



Add-On Products

Resource Central

Outlook Add-in User Guide

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Add-On Products
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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

Create a new meeting request in your Outlook calendar using the Resource Finder Add-in. Open the Resource Finder or start by filling in all the needed information for your meeting – such as:

- Subject
- Time slot
- Attendees
- Agenda

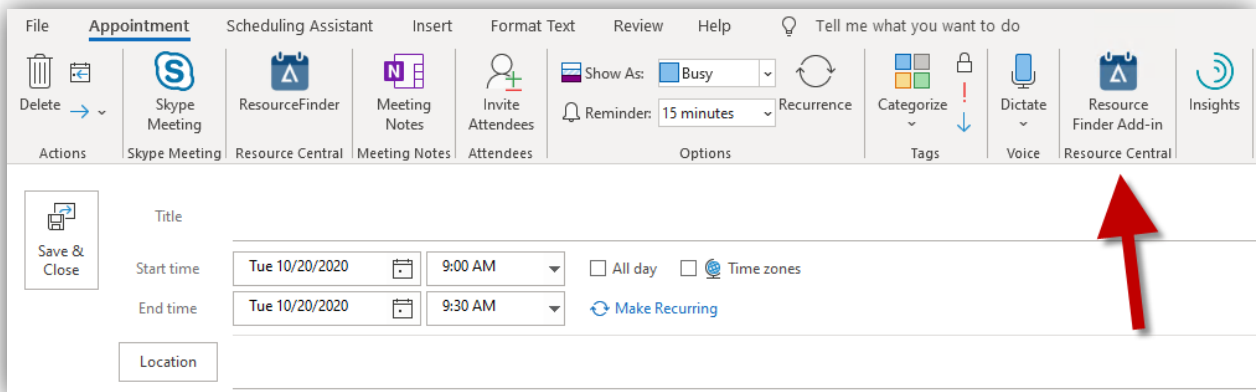


Figure 1. Room Booking - Outlook Desktop

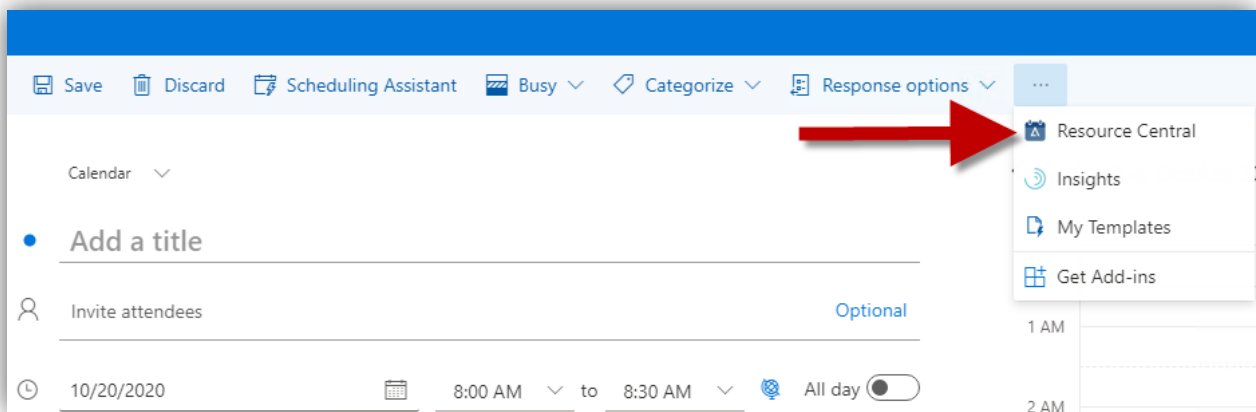


Figure 2. Room Booking - Outlook on the Web

NOTE: For better illustration, the Outlook desktop client will be used (instead of Outlook on the web) to describe all functionalities.

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

CHAPTER 2.

Use ResourceFinder to find a meeting room

The RF Outlook Add-in will help you, easily and intuitively, locate the meeting rooms, which will suit your needs.

Normal bookings

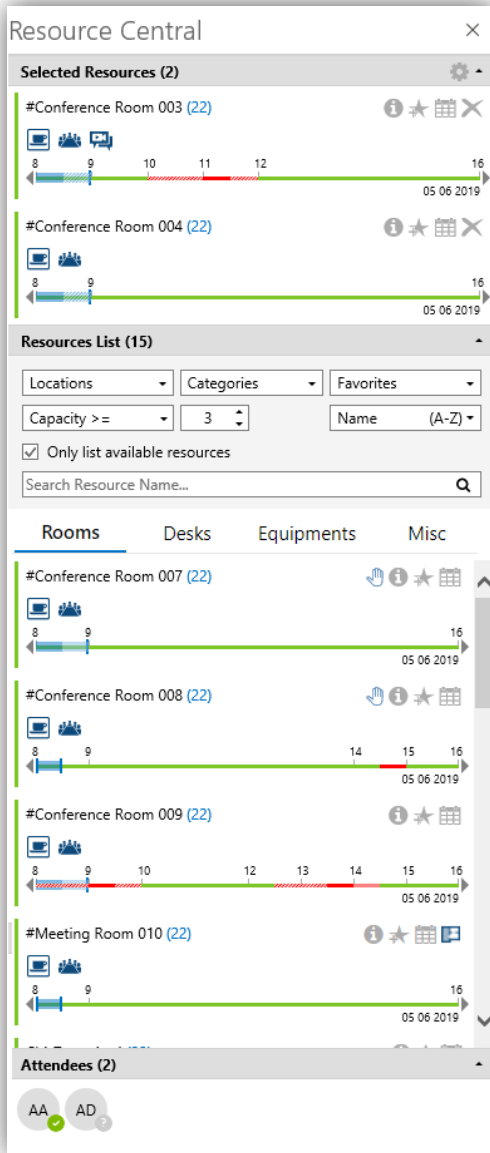


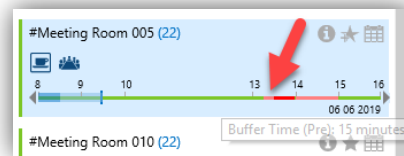
Figure 3. ResourceFinder Add-in

Control buttons:

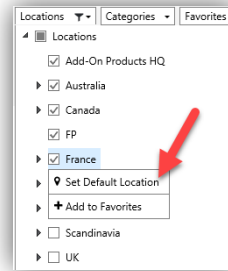
	Open Settings
	Booking this resource requires approval by the resource's delegate. Your request will be forwarded, pending approval.
	You cannot book this resource because your meeting request conflicts with the resource's booking policies.
	You do not have permission to book this resource.
	You can 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.
	View Resource Details
	Add Resource to My Favorites
	View Calendar
	Show Floorplan
	Remove the resource

If the resource list on the screen does not include the resource that you are looking for, click [**List more Resources**] to have more resources displayed in the list.

On the availability timeline for each resource, you can see the buffer time displayed as a shaded line:



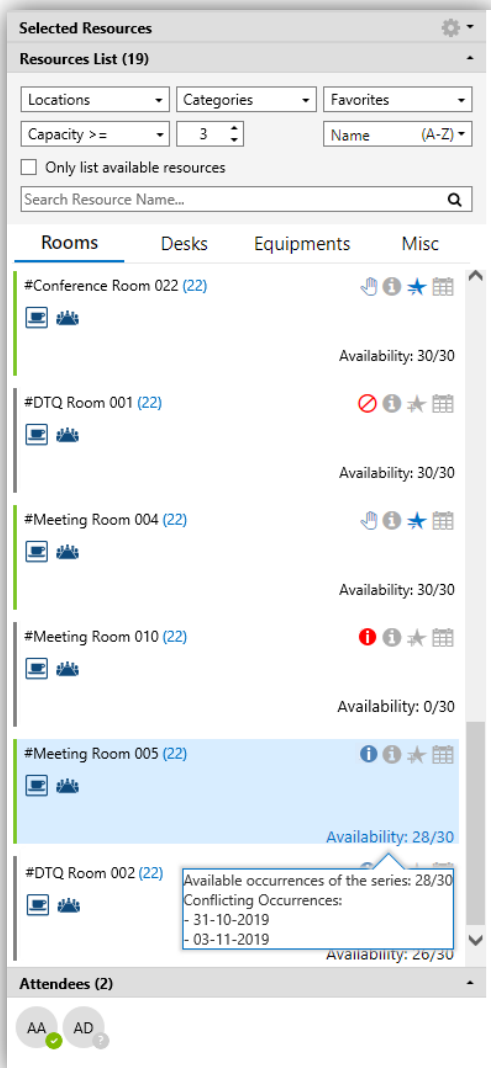
In case you often look for resources in a certain location, you can set a default location to save time. To do that, right click on a location that you want to set as default, select **[Set Default Location]**.



