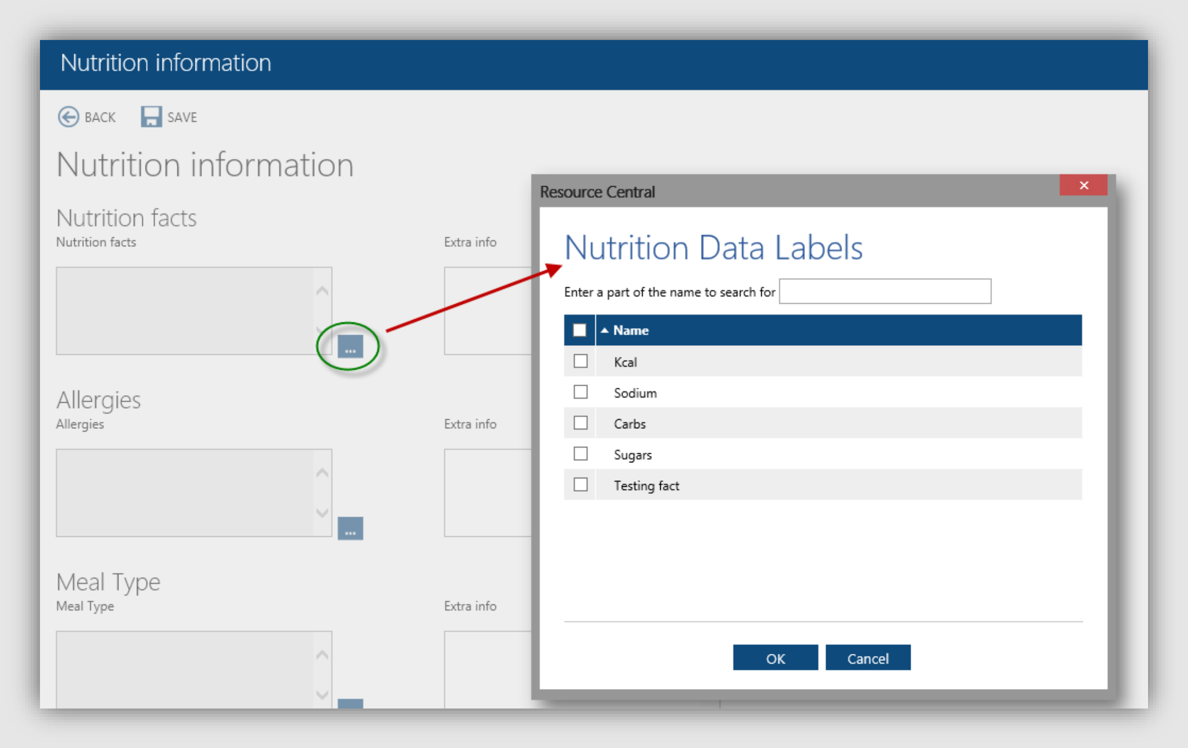


Figure 30. Data type – Selectable

It means that in the Nutrition information panel of an item, clicking the […] lookup button will open a new window for you to select data labels.

Logistics and delivery management

Occasionally caterers need more guidance on where to deliver. In that case, floor maps or guidance on how to find the destination for the delivery will be very helpful.

For this purpose, each resource now is equipped with 2 fields in its details so that its location image and description can be added. Go to RC backend → **Designer** → **Resource**. Open a resource and you can see these 2 fields in **Resource Properties** section:

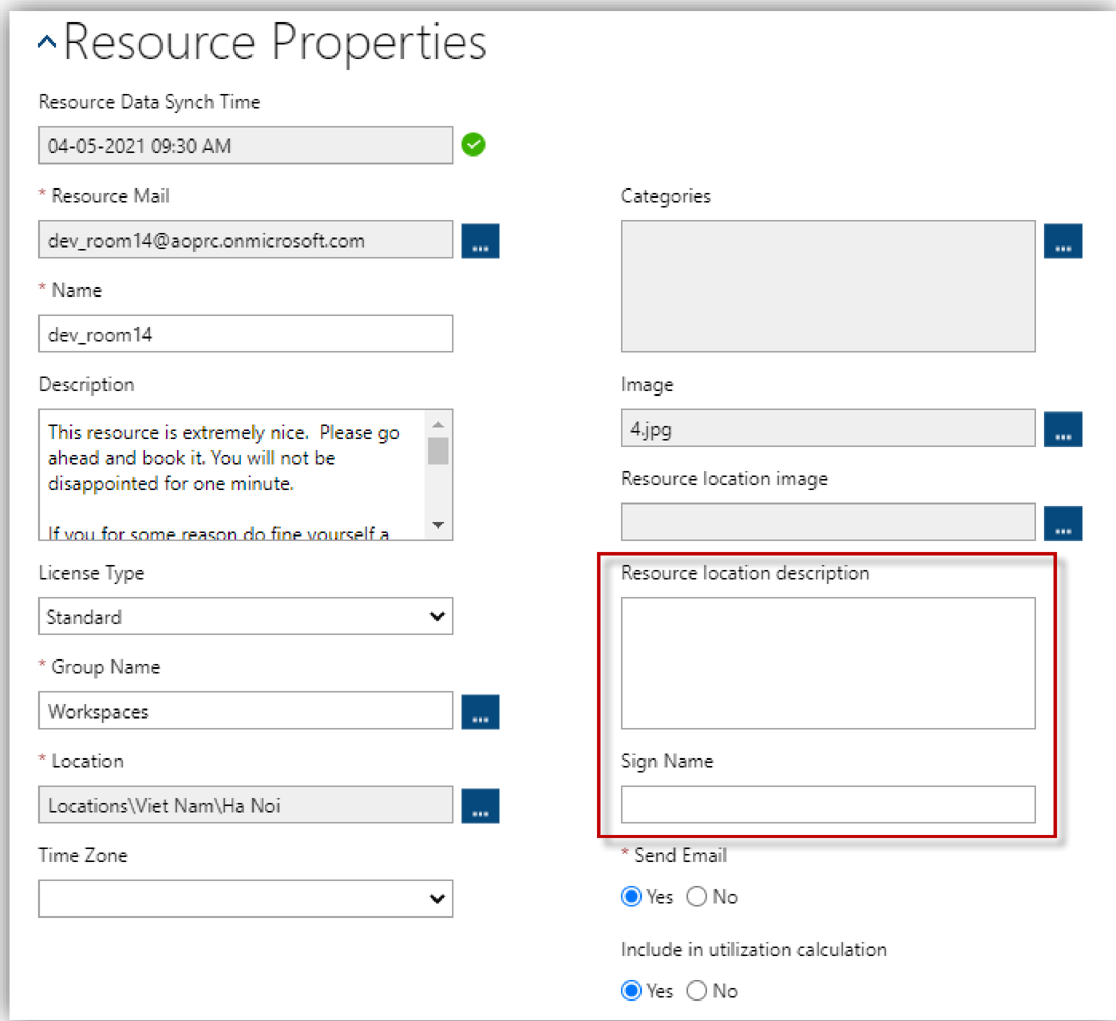


Figure 31. **Location image and description**

Fields	**Description**
Resource location image	Click […] button to select an image for the location. This can be a ground map or a photo of the resource front, so that the resource can be easily located. **NOTE**: The images for this selection can be uploaded in RC backend → **Designer** → **Images**.
Resource location description	Provide guidance on how to reach the location of the resource.

After providing the location image and description for a resource, any order booked with this resource will have an icon on the button bar when you open the order:

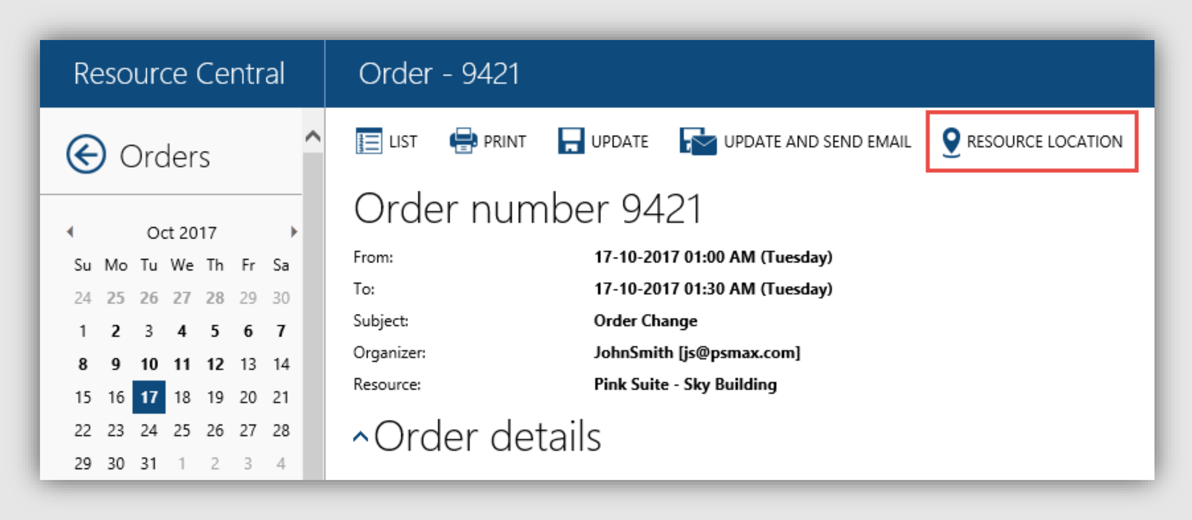


Figure 32. Resource location icon

Clicking on that icon leads you to another panel, where the image and desciption of the resource location are displayed:

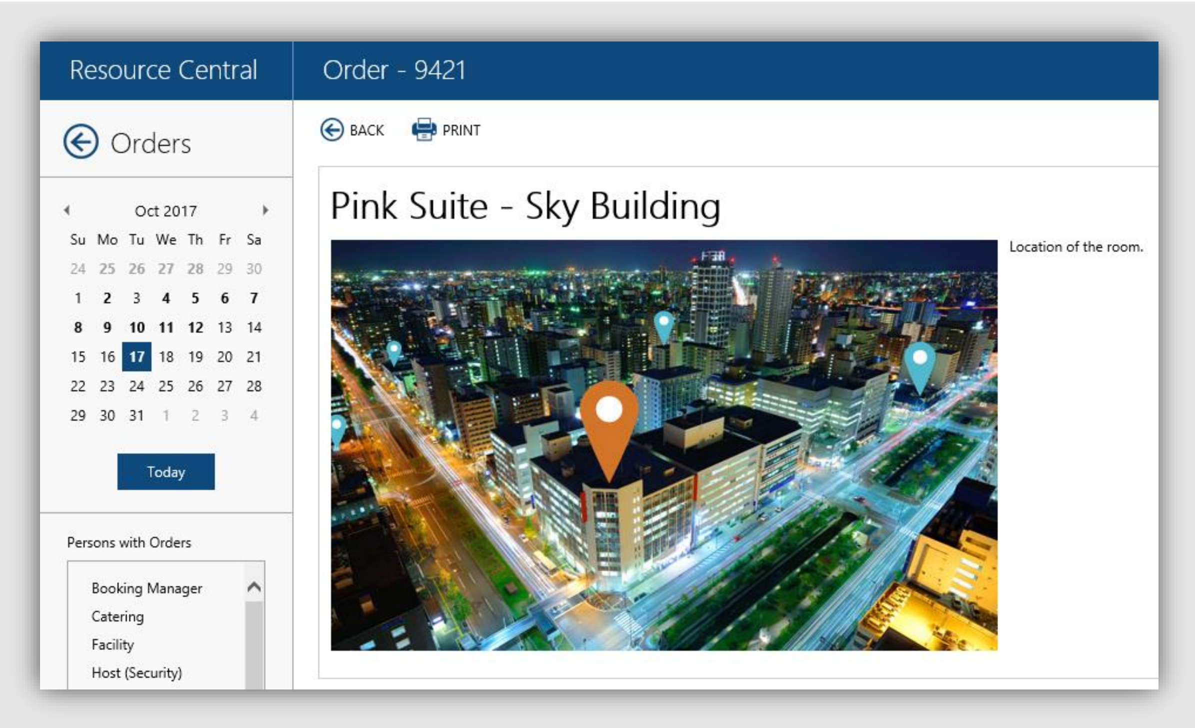


Figure 33. **Resource location image and description.**

CHAPTER 3.

