



Add-On Products

Resource Central

User Guide

For RC 4.2

Document Revision 05

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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



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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

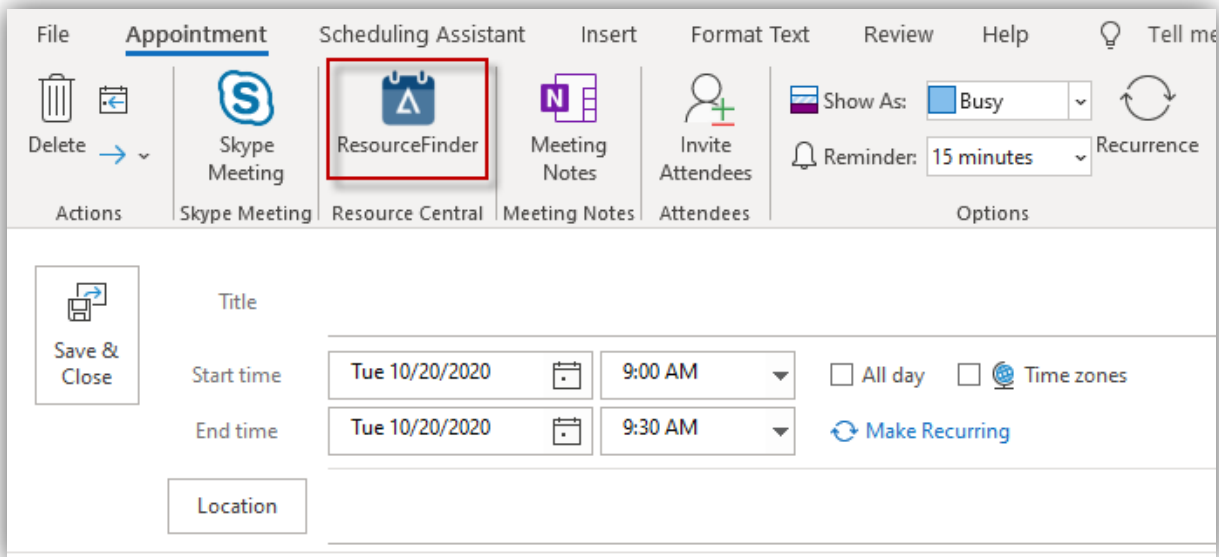


Figure 1. Room Booking

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.

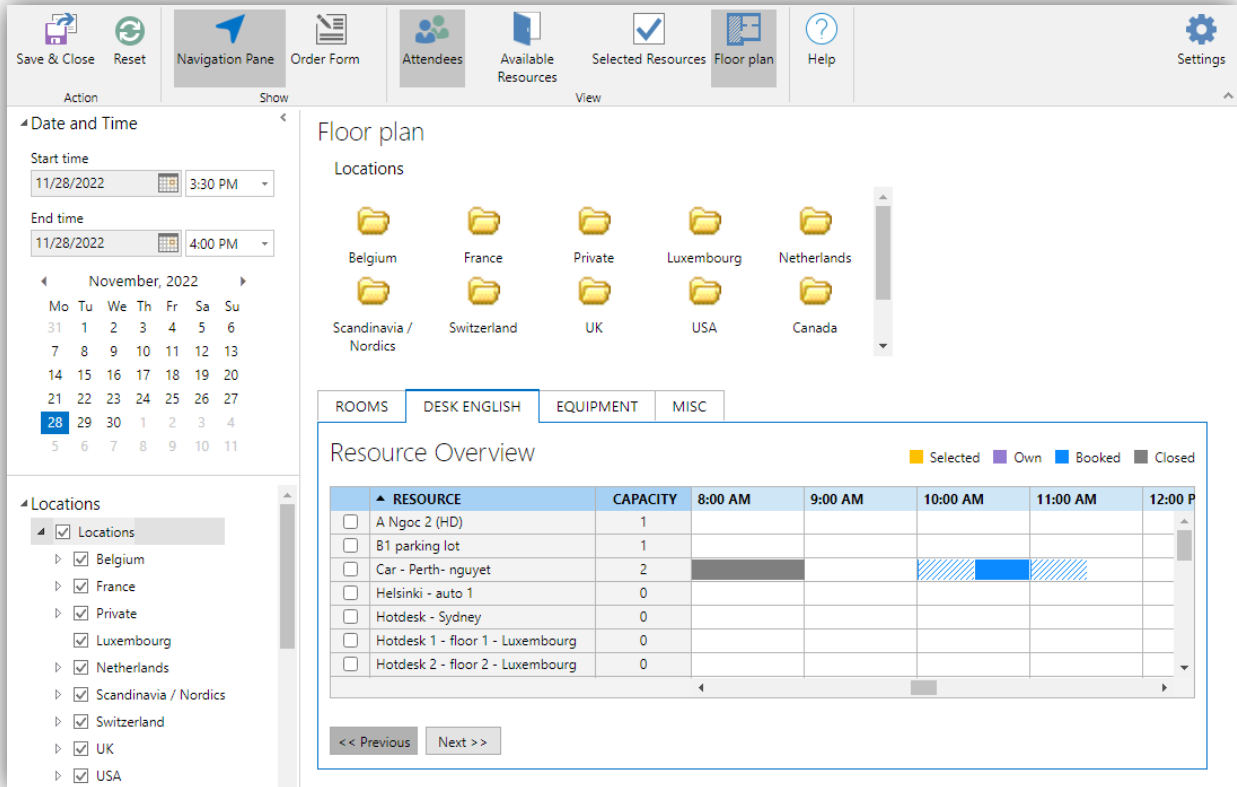





Figure 2. ResourceFinder Main Screen

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 ResourceFinder 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.

	It can also mean the resource has been closed at the time of your booking.
	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.
	The resource is going to be closed within a specific period. You cannot book it within that period.

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:

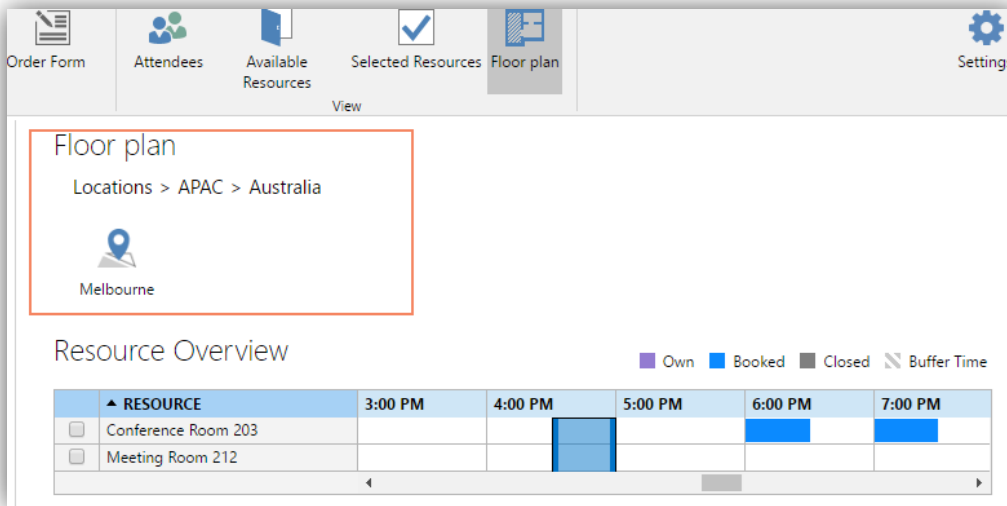


Figure 3. Floor plan enabled

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.

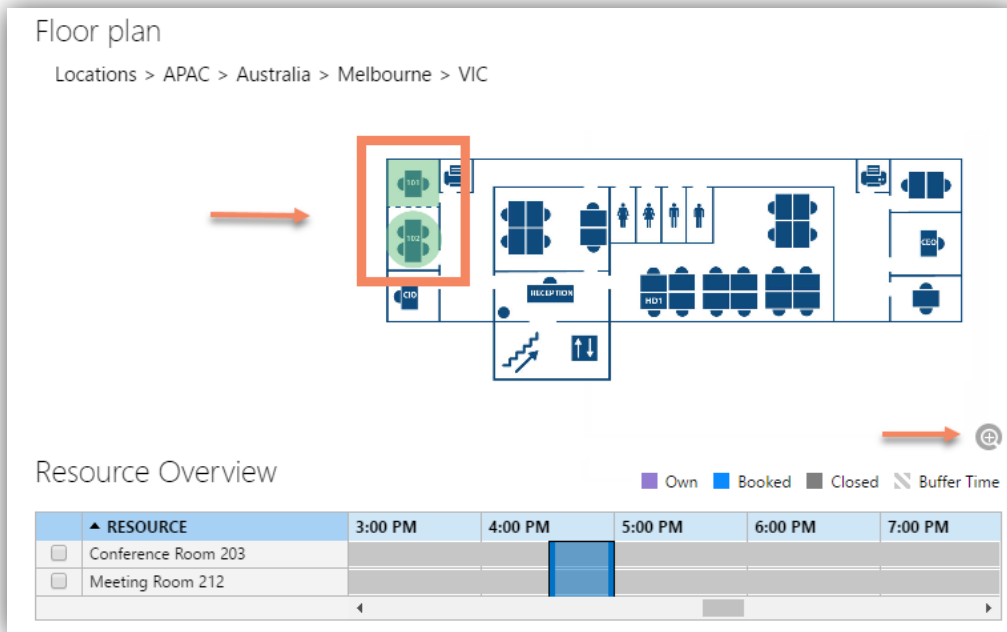



Figure 4. Floor plan display

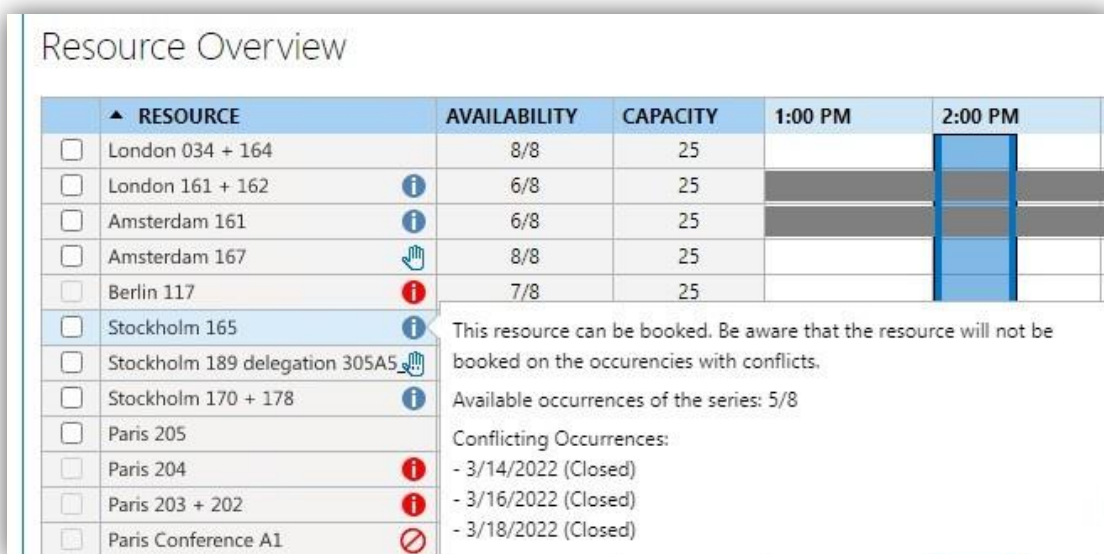
If you want to see the floor plan in bigger size, click the magnifier button (see the arrow in the screenshot) to enlarge it.