1. Use the **Resource List** to find a meeting room. You can filter the available room based on the Locations, Categories, Capacity, etc., saving you time when searching for the right room.
2. The **availability** of the meeting rooms will be displayed on each resource in the list.
3. Please note the **categories** attached to the selected resource (icons under the resource name).
4. To select a room, you click on it from the resource list.

Recurring bookings

In case you book a recurring meeting, the availability is displayed as in the following figure:



Availability: The availability ratio is displayed when you book a recurring meeting. This will be further explained below.

Apart from the ratio (highlighted in red), there are vertical bars on the left of the panel showing if the resource can be booked or not.

In the example, “Availability: 29/30” means that you are going to book a recurring meeting of 30 occurrences, and 29 of which do not have conflicts.

The green vertical bar shows that the resource can be booked for your recurring meeting. The red vertical bar shows that the resource cannot be booked because the booking does not comply with the resource booking policies and would be declined by Exchange.

If you click on the text ‘Availability’, more detailed information will be presented.

Figure 4. Book a recurring meeting

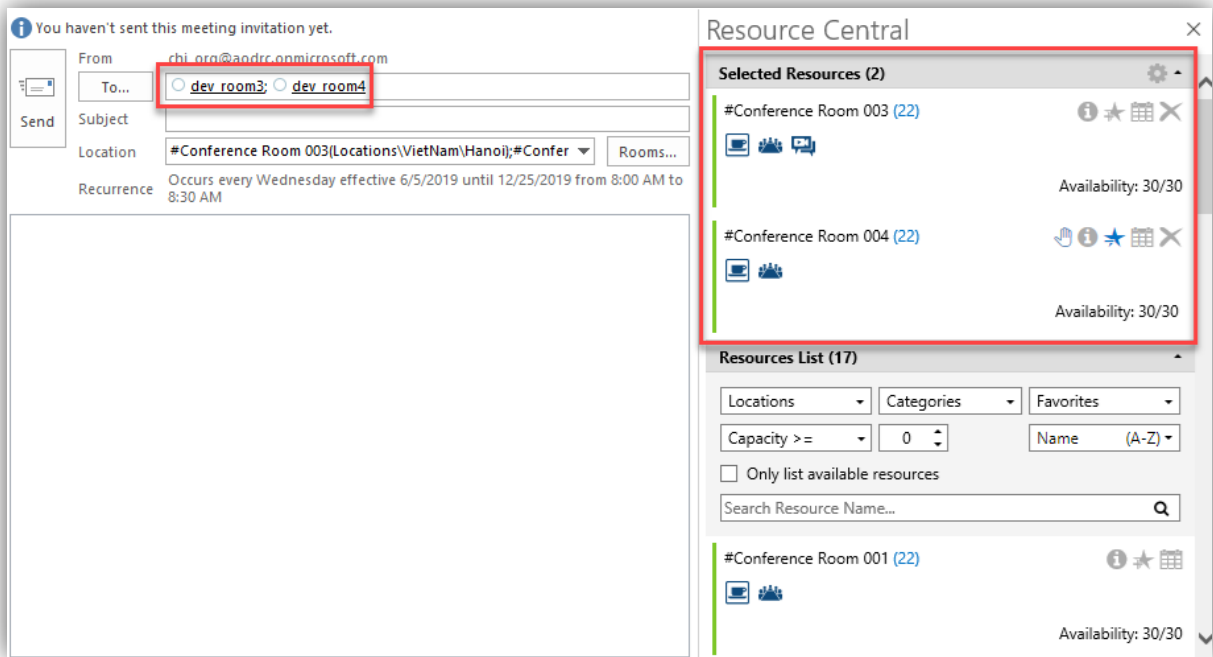

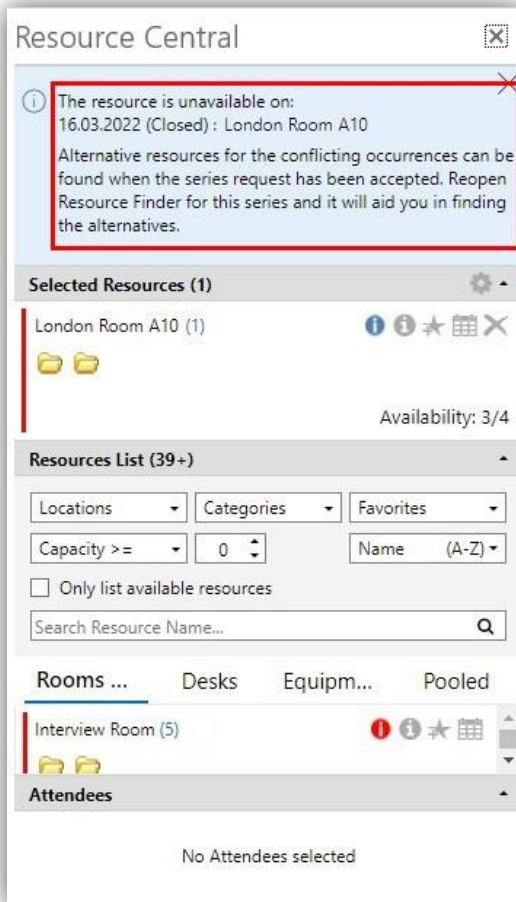


Figure 5. Selected rooms in ResourceFinder

Selecting a room will move the room to the outlook appointment and to the selected resources area of the add-in.

Booking alternative resource for recurring meeting

When you book a conflicted resource, you will see the  icon with the following message:



The message warns you about the dates that have conflicts. These conflicts can be replaced by using ResourceFinder after the Series has been approved – meaning after you have sent the meeting invite and Exchange has sent you the acceptance email for your booked resource.

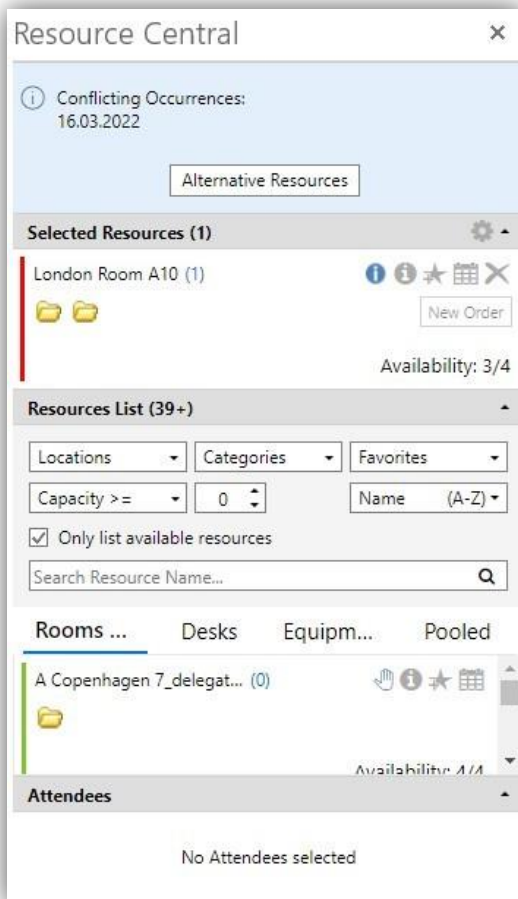
Aside from the acceptance email from Exchange, you will also receive 'Cancelled Reservation' email(s) that inform you about the specific date(s) that is conflicted, i.e.:



To start selecting alternative resource, reopen the series. It will prompt an 'Open Recurring Item' message, in which you choose 'The entire series', and click [OK].