Daily tasks for Reception Roles

The daily tasks section consists of the following areas:

- Reservations
- Overview
- Visitors

Reservations

This view displays all **reservations** on the currently **selected date** and the **location** for which the Service Provider is responsible. When opened for the first time, the current system date will need to be selected.

All reservations relating to a selected group under the '**Group'** section can be accessed by selecting the respective highlighted date from the Date Picker. Users will see the '**Default**' group in the Group list when no group has been created in Resource Central.

Please **note:**

- All Resources are defined per location and relate to the Service Provider logged in. This means that, you are only able to view those Resources which belong to the location you're connected to or "children" locations below this.
- This limitation also affects your ability to create or update resources.
- All the Reservations are also defined per location and relates to the Service Provider logged in. This means that you can only view the reservations of those Resources which are at the same Location as you or at "child" locations below this.

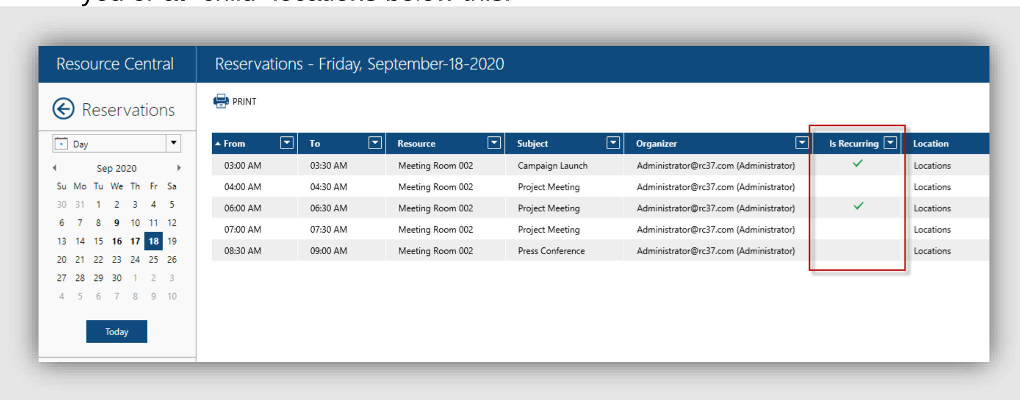
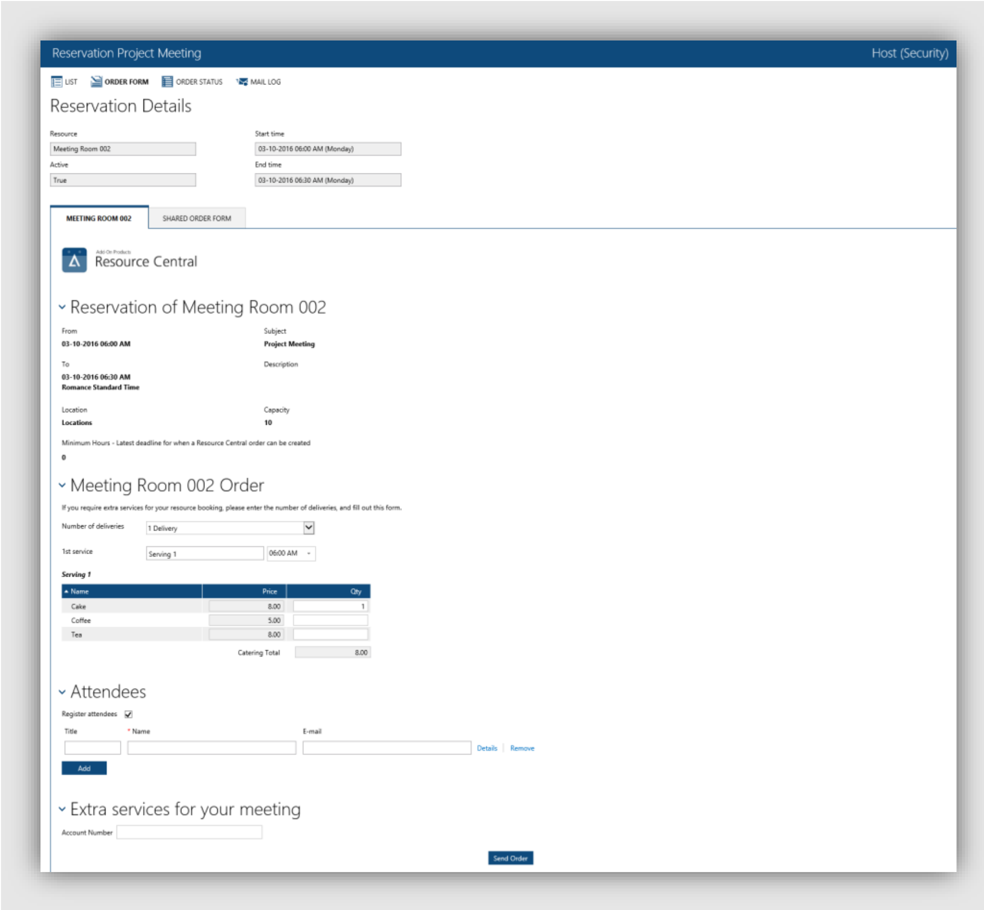