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

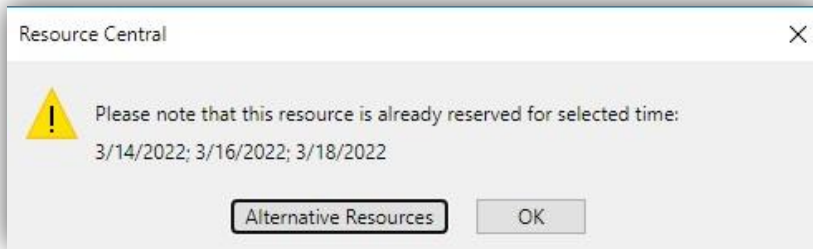
Booking an Alternative Resource for a recurring meeting

NOTE: This feature does not work if the meeting has multiple resources selected.

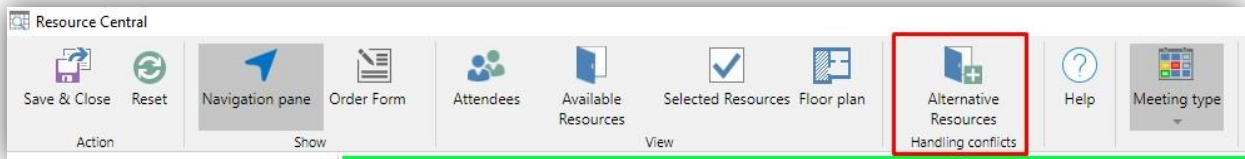
When you book a recurring meeting, you may see  icon (as mentioned above). It will inform you about the conflict, as well as the exact occurrences (conflicting dates):



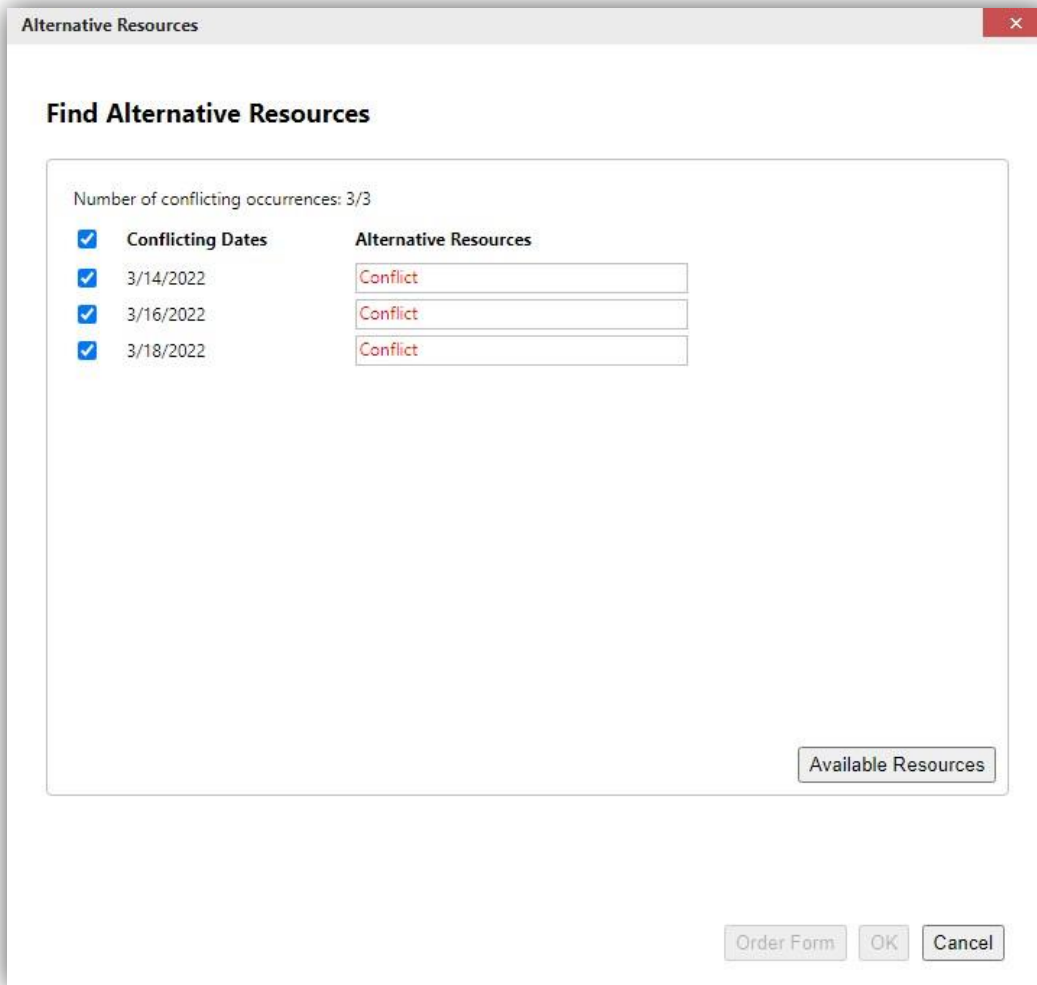
Selecting the resource will prompt a note message, e.g.:



You can click **[Alternative Resources]** to open alternative resources panel.
Or you can click **[OK]** to close the message, the **[Alternative Resources]** button will appear on toolbar:



Clicking the button will open the alternative resources panel as follows:



Here you can select the Conflicting Dates that show 'Conflict' status in Alternative Resources row, then click [Available Resources] to open the resource list:

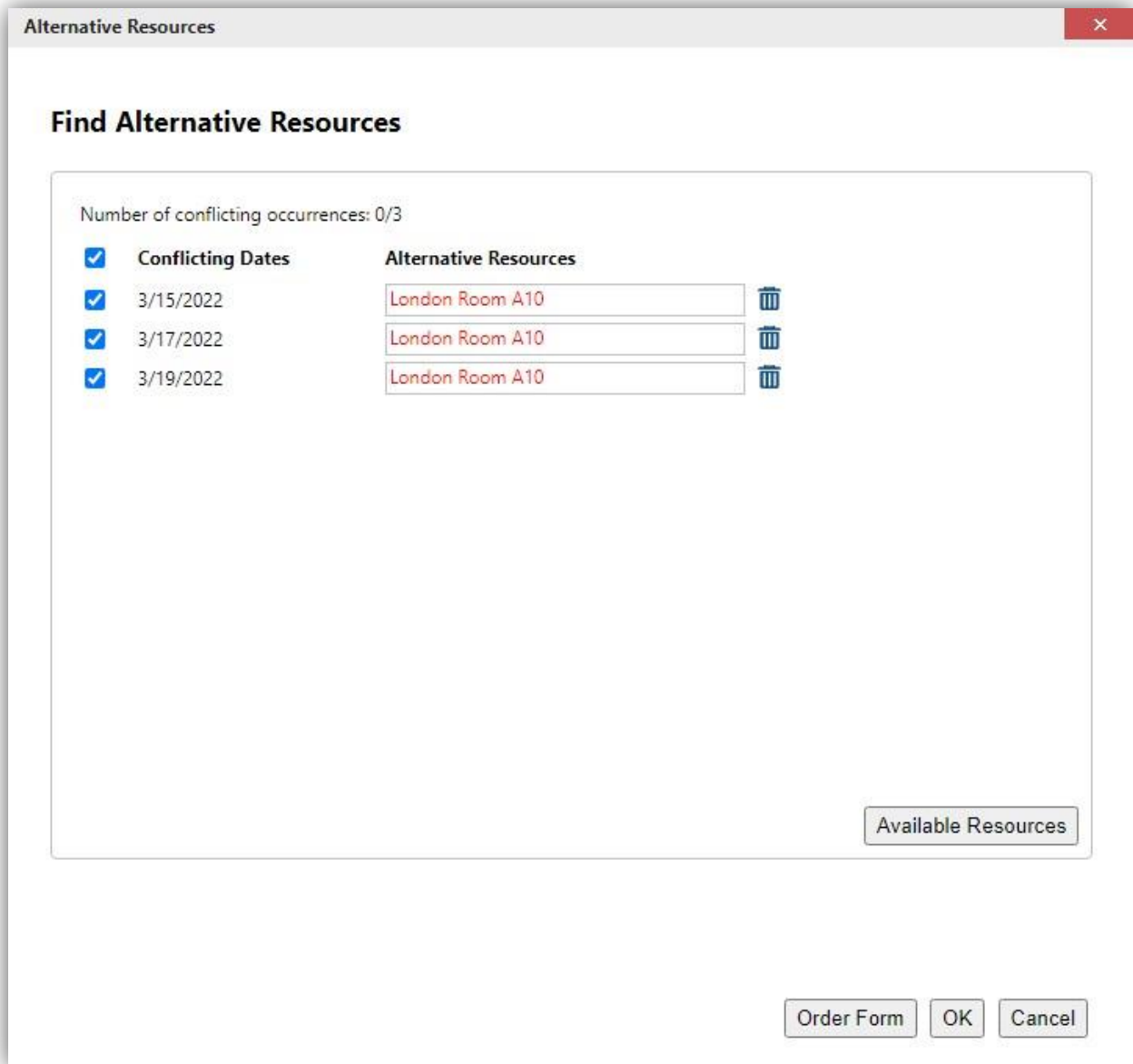
Find available resource for
3/14/2022 | 3/16/2022 | 3/18/2022