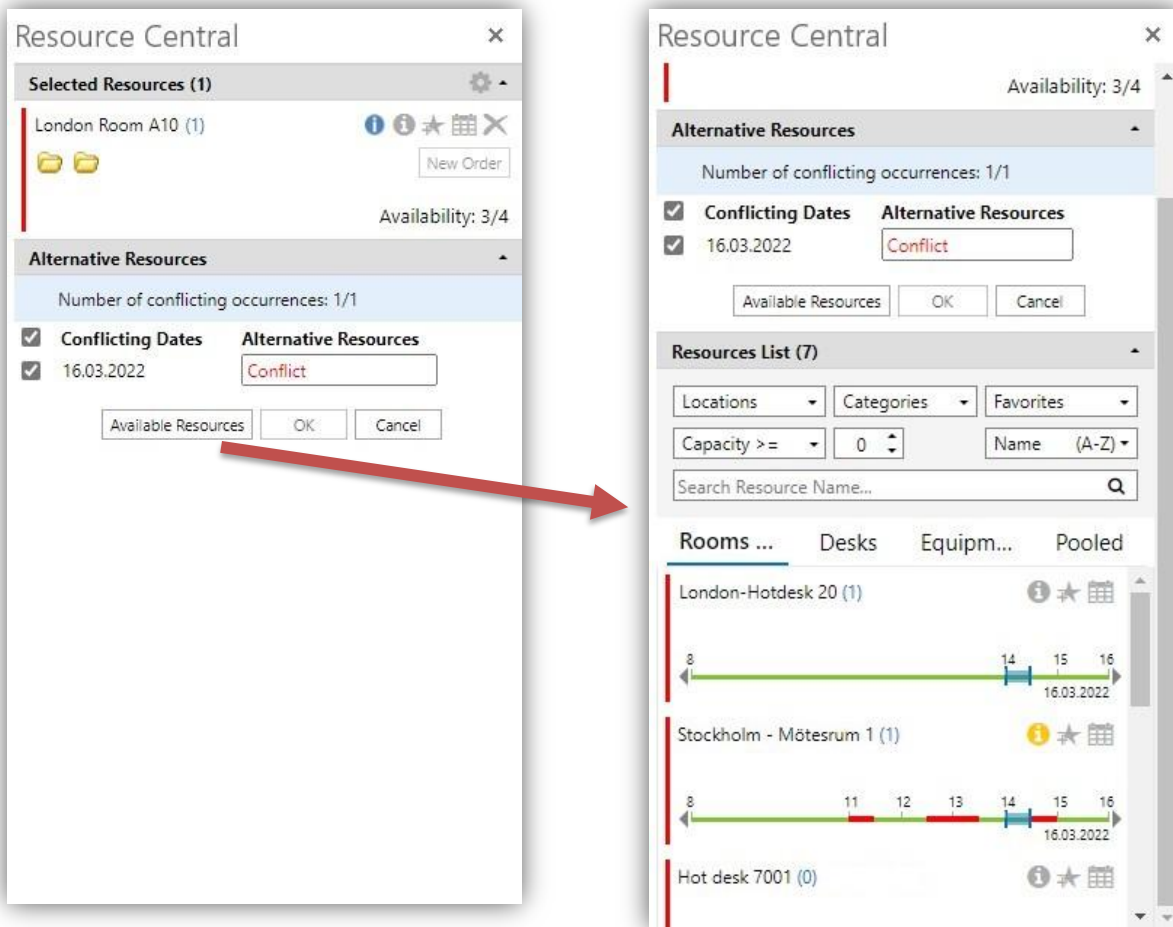


On Meeting Series panel, open Outlook ResourceFinder Add-in again. You will now see [**Alternative Resource**] button:



Notice that it shows conflict dates but there is no resource next to it.

Click the button to open Alternative Resources section. Here you can select conflicting dates then click **[Available Resources]** to select different resources for those dates:



Once you have selected alternative resource, click **[OK]** on Alternative Resources section. You will then see a new message as example below:



If you still need to change resource, click **[Alternative Resources]** to bring back the alternative resources panel.

If you are done, click [**Send**] to register your chosen alternative resources in Resource Central.

Then you will see that the conflicted dates are now registered with a new resource:



Be aware that once you click [**Send**], conflicting dates that are registered with alternative resources cannot change resource again. Clicking [**Alternative Resources**] button only let you change resource for conflicting dates that still do not have alternative resource.

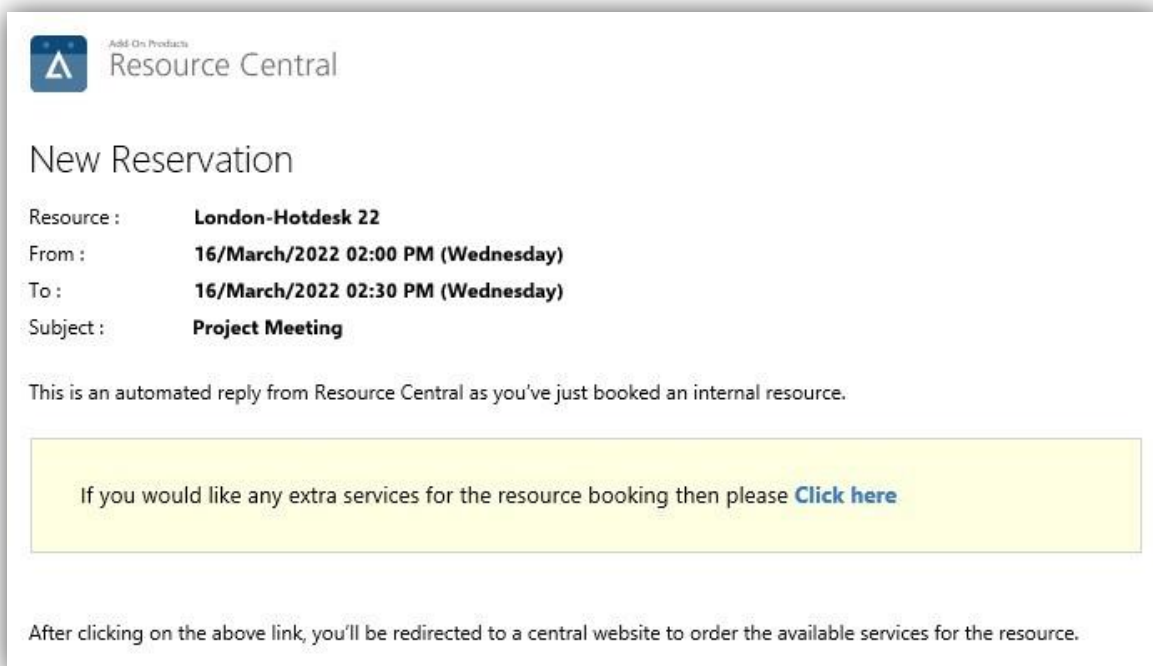
NOTE 1: If your new selected resource is still not fully available, it only changes resource for dates that are not conflicted with that new one. You have to select another resource for remaining dates that are still conflicted.

Finally, close your Meeting Series window.

If there is message asking you what to do with this meeting request, choose '**Don't save changes**' then click [**OK**].

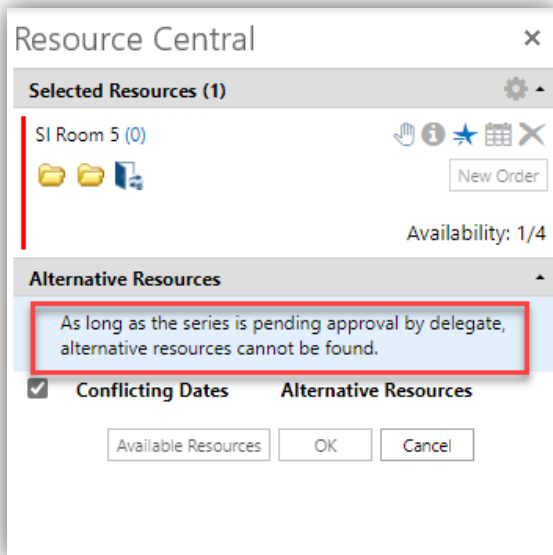
NOTE 2: This feature does not work if the meeting has multiple resources selected.