Figure 34. List of Reservations

As you can see in the highlighted area in the example, the "**Is Recurring**" caption identifies if the listed reservation is a recurring reservation or not.

By clicking on any of the reservations you will be able to display all details about it.

When viewing any given reservation, you will be presented with the following information:



Reservation details:

In the order form you are able to change the order of future reservations

All past reservation orders cannot be changed in Reservations

Figure 35. Reservation Details

To finalize all changes to the order, please remember to enter a message in the text box below and press the **[Send order]** button at the bottom of the order form.

Visitors

Upon registering visitors in Resource Central you then have to select the “Visitor” option in the pane. Once selected then all the visitors who have been registered will be listed here.

The overview of all registered visitors is also based on the Location or “Child” location of the Service Provider logged in. This means that you will only see visitors that are expected at your location. Instead of trying to locate individuals from long lists please consider this as a filter which ensures that only visitors arriving at your location will be listed.

The registration of visitors can happen from the designated section on the order form – however a user in the reception can also create a new registration of a visitor by clicking [**New**] on the toolbar.

After creating a new visitor, this can be associated with a reservation, department or a person. Furthermore, Resource Central can send a **Visitor Arrival Notification** to the organizer upon the arrival / registration of this visitor. The “notification” will be in the form of an email or text message once the visitor checks in.

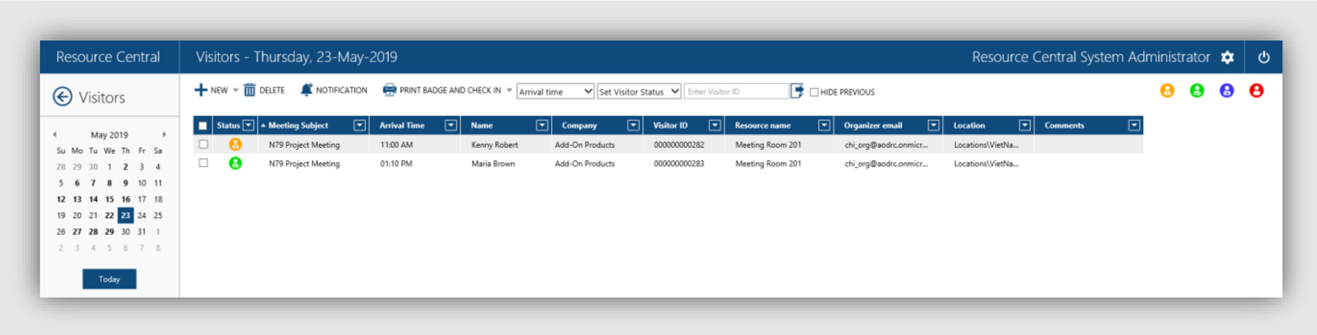


Figure 36. List of Visitors

Toolbar Buttons	Description
New	You can create a new visitor
Import Visitors	Import visitors from an Excel file
Download Template	Download an Excel template file to fill in visitor details
Print Badge and Check In	Print badges of visitors with status “Expected” and check them in
Print Badge	Print the selected badge

Visitor Arrival Notification

When a visitor checks in, Resource Central can send a **Visitor Arrival Notification** to the organizer upon the arrival / registration of this visitor. The “notification” will be in the form of an email or text message sent to organizer. This all depends on the availability of the feature SMS notification which can be configured in **RC backend → System → SMS Configuration**.