RESOURCE	AVAILABILITY	CAPACITY
<input type="checkbox"/> London 034 + 164	3/3	25
<input type="checkbox"/> London 161 + 162	1/3	25
<input type="checkbox"/> Amsterdam 161	1/3	25
<input type="checkbox"/> Amsterdam 167	3/3	25
<input type="checkbox"/> Berlin 117	2/3	25
<input type="checkbox"/> Stockholm 165	3/3	0
<input type="checkbox"/> Stockholm 189 delegation	2/3	5
<input type="checkbox"/> Stockholm 170 + 178	2/3	1
<input type="checkbox"/> Paris 205	2/3	0
<input type="checkbox"/> Paris 204	1/3	25
<input type="checkbox"/> Paris 203 + 202	3/3	0
<input type="checkbox"/> Paris Conference A1	2/3	1
<input type="checkbox"/> Basel-Room B1	3/3	0
<input type="checkbox"/> Basel-Room B2	3/3	25
<input type="checkbox"/> Basel-Room A5	2/3	25
<input type="checkbox"/> Espoo - kokoushuone 1	3/3	1
<input type="checkbox"/> Espoo - kokoushuone 2	3/3	0
<input type="checkbox"/> Geneva-Room CA	3/3	0

<< Previous Next >>

OK Cancel

On this list, you can select a new resource to replace the conflicted one, then click [**OK**] to bring you back to Alternative Resources panel. There you will see the new resource selected for the Conflicting Dates, i.e.:

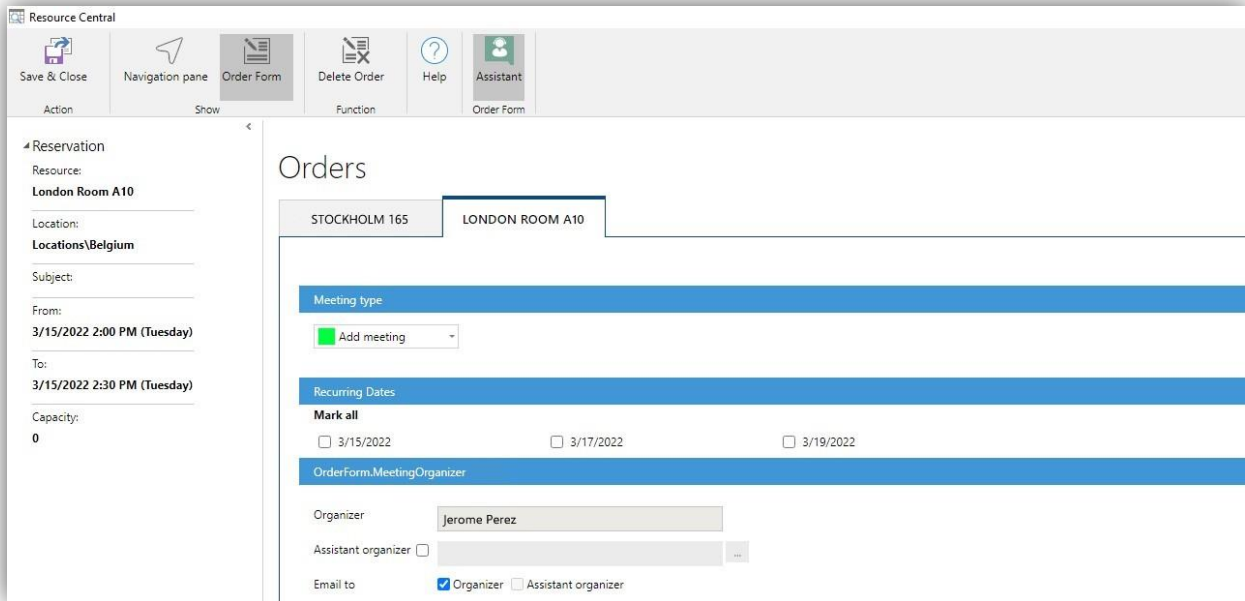


You can also click [**Trash**] icon to remove the respective alternative resource. It will revert the conflicting date back to '**Conflict**', allowing you to change resource for that date.

NOTE 1: If there is still conflicting date(s) with '**Conflict**' status even after selecting alternative resource, you have to select another resource for those dates that are still conflicted.

NOTE 2: If you select both dates with '**Conflict**' status and dates with new alternative resource, the [**Available Resources**] button will become unavailable. You have to select dates with '**Conflict**' status only in order to click the button again.

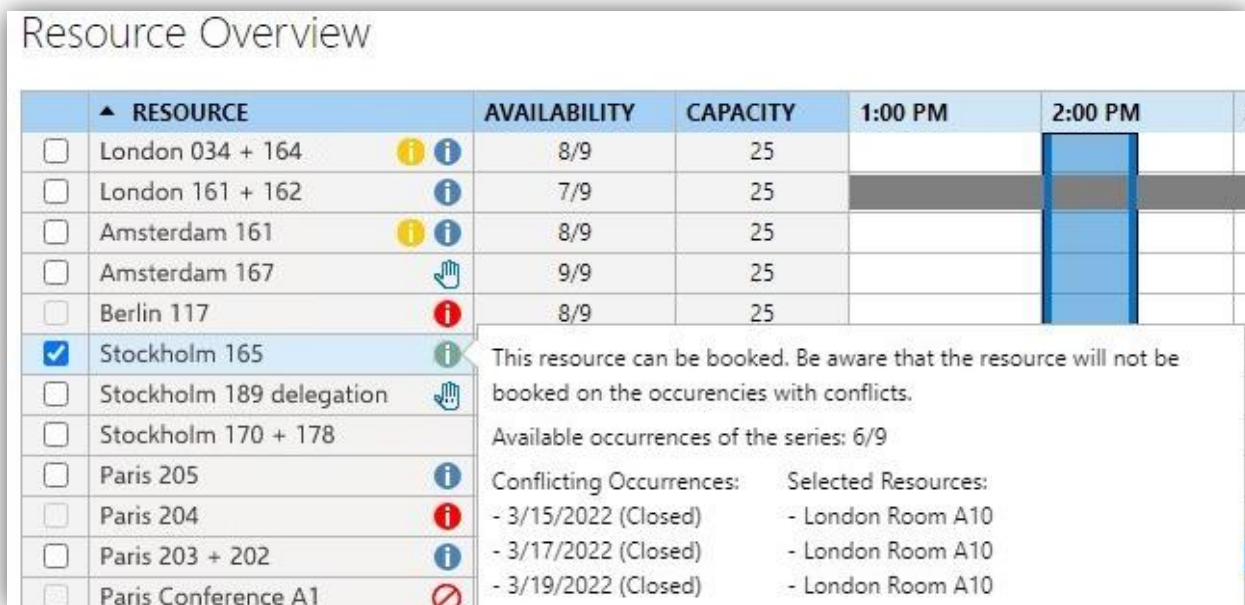
When you are done, click **[Order Form]** to start ordering additional services for each resource you have selected. The Order Form panel will let you order services for each of the selected resource (including the first one selected on ResourceFinder's resource list):



To learn more about ordering services, please refer to [Order Form](#).

NOTE: In case of recurring meeting, you have to either click **[Mark all]** to auto-select all dates, OR, select multiple dates individually if you don't want to order on all dates.

Once you are done with Orders, click on **[Navigation pane]** on toolbar to get back to ResourceFinder's resource list. You will see **i** next to the selected resource:



Hovering on the icon will still show the conflict occurrences, but you will see the alternative resources on Selected Resources row.

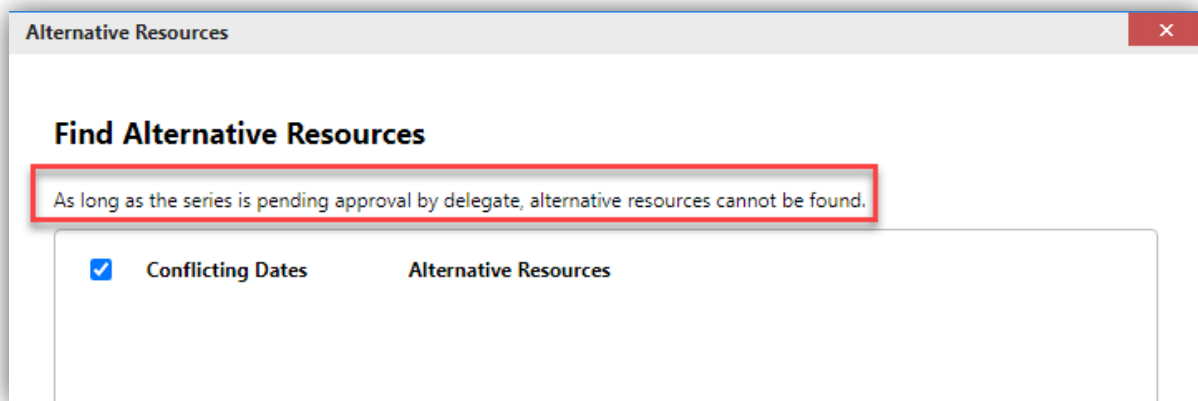
Click [**Save & close**] on toolbar to finish. Then on Outlook interface, click [**Send**] to book the meeting.

Hereafter, you will receive decline emails from Exchange on the conflicting dates and a confirmation email on the rest of the Series. Resource Central will then replace the declined resource with the Alternative Resource and you will receive the Exchange confirmation email for all the conflicting dates and new reservation or order emails from Resource Central.

NOTE: If you want to change alternative resource for a booked recurring meeting, in step 5 when you finally click [**Save & close**] on ResourceFinder, **do NOT click [Send Update] on Outlook** because your changes are already saved.

IMPORTANT NOTE: In case you book a new recurring meeting with conflicted occurrences, yet you have not selected Alternative Resources, you can still book the meeting. But since there are existing conflicts, your recurring meeting is actually pending approval by delegate.

If you open this pending recurring series and open Alternative Resources panel, you will NOT be able to select alternative resource for the time being. Also, the following message will be shown:



In order to book alternative resources, please wait until the approval process finishes.

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.