Afterwards, you will receive another email confirming your new alternative resource for that conflicted date, i.e.:



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.

Floor Plan

When booking a resource, it is useful if you can navigate to the resource and see the floor plan on the screen. The Floor plan feature is created to serve that purpose.

This function is controlled by the parameter **ResourceFinder.FloorPlan**. For more details about this parameter, please refer to **RC Parameter Guide**.

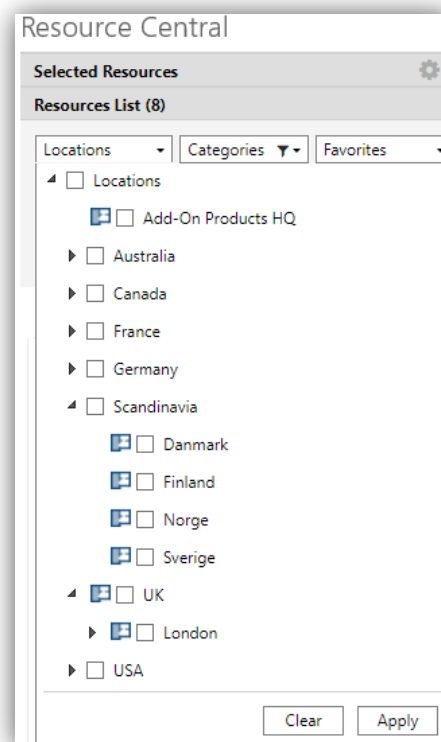


Figure 6. Floor plan enabled

When it is enabled, you can see the **[Floor plan]** icon  adjacent to each location and on each resource (that has attached floor plan). Click on it, the **Floor plan** section is shown in a separate window:

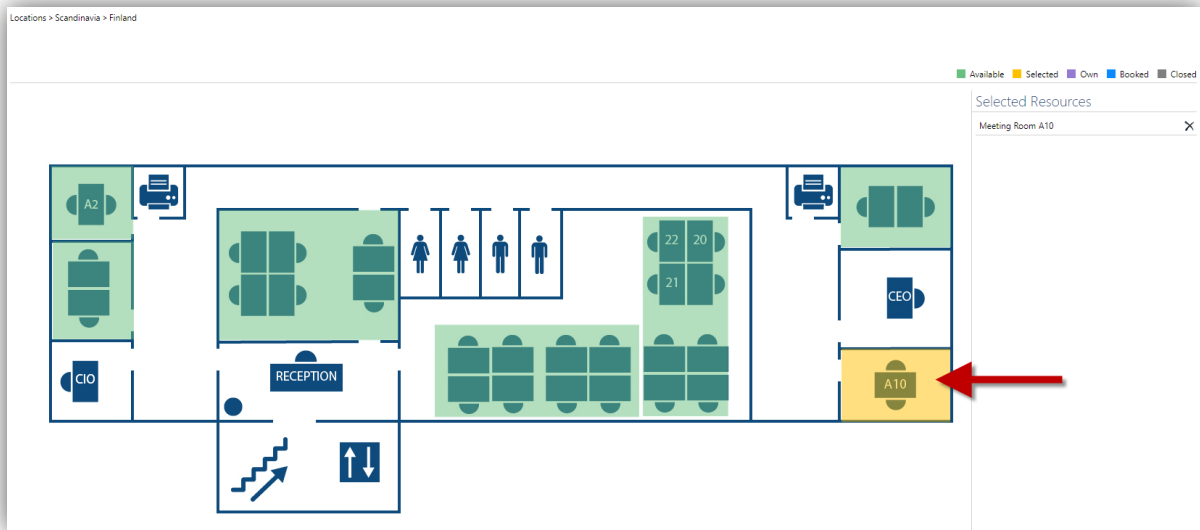


Figure 7. Floor plan display

From the floor plan, you can click on a resource, and this resource will be selected for the booking.

CHAPTER 3.

Invite Attendees and complete your meeting request.

At any time, you can add attendees to the meeting and the Resource Finder add-in will adjust.

The number of attendees you add to the meeting will directly make an impact on room search: the room capacity in Filter section is automatically changed according to the number of added attendees including the organizer:

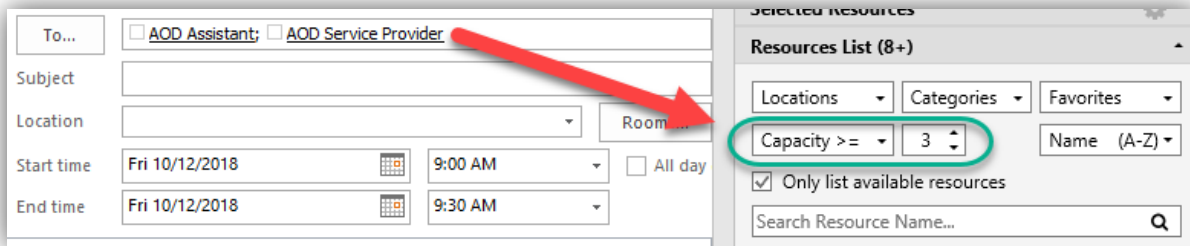


Figure 8. Attendees – filter capacity

Attendees of the meeting are displayed at the bottom of the **ResourceFinder Add-in**.

The color code shows the availability of the attendees, in which red means that they are unavailable in the selected meeting time and green means that they are available.



Figure 9. Attendees list

Clicking on an attendee's name will open its calendar as shown in the following figure, on which you can check the attendee's availability for the meeting:

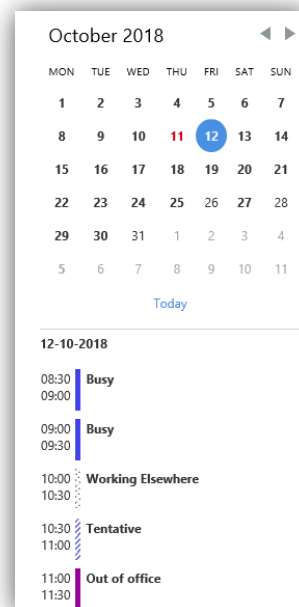


Figure 10. Attendee's calendar

You need to click [**Send**] button in order to finalize the meeting request.

i You haven't sent this meeting invitation yet.

Send

From: dct@aod.vn

To...: # Fitzroy Gardens - FT - Lawn 12 <dev_room2@aodo365.onmicrosoft.com>

Subject:

Location: # Fitzroy Gardens - FT - Lawn 12 Rooms...

Start time: Thu 9/20/2018 2:00 PM All day event

End time: Thu 9/20/2018 2:30 PM

Figure 11. 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

Ordering services for your meeting can either be done by using the new reservation email or by using My Meetings