Option 1: SMS notification disabled

When you put in a valid barcode in the bar code control and click the button, you will be presented with a message that if you want to inform the organizer about the arrival of this visitor or not, as shown below:

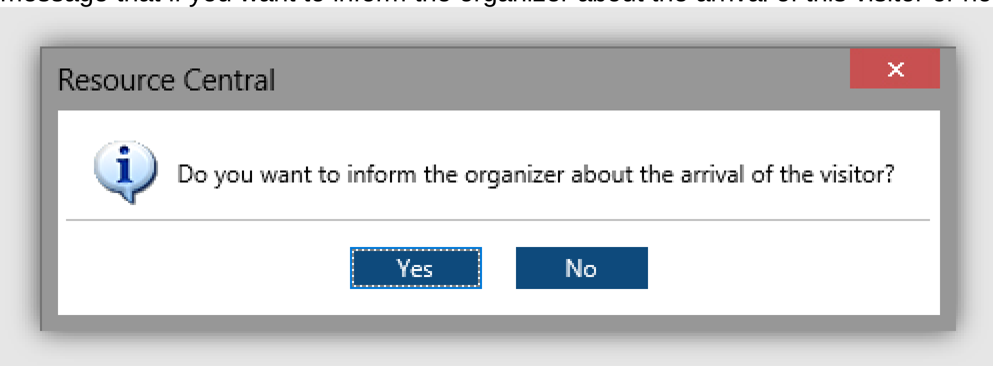


Figure 37. Visitor Arrival Notification Message

This message will only appear if value of **Visitor.Arrivalalert** Parameter is ‘**1**’. If this parameter is not created or it has ‘**0**’ value, this alert message will not show up.

For more details about creation of this parameter, please refer to **Resource Central Manager → General → Parameters**.

If you select ‘**NO**’, the organizer will not be informed and no email will be sent.

Selecting ‘**YES**’ will send an email to the organizer, notifying the arrival of that particular visitor as below:

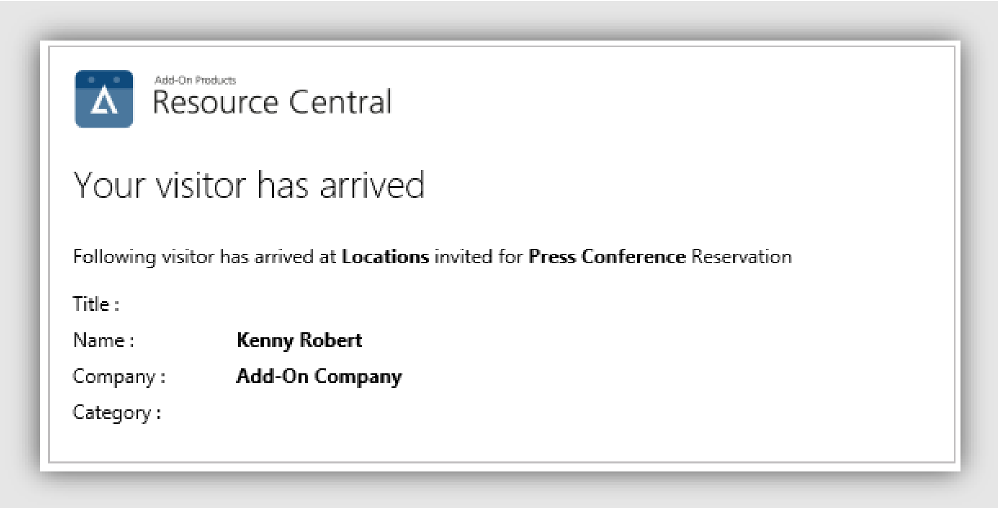


Figure 38. Visitor Arrival Email sent to the Organizer

Option 2: SMS notification enabled

RC supports sending text messages or emails to meeting organizers to notify them of visitors' arrival. You can select visitor in the list, click [**Notification**] button on the toolbar, and the following window shows up:

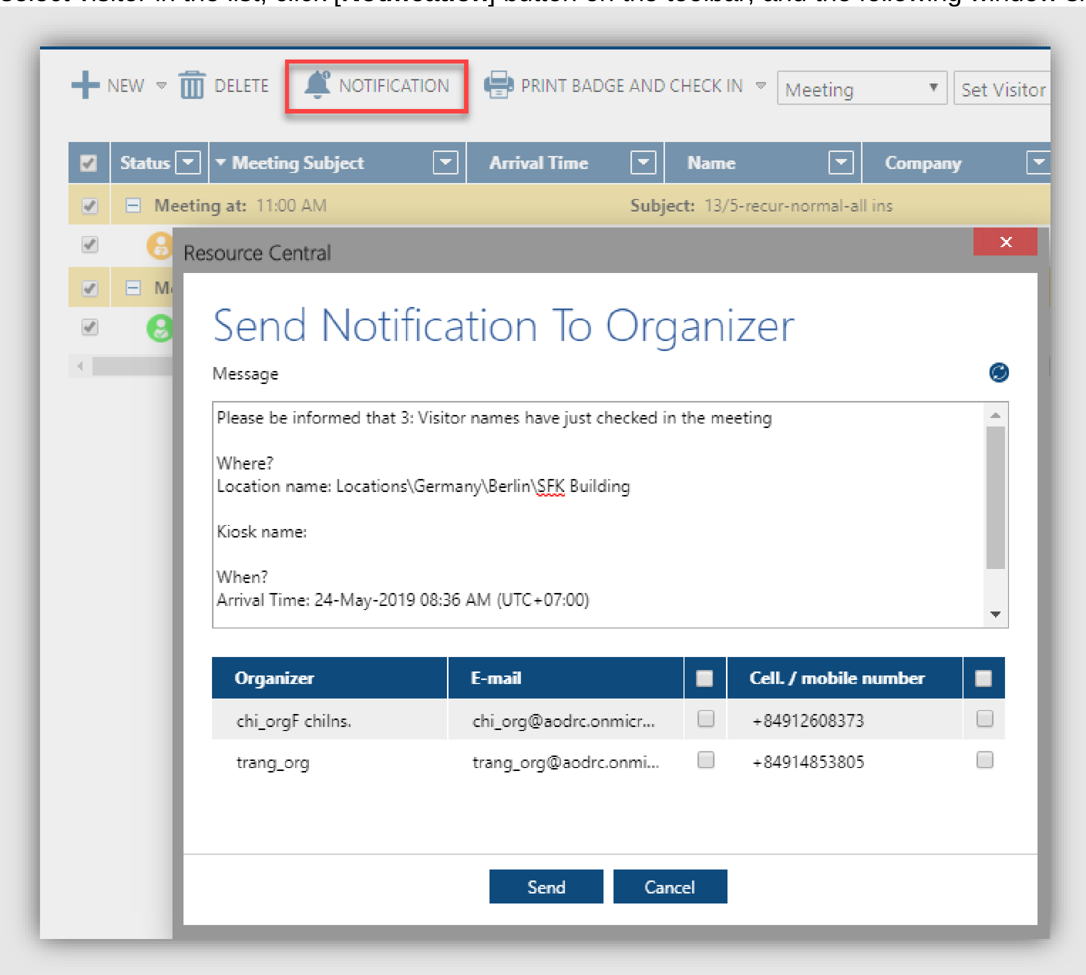


Figure 39. Configure Notification to meeting Organizer

In this panel, you can select notification options (by email or text message to organizer's cell phone). After making your selection or changing the message content as you wish, click [**Send**] to finish.

CHAPTER 4.

Standard Reports

The Reports section provides you with a number of reports used for viewing **statistics** and **order** information.

For more details about each standard report, please refer to **Reports** section in ***Resource Central Administrator Guide***.

CHAPTER 5.

Custom Reports

Resource Central provides you with some standard Reports which are all available after installation.

If the data they present is not equivalent to what you might need, then Add-On Products can create and offer you customized reports. Customized reports are based on your needs and are not generally available for other customers.

Please contact your administrator in order to start a dialog with us – allow us to help you in the best way.