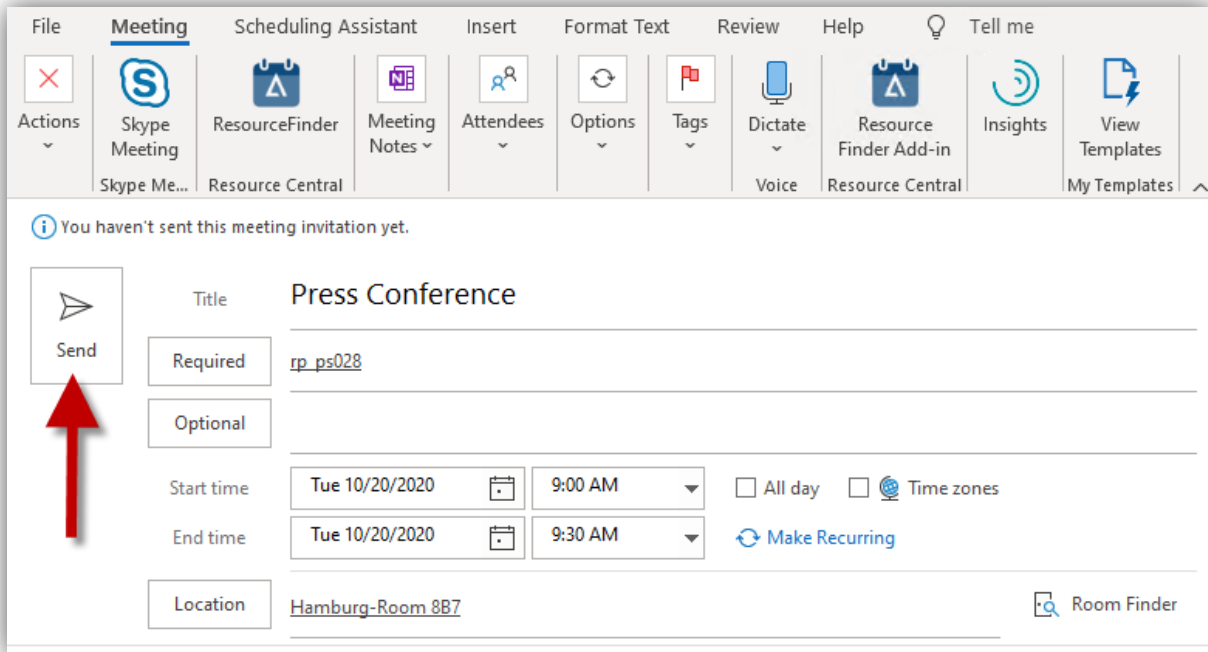


Figure 5. Meeting Request

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.

Meeting request when resource closed

In some cases, resource(s) may be closed for various reason. Those resources will show either warning:



Figure 6. Warning before closing date



Figure 7. Warning during closing & opening date

The resources are still available for booking if your reservation dates are outside the closed period (starting from Closing Date to Opening Date).

But if your **reservation dates are within closed period**, one of the following scenarios may occur:

Scenario 1: Booking or changing a meeting

- The booking date (the day organizer makes the booking) is before the Closing Date.
- The meeting date(s) (the time of the actual meeting) is within closed period.

→ **Result:** The reservation(s) is accepted, but organizer will receive resource-closure notification email, i.e.:

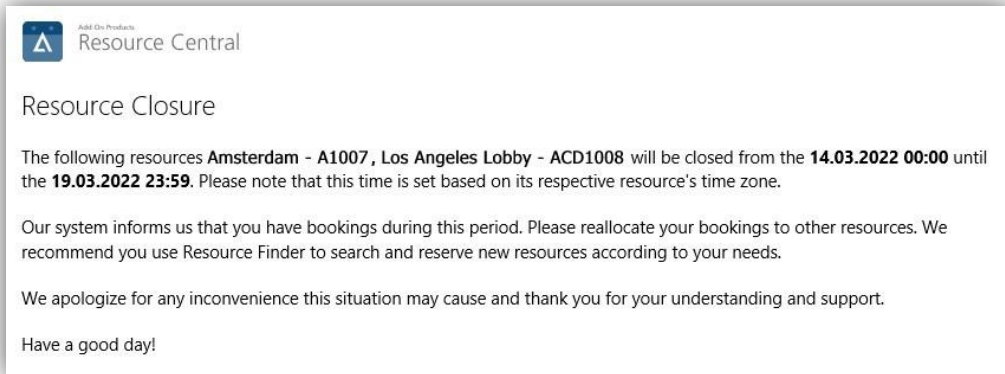


Figure 8. Resource closure notification

This will not cancel the meeting, but you need to change the booked resource, or select a different meeting date that is outside the closed period.

Scenario 2: Booking or changing a meeting

- The booking date is within the closed period.
- The meeting date(s) is within the closed period.

→ **Result:** The meeting is declined due to closed resource(s), and you will receive a different email informing the reason.

Scenario 3: When you book a recurring meeting, if:

- The booking date is within the closed period.
- There are recurring dates that are within the closed period.

→ **Result:** The meeting is accepted; however, reservation in recurring date(s) within closure period is declined. In this scenario, you have to book alternative resource for those declined dates (refer to [booking alternative resource](#)).

CHAPTER 4.

Ordering services for your meeting

In the email from Resource Central you will find a summary of the reservation in regard 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.

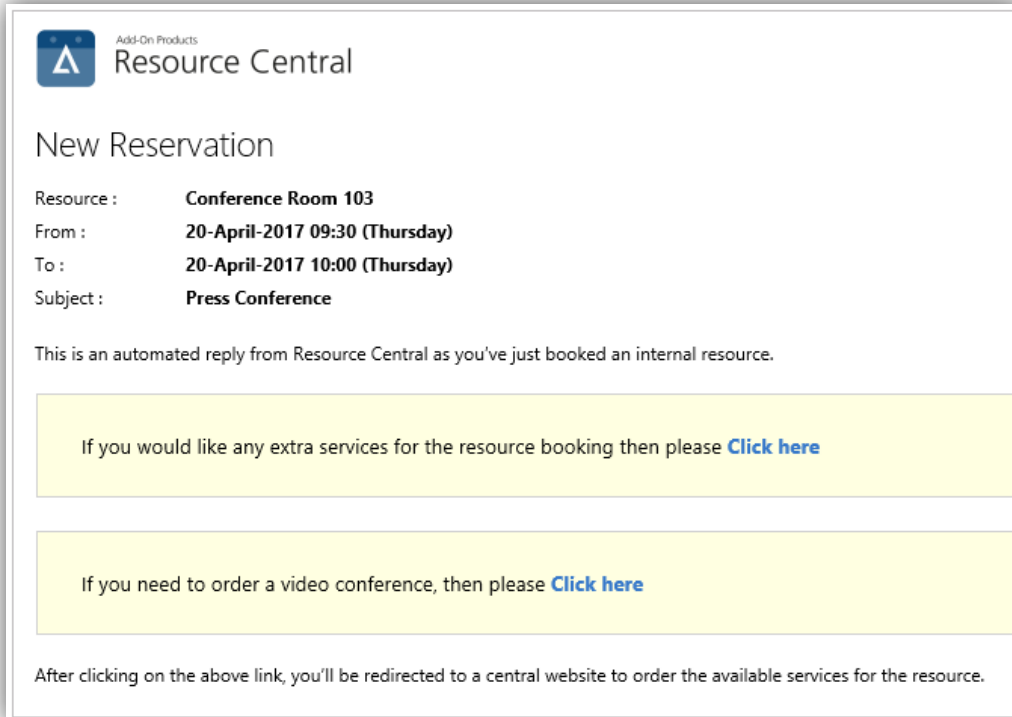


Figure 9. Order Mail

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 ps10_001 normal

From September/15/2022 10:30 (Thursday)	Subject Project Meeting
To September/15/2022 11:00 (Thursday) Romance Standard Time	Description import standaard resources
Location Locations\US\New York	Capacity 10

PS10_001 NORMAL Order

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

Number of deliveries	<input type="text" value="1 Delivery"/>	
1st service	<input type="text" value="Serving 1"/>	<input type="text" value="10:30"/>
Comments		

Serving 1

Name	Price	Qty	
Cocacola	10.00	1	
Fish	10.00		
item1	10.00		Ⓢ
item2	10.00		
item3	10.00		Ⓢ
item4	10.00		
☰ Menu 3	256.00		
Vegetable	10.00		

Catering Total

Visitors

Register visitors

Visit detail

Invitee (Organizer) <input style="width: 90%;" type="text" value="Mark Olin"/>	Host <input style="width: 90%;" type="text"/>	Zones <input style="width: 90%;" type="text"/>
---	--	---

NOTE: Items with Ⓢ icon cannot be booked because the deadline for these items has been passed.

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 10. 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, simply enter 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.

You can also register visitors in 'Visitors' section by clicking **[Add]**, then enter their information, e.g.:

You can also assign a person to be your visitors' Host using his/her email address in your organization domain, and select zones that your visitors can go to.

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.

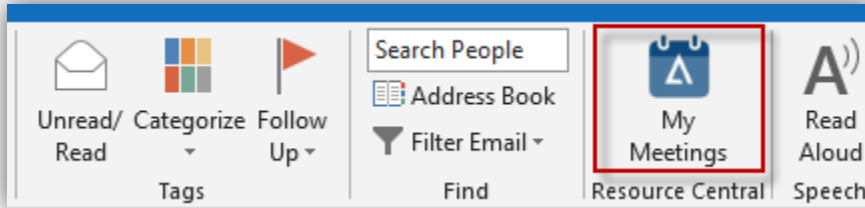


Figure 11. My Meetings

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

My Meetings navigation

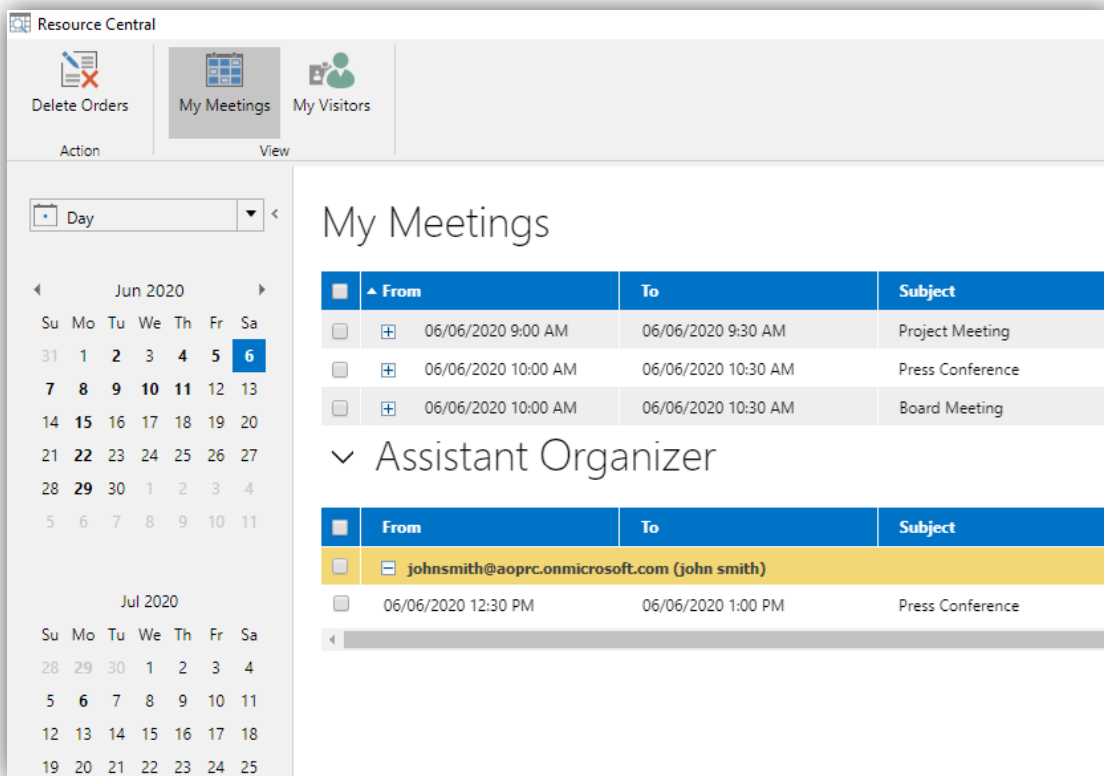


Figure 12. My Meetings Navigation

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.