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

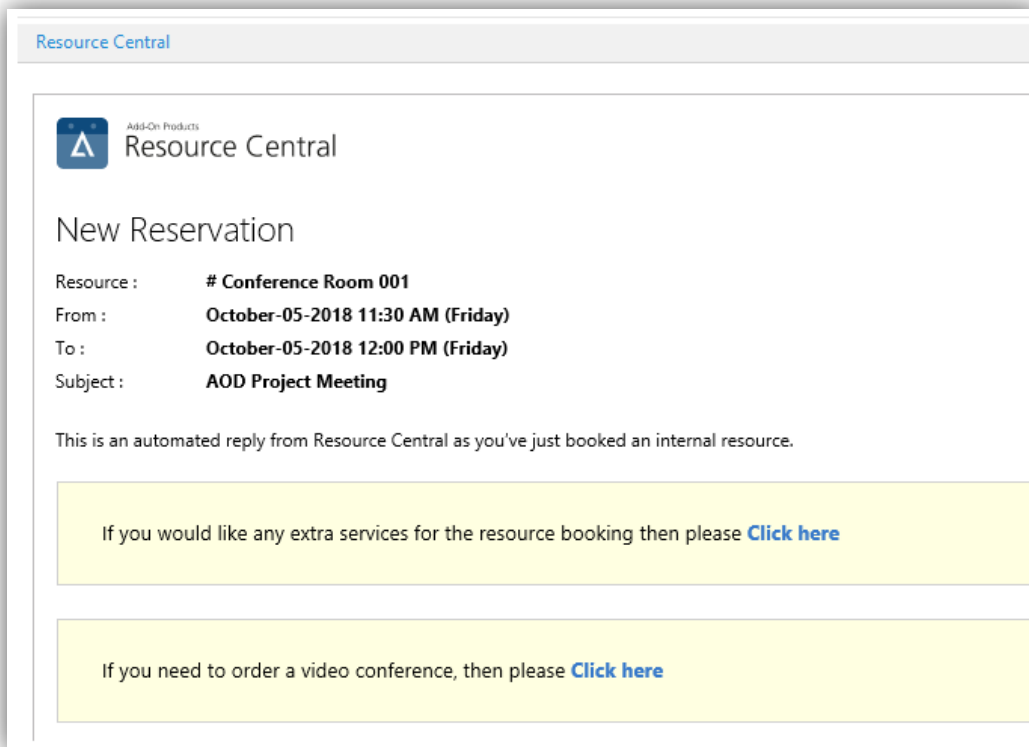
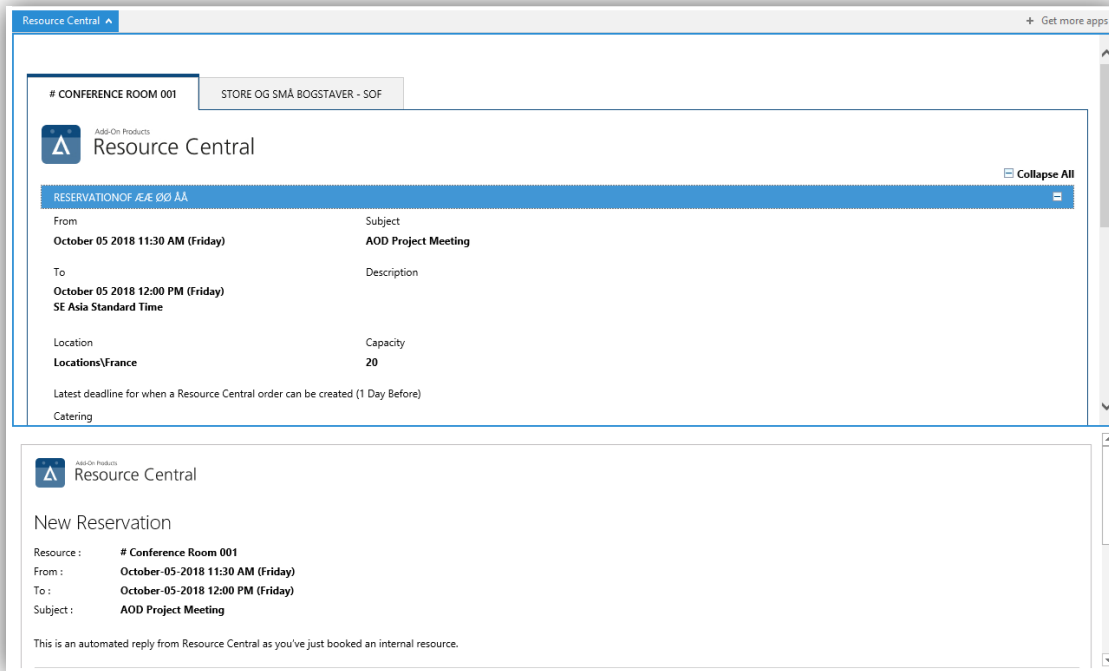


Figure 12. Open Order Form

When you click on the button 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.

You can also open the same order form in **My Meetings** to order services for the meeting.

Another way to open order form is to click on [**Resource Central**] button on the upper left corner of the email body (not available for Outlook on the web). This will open the order forms as in the following figure and you can make orders directly from this order form:



If you want to book orders for the meeting using Outlook Add-in, open that meeting in the calendar, click [**Resource Finder Add-in**] button (in Outlook desktop) or **Edit** → [**Resource Central**] button (in Outlook on the web), the meeting details with selected resources are displayed:

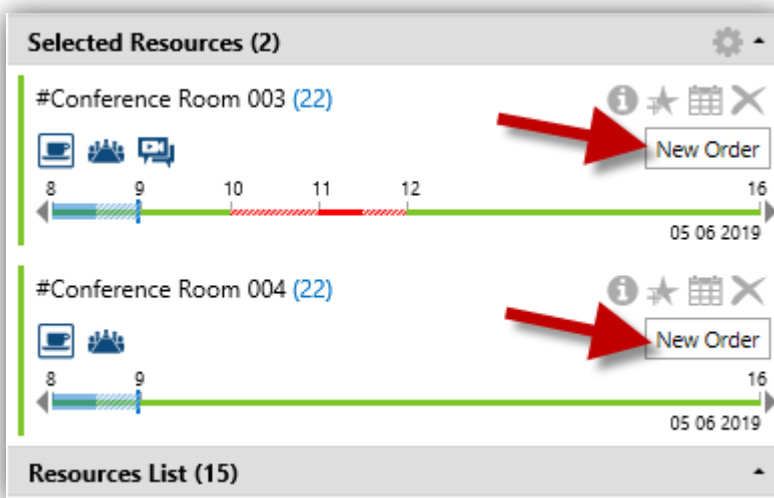


Figure 13. Book new order in Outlook Add-in

Click [**New Order**] button and the Order Form is opened in a new window.

NOTE: For recurring meetings, booking order for the whole series is not supported. You can only book order for each instance.

Order Form

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

Resource Central
[Collapse All](#)

RESERVATION OF CONFERENCE ROOM 002

From: October 12 2018 4:00 AM (Friday) **Subject:** AOD Project Meeting

To: October 12 2018 4:30 AM (Friday)
 Romance Standard Time **Description:**

Location: Locations\France **Capacity:** 20

Latest deadline for when a Resource Central order can be created (1 Day Before)

Catering:
 9:15 PM
 Extra services:
 10:30 PM

ORDER DETAILS

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

Name	Price	Qty	Quota
Cacao	0.00		335
<input checked="" type="checkbox"/> Common Breakfast	3.21	Min. Qty: 4	
Fruits mélangés	6.00		0
Café	3.00		0
The	3.00		0
Eau	3.00		0
Chocolat	2.00		0

Shared Order Form
[Collapse All](#)

RESERVATION DETAILS

Subject: AOD Project Meeting

From: October 05 2018 11:30 AM (Friday)

To: October 05 2018 12:00 PM (Friday)

ORDER DETAILS

Region

Your Region cannot be determined - please specify:

Meeting Rooms

Conference Room 001 (dev_room41@aodrc.onmicrosoft.com)

Comment

QFORM

Phone:

Laptop:

City:

Figure 14. Order Form and Shared Order Form opened from [Click here] button

Figure 15. Recurring meeting Order Form opened from [Click here] button

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.

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

Order Confirmation

After placing the order you will 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

In Outlook® you have another Icon in your toolbar named **My Meetings**. 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 or create new orders.

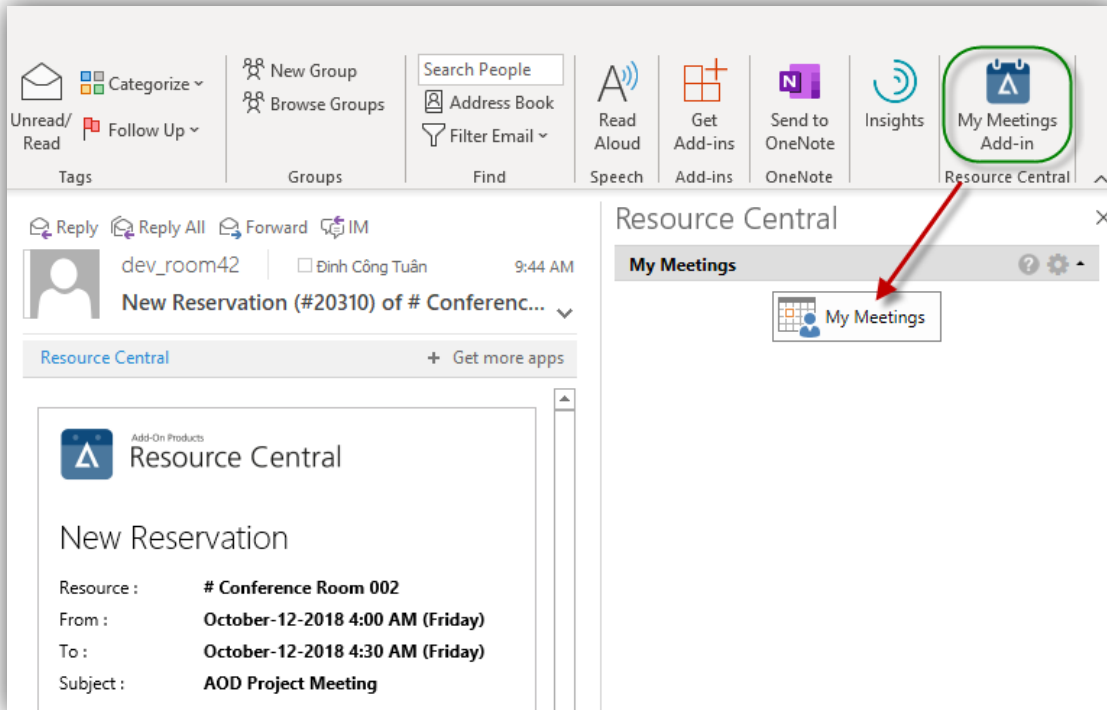


Figure 16. My Meetings

My Meetings is accessible:

1. When you open an email, and the My Meetings icon is available on the ribbon of that email.
2. When you stand in your Outlook inbox. Then you can see that My Meeting is accessible from Outlook's® main panel (this requires **Reading Pane** is turned on. You can do this by navigating to **View** tab → **Reading Pane** → select **Right** or **Bottom**).

Click on [**My Meetings Add-in**], and from the opened add-in panel click [**My Meetings**] button.

For Outlook on the web, My Meetings is accessible when you open an email, click [**More actions**] button, scroll down and select [**Resource Central**] as in the following figure:

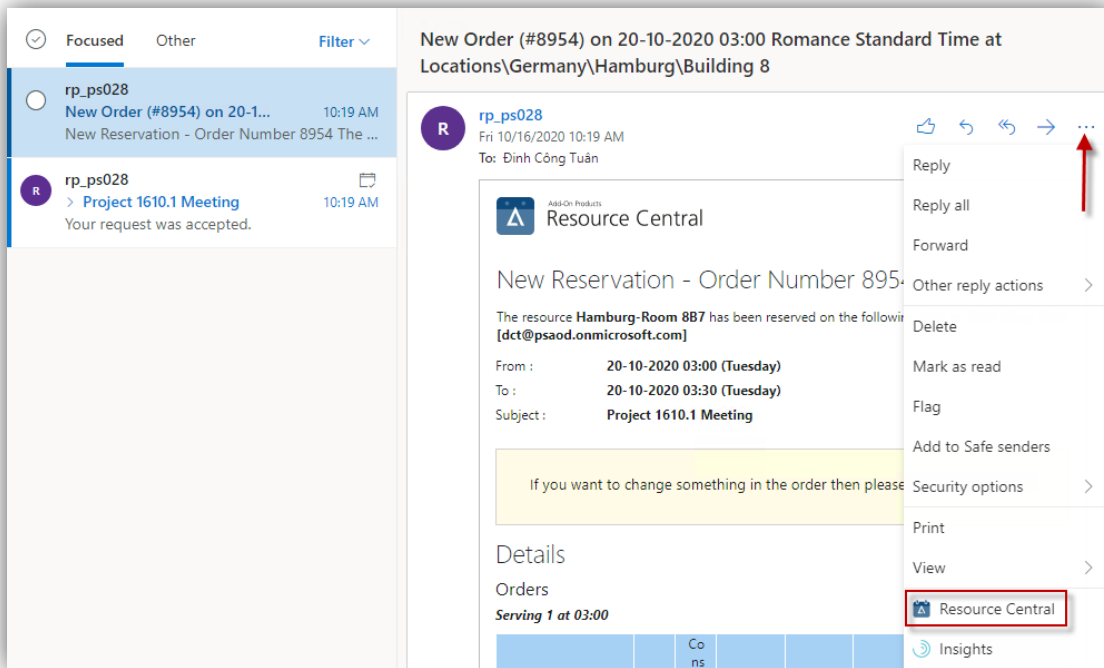


Figure 17. My Meetings in Outlook on the web

Another panel is opened after you click [Resource Central] from the menu. In this panel, [My Meetings] button is available. Click the button to open My Meetings window from Outlook on the web.

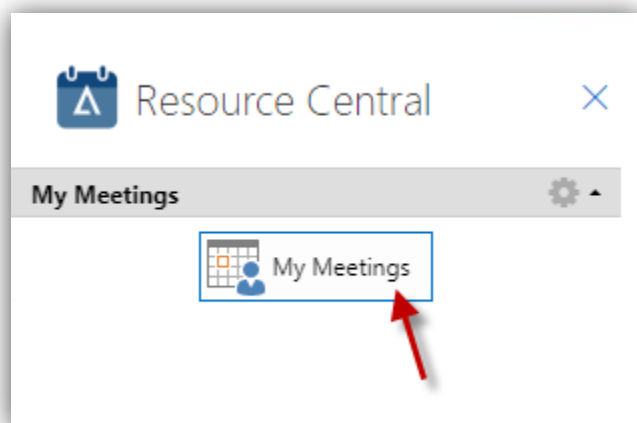


Figure 18. Open My Meetings

My Meetings navigation

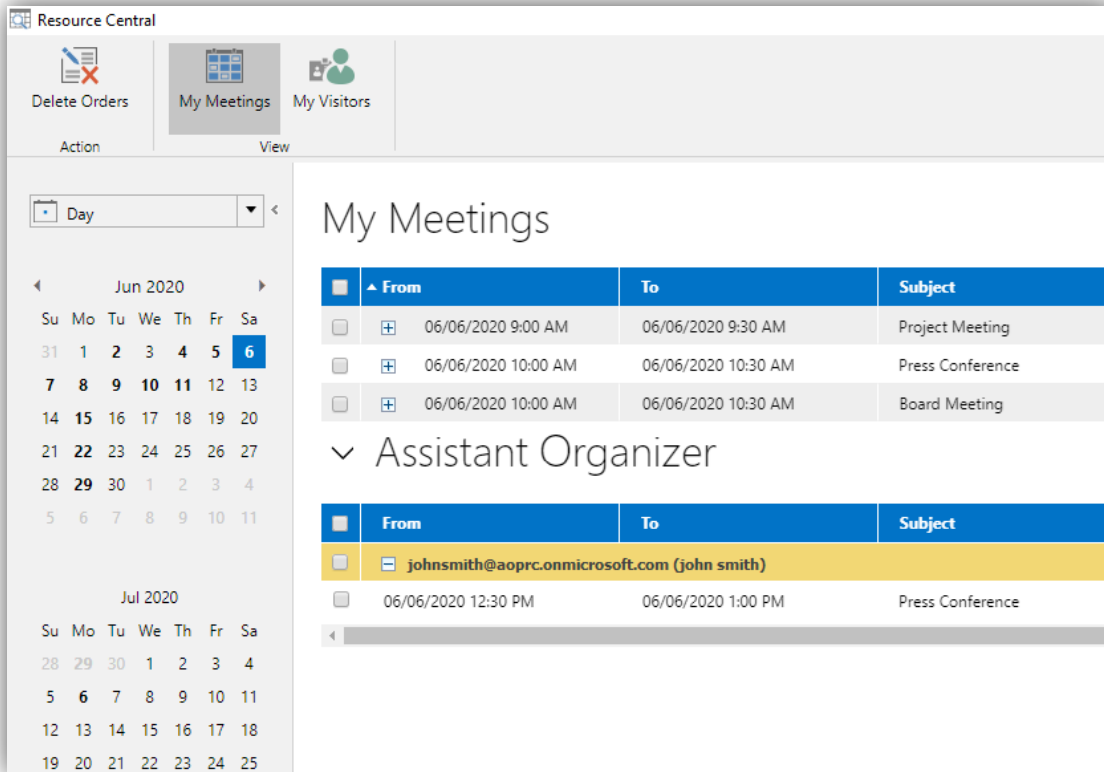


Figure 19. My Meetings Navigation

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 which has been selected.