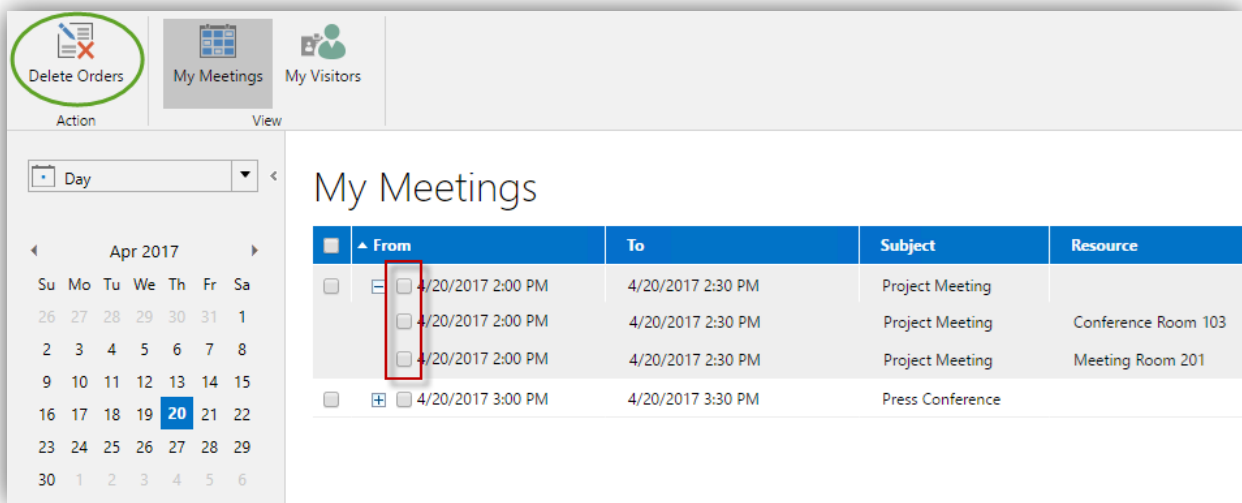


Figure 13. Delete orders

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.

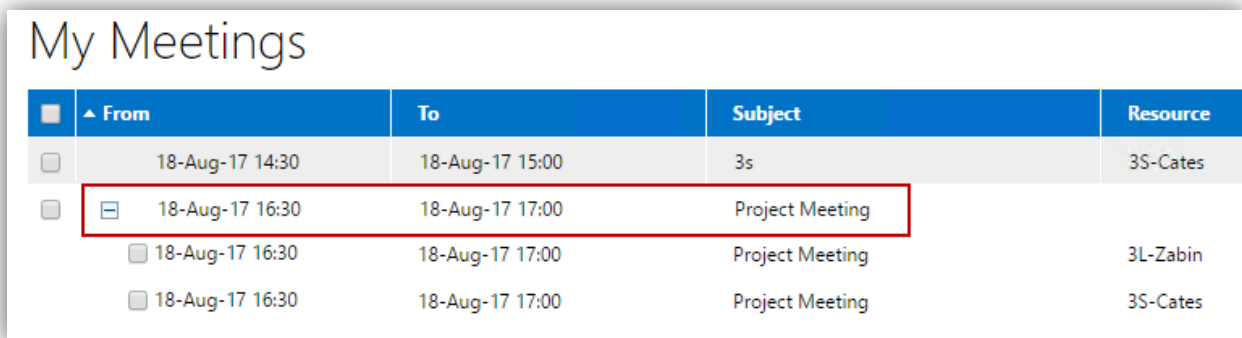


Figure 14. Multi-Room Booking without shared order

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:

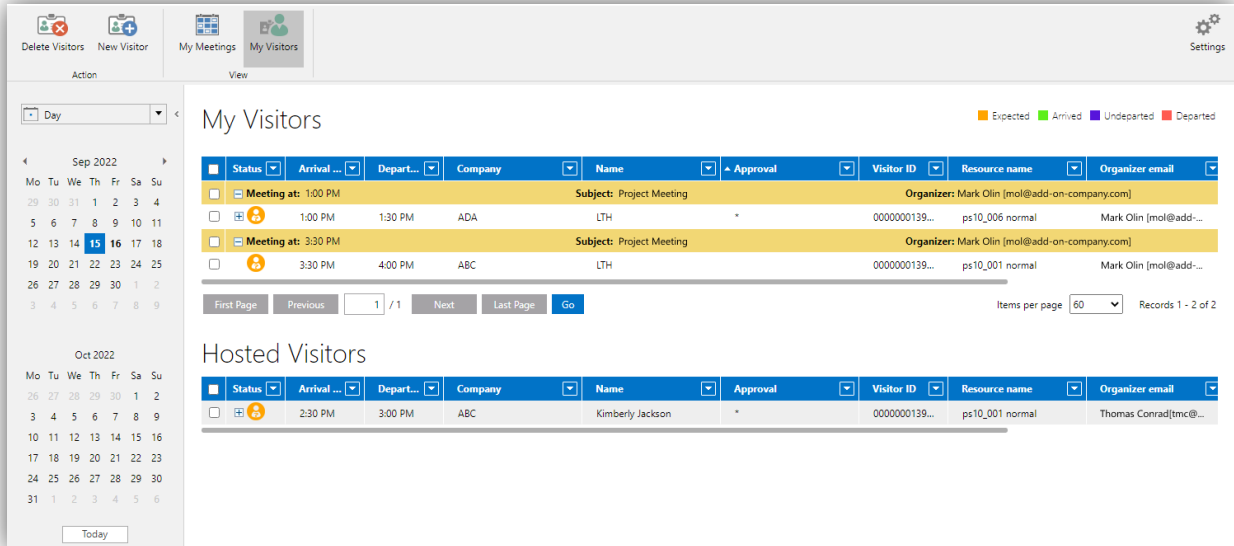


Figure 15. My Meetings – Visitor list

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

'My Visitors' list shows visitors who are invited to your meetings.

If you are also designated as a Host, the 'Hosted Visitors' list will show visitors that you need to take care of during their visit.

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

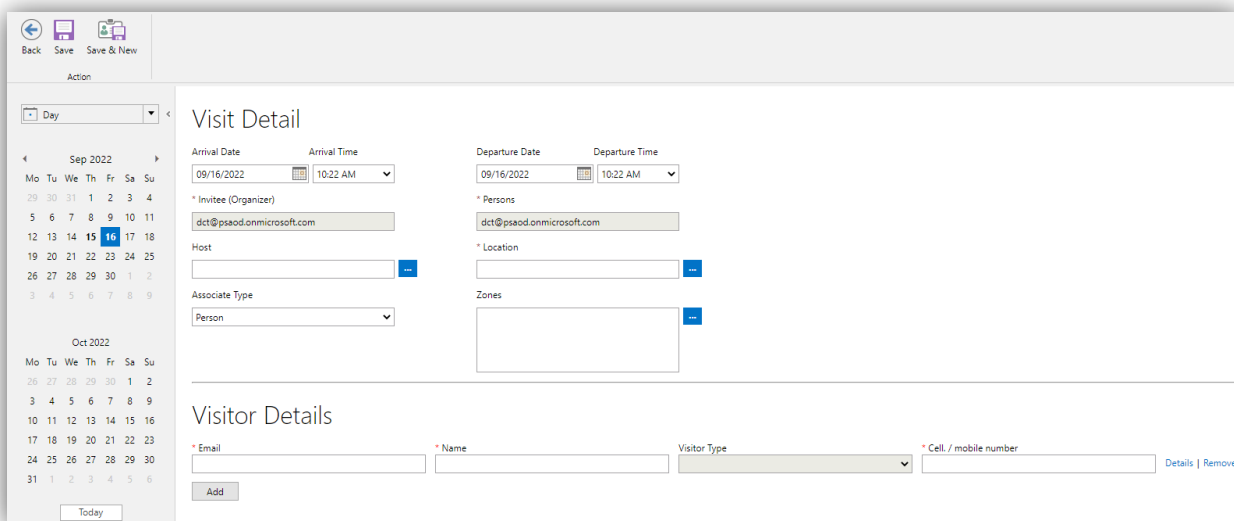


Figure 16. Add a visitor to a meeting/person

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:

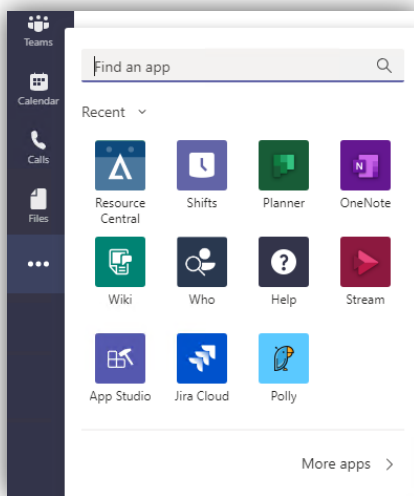


Figure 17. Apps in Teams

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

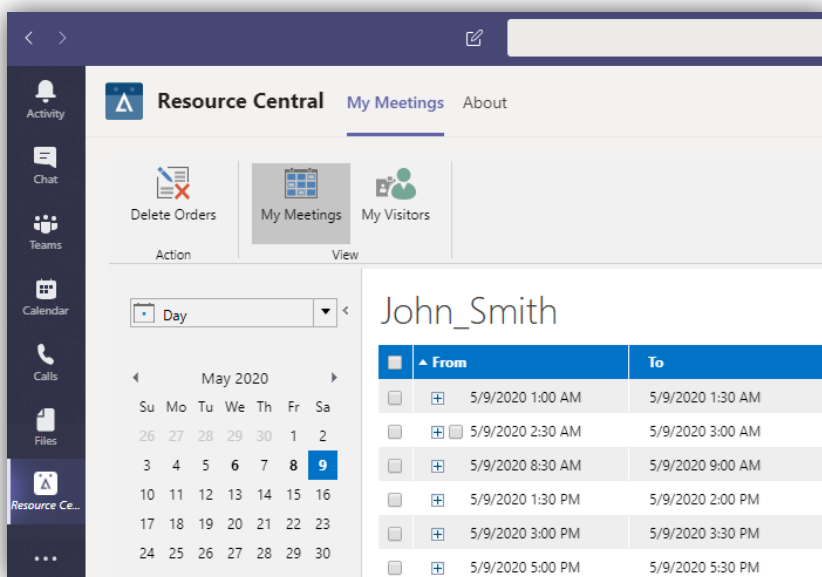
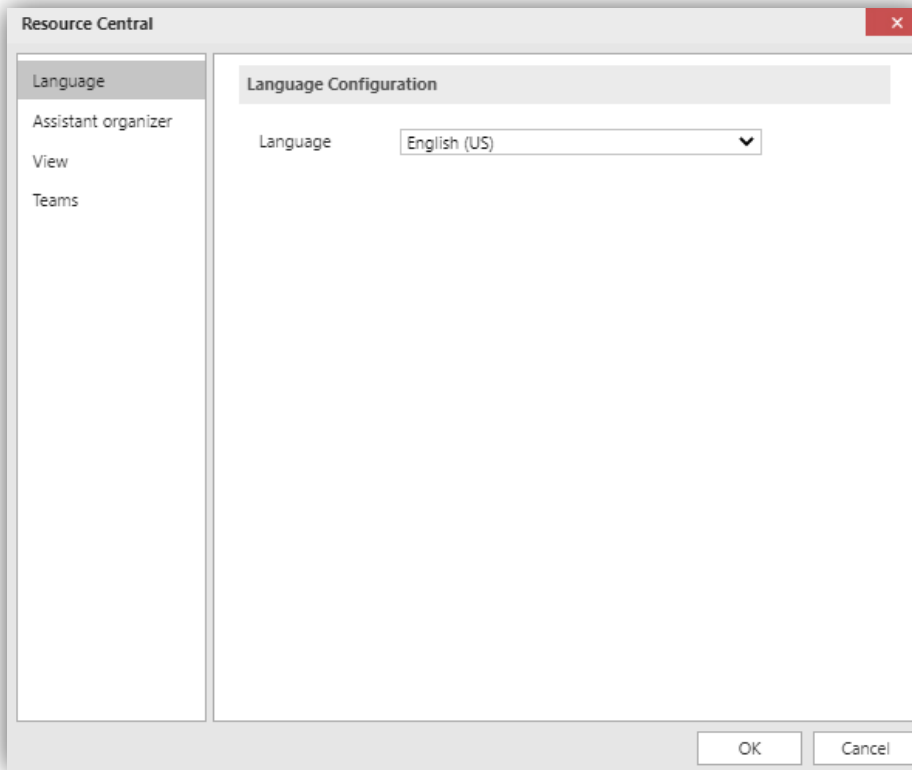


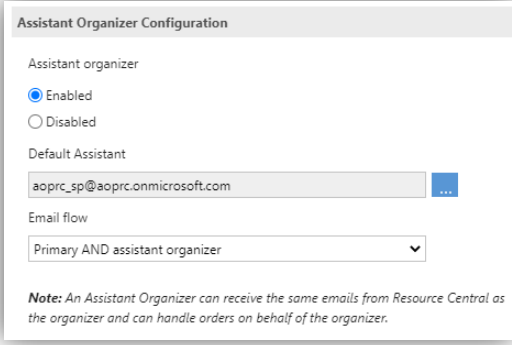
Figure 18. My Meetings in Teams

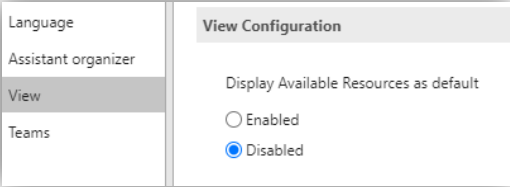
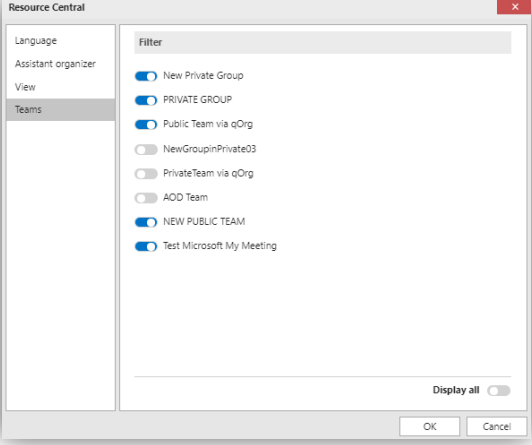
Now you can perform actions similar to those with My Meetings in Outlook.

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. 
View	Select if you want available resources are displayed

	
<p>Teams</p>	<p>Enable or disable teams shown in My Meetings in Microsoft Teams</p>  <p>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.</p>

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.

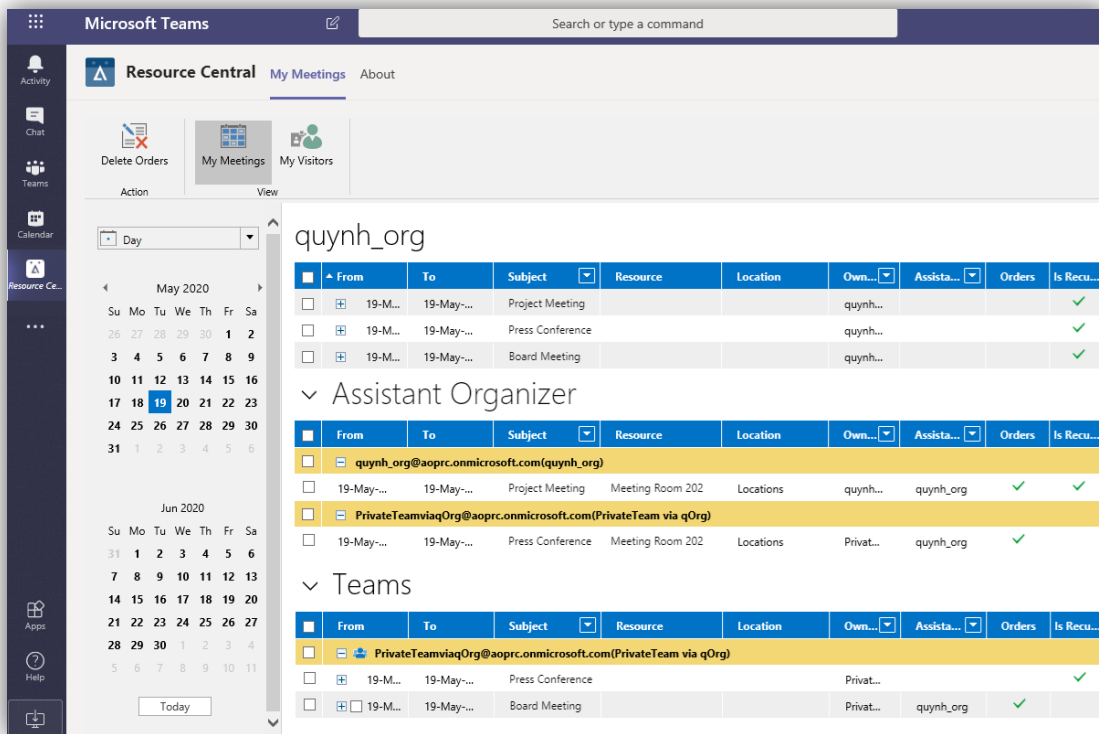


Figure 19. My Meetings in Teams

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

Change Language

You can change language on ResourceFinder by clicking on the [**Settings**] button at the upper right corner of the interface. The following window shows up:

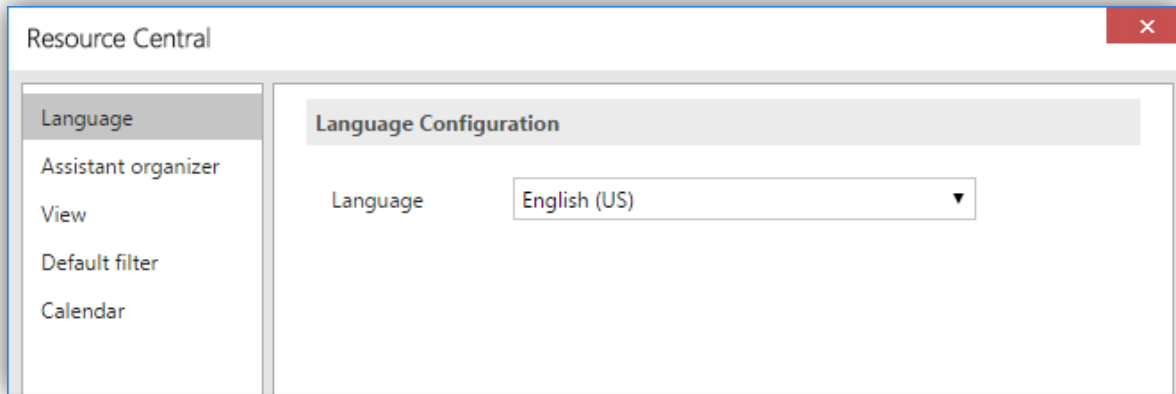


Figure 20. Settings – Language

Go to Language section, then select your preferred language and click [**OK**] to finish.

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**.

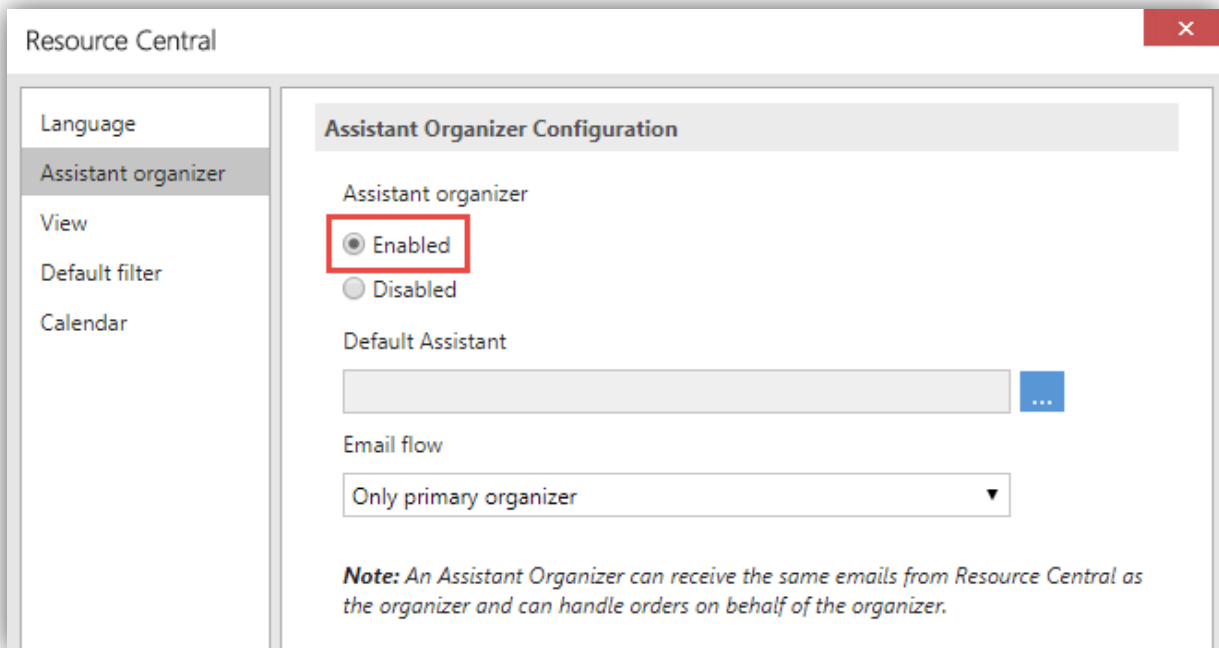


Figure 21. RF Settings – Assistant Organizer

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:

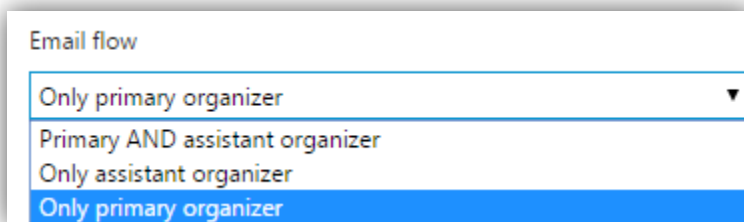
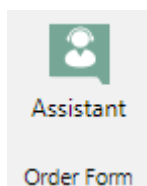


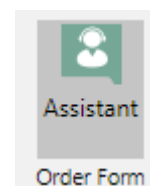
Figure 22. Email flow setup

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

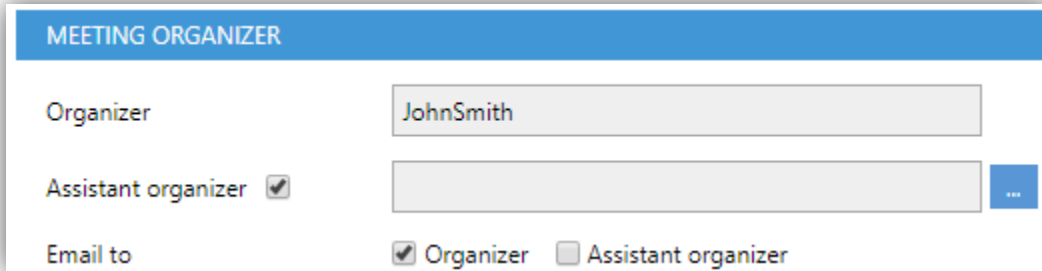
Disabled Assistant



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:



MEETING ORGANIZER

Organizer: JohnSmith

Assistant organizer: [...]

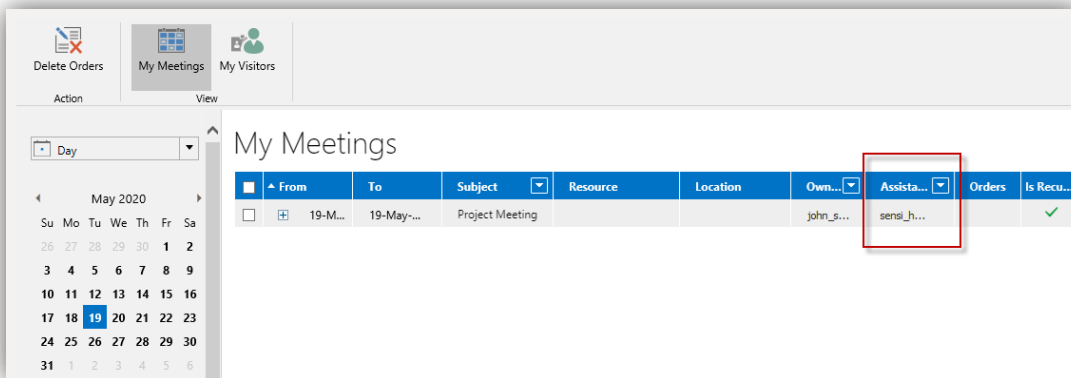
Email to: Organizer Assistant organizer

Figure 23. 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.

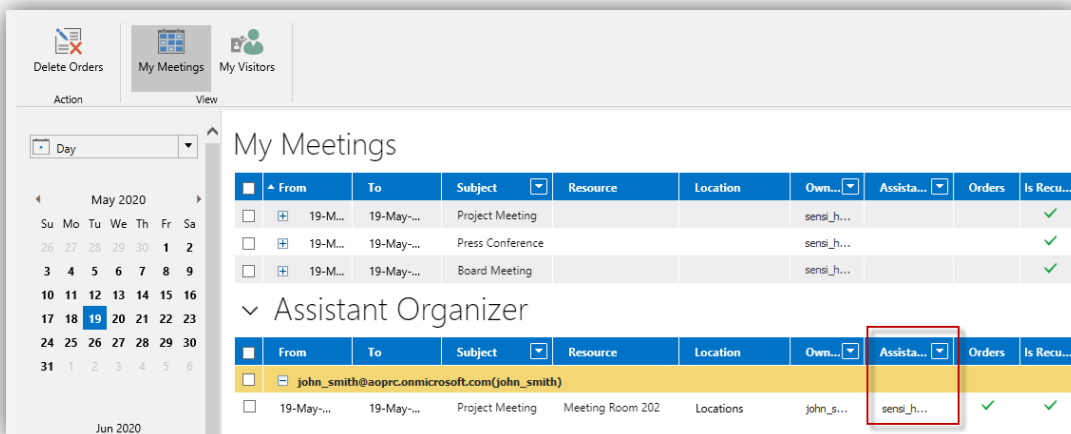
This is what the primary organizer (in this example, it is John Smith) sees in My Meetings:



From	To	Subject	Resource	Location	Own...	Assista...	Orders	Is Recu...
19-M...	19-May...	Project Meeting			john_s...	sensi_h...		✓

Figure 24. My Meetings opened by Primary Organizer

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



From	To	Subject	Resource	Location	Own...	Assista...	Orders	Is Recu...
19-M...	19-May...	Project Meeting			sensi_h...			✓
19-M...	19-May...	Press Conference			sensi_h...			✓
19-M...	19-May...	Board Meeting			sensi_h...			✓

Assistant Organizer

From	To	Subject	Resource	Location	Own...	Assista...	Orders	Is Recu...
john_smith@aoopc.onmicrosoft.com(john_smith)								
19-May...	19-May...	Project Meeting	Meeting Room 202	Locations	john_s...	sensi_h...	✓	✓

Figure 25. 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:

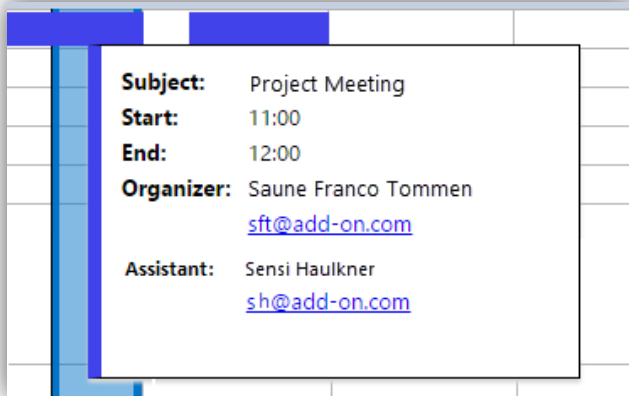


Figure 26. Resource Overview – Booking details

View Options

You can choose to display the following options by default on your ResourceFinder interface via **Settings** → **View**:

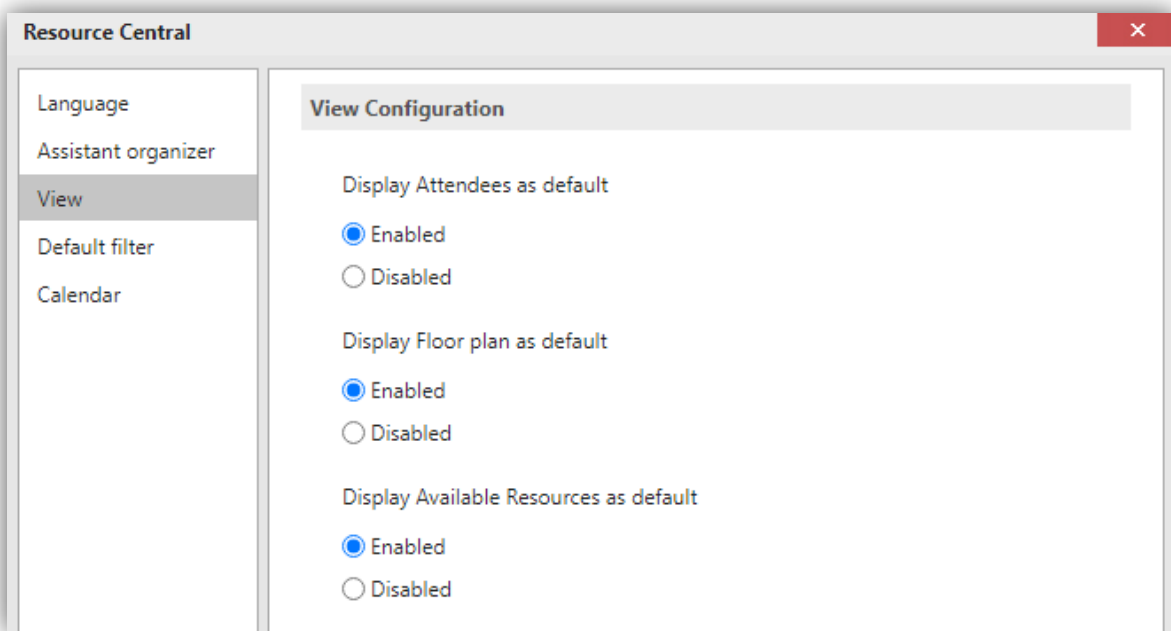


Figure 27. RF Settings – View

- **Display Attendees as default:** enable this option to display the 'Attendees' section