From here an order can be changed, created or deleted just by clicking any of the listed meetings.

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.

Click on **[Order Status]** to see status of the order you selected.

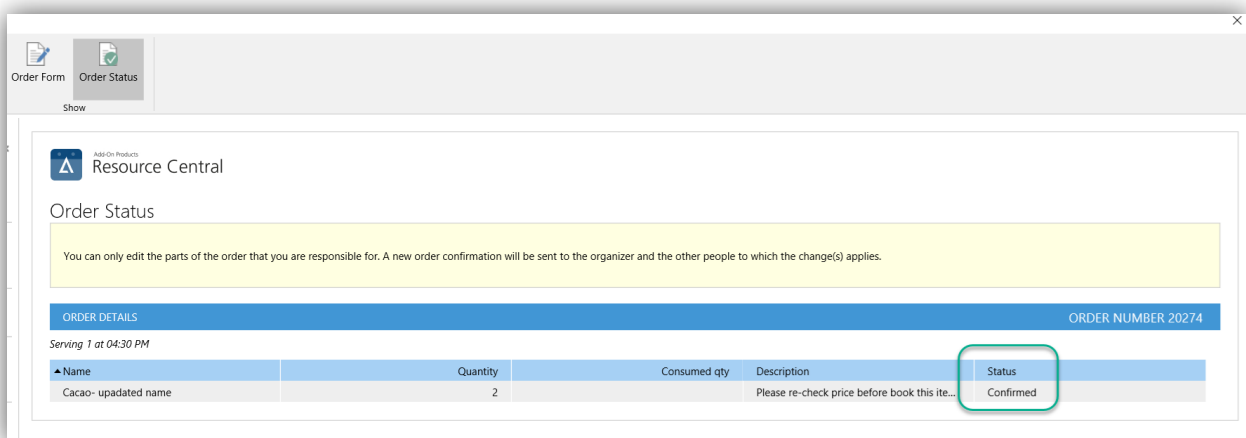


Figure 20. Order status

Deleting Order associated with Meeting(s)

You can delete one or more order(s) associated with meetings in **My Meetings** window by selecting the checkbox against one or more meetings and clicking the **Delete Orders** button.

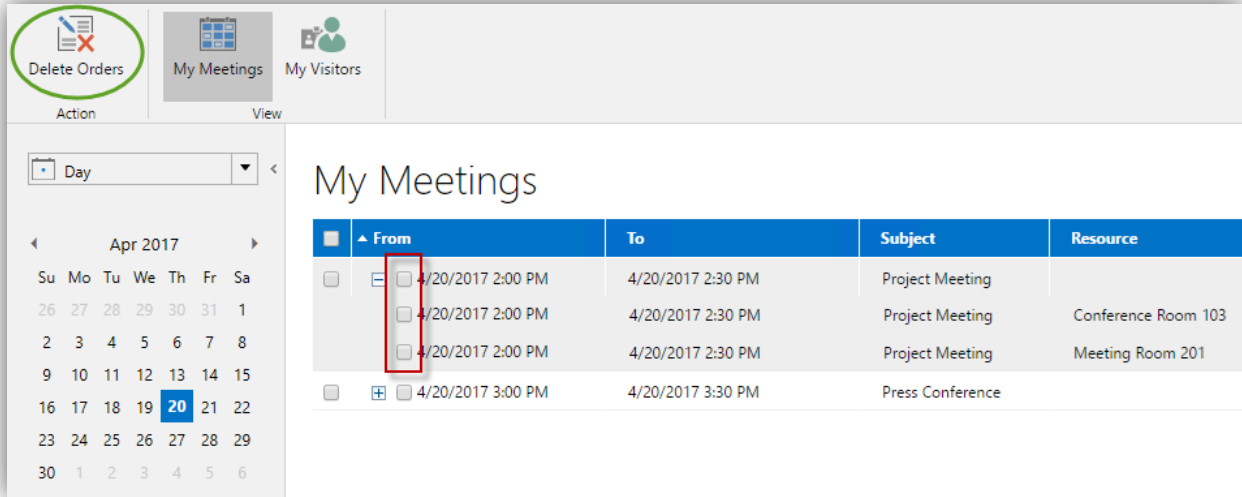


Figure 21. Delete Orders Button

Cancelled Order Email will be sent to meeting organizer and all persons related to the order. Also, the Check symbol (✓) against that reservation for the **Order** column would also be removed.

NOTE: Those Servings in the order of a reservation in which any of the Item(s) has status = Arranged and/or Locked, will not be deleted from the system. Only those Serving(s) in which the Item(s) have status = New, Changed, Confirmed or Declined, would be removed from the selected meeting(s) and corresponding Cancelled Order emails would be sent to the relevant stakeholders.

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:

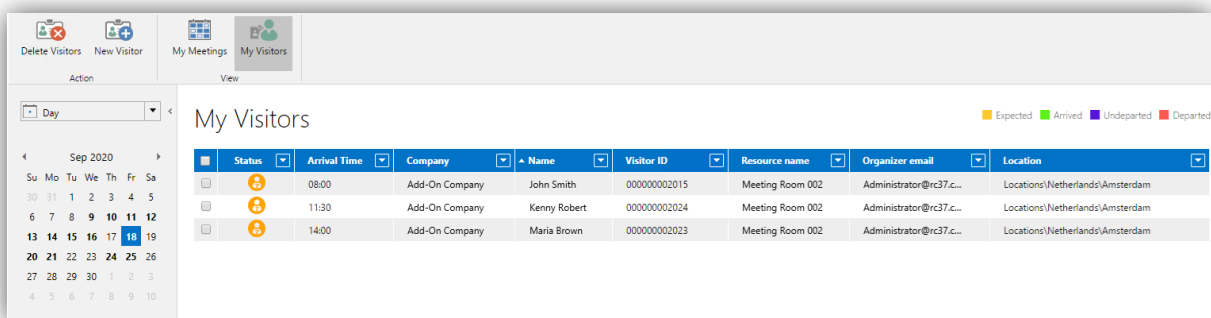


Figure 22. My Meetings – Visitors list

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

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

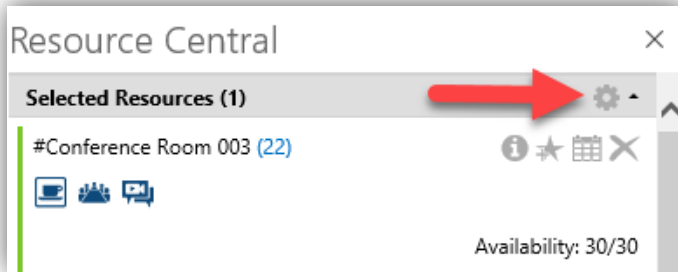
The screenshot shows the 'Visitor Details' form. At the top, there is a navigation bar with 'Back', 'Save', and 'Save & New' buttons. Below this is a calendar view for September 2020, with the 18th highlighted. The main form area contains the following fields:

- Arrival Date:** 18/Sep/2020, 04:37 AM
- Title:** [Empty text box]
- Email:** [Empty text box]
- Company:** [Empty text box]
- Visitor Type:** A dropdown menu with 'Reservation' (highlighted) and 'Person' options.
- Visitor Id:** [Empty text box]
- * Name:** [Empty text box]
- Cell. / mobile number:** [Empty text box]
- Category:** [Empty text box]
- * Meeting:** [Empty text box with a blue '...' button]

Figure 23. Add a visitor to a meeting/person

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

CHAPTER 6. Add-in Settings



From the main screen of ResourceFinder or in My Meetings, you can open **Add-in Settings** by clicking on the cogwheel icon at the upper right corner.

In **Settings** panel, configurations for language, assistant organizer function and datetime format can be made.

Language Setting

You can make configurations for Language to be used in ResourceFinder by clicking on the [**Settings**] icon at the upper right corner of the interface. The following panel shows up:



Figure 24. Settings – Language

Click [**Apply**] to finish.

Assistant Organizer

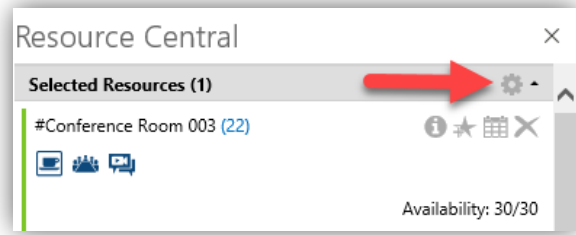
In order to enable other organizers like secretaries or Personal assistances to book meetings and place orders in RC on behalf of other organizers, Resource Central provides an additional feature, namely “**Assistant Organizer**”.

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

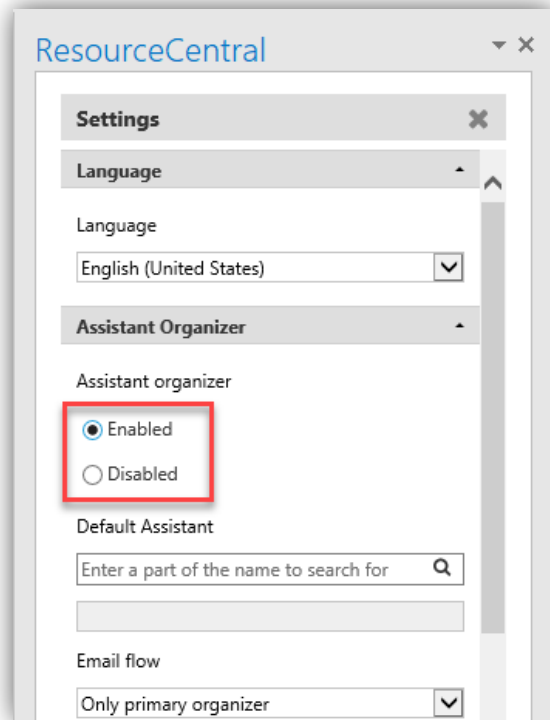
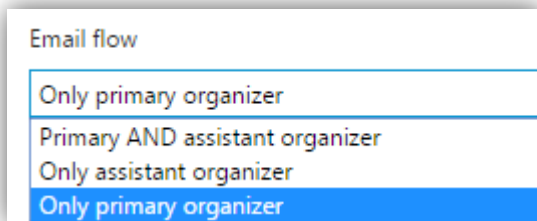
If this function is enabled by the parameter, the icon Assistant is not available in the **ResourceFinder** → **Order Form**. It is only available after the function is enabled in **ResourceFinder Settings**.



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

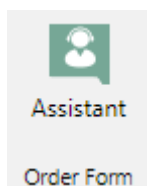
Under Default Assistant, you can setup an assistant organizer that will be used as standard on all your orders. E.g. if all your meetings are always handled by the same assistant.

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

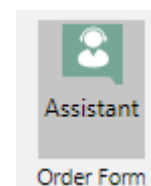


After clicking [**Apply**], the icon **Assistant** is available in **ResourceFinder** → **Order Form**. But it is only applied to the booking if you click on it

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:

Assistant organizer: ...

Email to: Organizer Assistant organizer

Figure 25. 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 is the assistant 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:

My Meetings

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

Figure 26. My Meetings opened by Primary Organizer

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

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@aoprc.onmicrosoft.com(john_smith)								
19-May...	19-May...	Project Meeting	Meeting Room 202	Locations	john_s...	sensi_h...	✓	✓

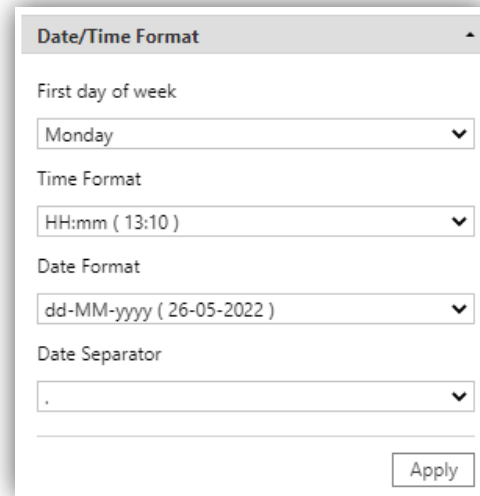
Figure 27. My Meetings opened by Assistant Organizer

Date/Time Format

You can also set up date/time format in Settings panel.

Go to Settings and roll down to the bottom of the panel, you will see the Date/Time Format section.

Select your preferred First day of week, Time Format, Date Format and Date Separator, then click **[Apply]** to finish.



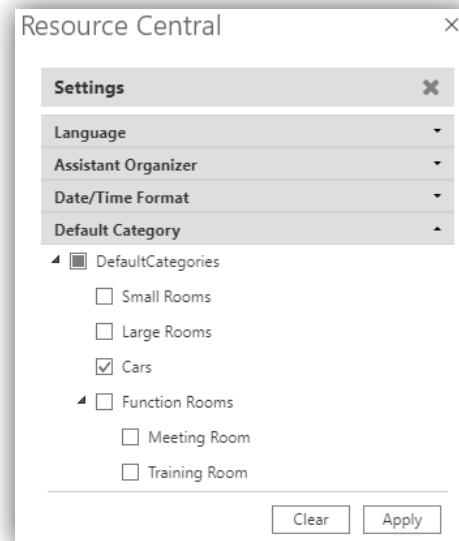
The screenshot shows the 'Date/Time Format' settings panel. It contains four dropdown menus: 'First day of week' set to 'Monday', 'Time Format' set to 'HH:mm (13:10)', 'Date Format' set to 'dd-MM-yyyy (26-05-2022)', and 'Date Separator' set to '.'. An 'Apply' button is located at the bottom right.

Default Category

In this section, you can set up default categories to be displayed when opening Outlook Add-in.

Go to Settings and roll down to the bottom of the panel, you will see the Default Category section.

Select your preferred default categories, then click **[Apply]** to finish.



The screenshot shows the 'Resource Central' Settings panel. The 'Default Category' section is expanded, showing a list of categories with checkboxes: 'DefaultCategories' (checked), 'Small Rooms', 'Large Rooms', 'Cars' (checked), 'Function Rooms', 'Meeting Room', and 'Training Room'. 'Clear' and 'Apply' buttons are at the bottom.

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.

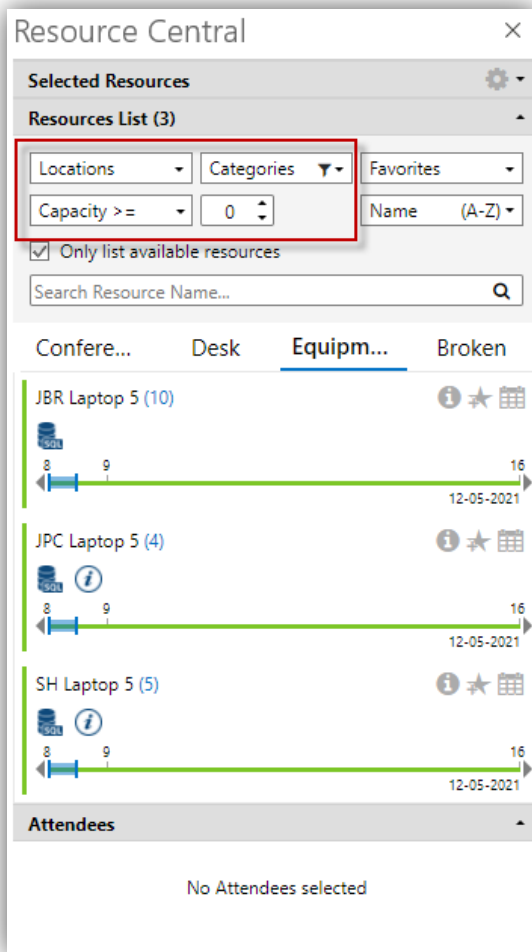


Figure 28. Selecting a pooled resource

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.