Attendees

Busy
 Tentative
 Out of office
 Working Elsewhere
 No information

NAME	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM
Dinh Công Tuấn								

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- **Display Floor plan as default:** enable this option to display the 'Floor plan' section

Floor plan

Locations

Belgium	France	Private	Luxembourg	Netherlands
Scandinavia / Nordics	Switzerland	UK	USA	Canada
Dubai	Australia	VN	Test 3	Singapore

- **Display Available Resources as default:** enable this option to make the 'Resource Overview' section to show available resources only by default

Resource Overview

RESOURCE	CAPACITY	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM
<input type="checkbox"/> Basel-Room ...	0					
<input type="checkbox"/> Espoo - koka	1					
<input type="checkbox"/> Hanoi	0					
<input type="checkbox"/> London Roo...	0					
<input type="checkbox"/> Munich-Roo...	0					
<input type="checkbox"/> Nguyet- per...	0					
<input type="checkbox"/> Nguyet_ps5_...	1					
<input type="checkbox"/> Nguyet_ps5_...	0					
<input type="checkbox"/> Nguy-Pool1(...	6					
<input type="checkbox"/> Oslo - Motel...	0					

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Default filter for resource categories

You can choose which resource categories to display by default via ResourceFinder **Settings** → **Default filter**. Simply tick on your wanted categories and click **[OK]**.

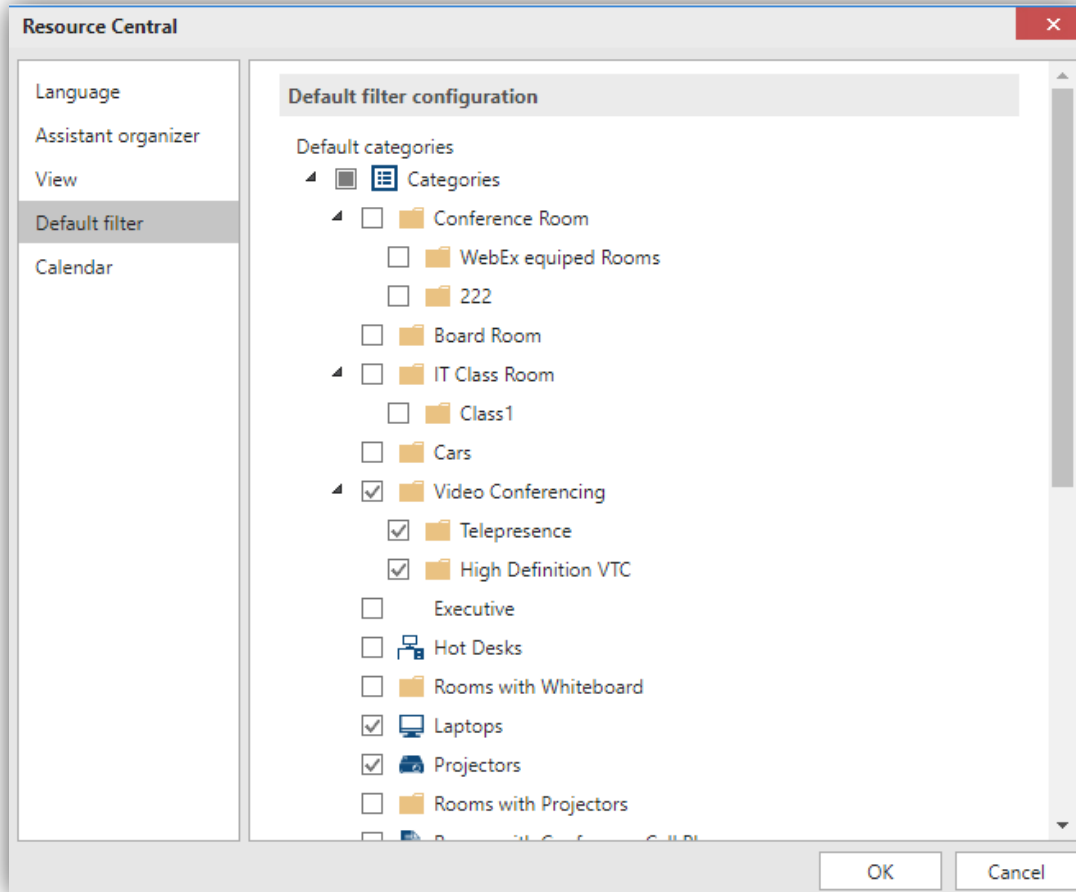


Figure 28. RF Settings – Default filter

First day of the week

You can change which day will be the first day of the week via ResourceFinder **Settings** → **Calendar**. Simply select your preferred day and click **[OK]**.

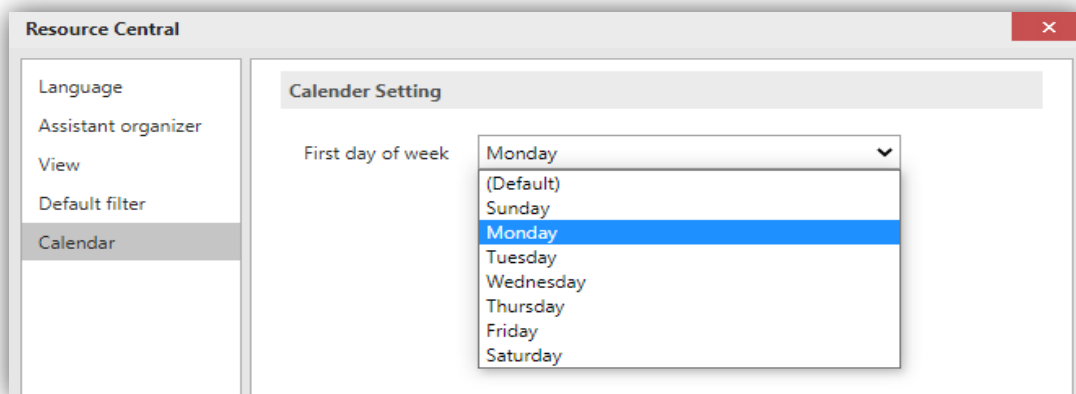


Figure 29. RF Settings – Calendar

CHAPTER 7.

Create a meeting with Pooled Resource.

A Pooled Resource is displayed like any other resource, but the difference is that it can be booked multiple times. Typically, used for a group of desks where the organizer can book a desk from a pool of desks - not a specific desk. Parking places can also be an example of resources that can be grouped into one.

When using Pooled Resources license type the capacity is what determines how many times the resources are available in the pool.

You can use the Resource Finder to find and book, for example, the office desks either by searching through filter options, default location or by using Floorplans.

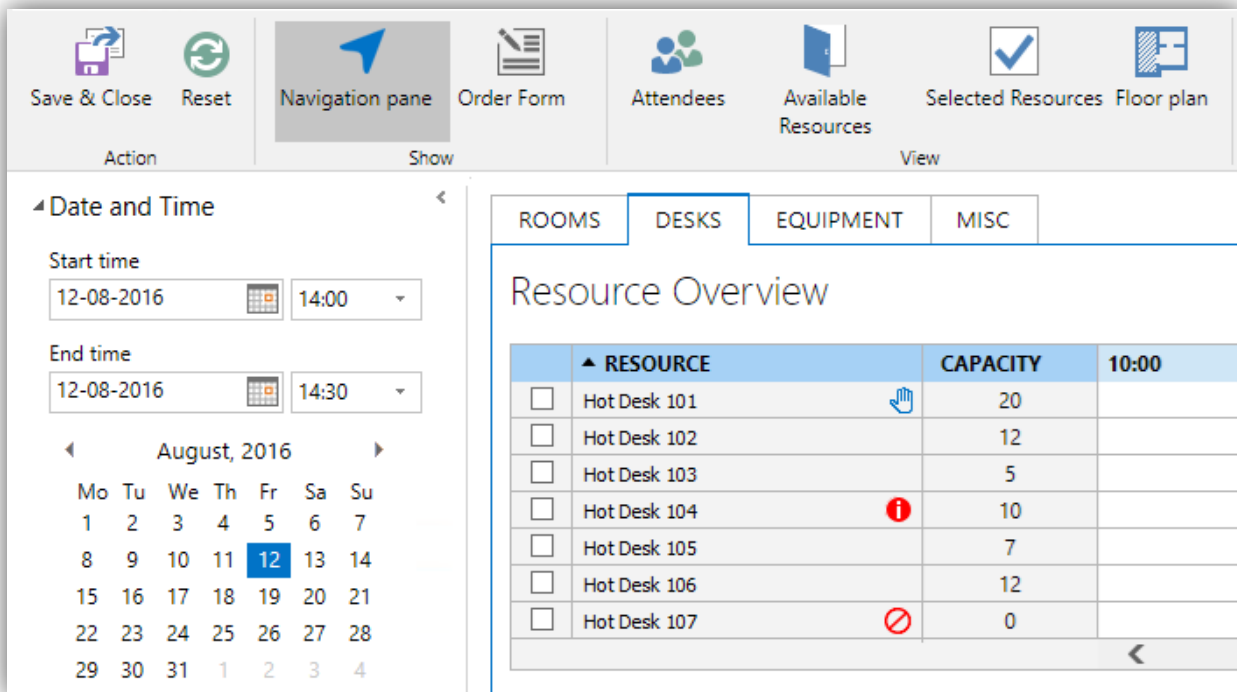


Figure 30. Selecting a pooled resource

Adding attendees to the meeting invite will allow you to book for several of your colleagues at a time.

The number in the bracket shows the total available capacity for that resource and not the available capacity at that specific period. Resource Finder will block you if you exceed the available capacity at the time you try to book.

NOTE: If the capacity is violated either when organizer uses native Outlook to book excessive capacity, the organizer will receive a decline email from Exchange on that resource reservation.