Add-On Products
Resource Central

Service Provider Guide

For RC 4.3

Document Revision 07

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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.

Login for service provider

Service provider users log into 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 log in please use the hyper-link which you have received from your IT administration that could look like this: http://Intranet/ResourceCentral/Admin/

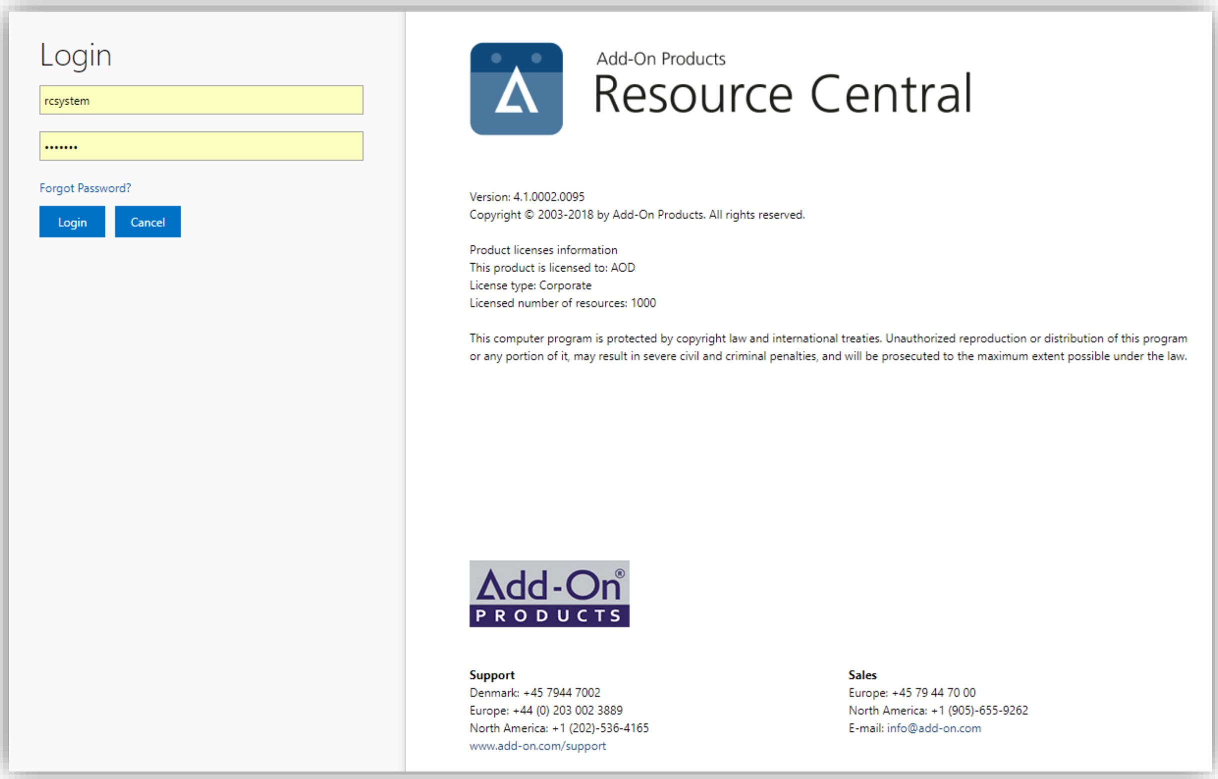


Figure 1. Resource Central Login Page

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

CHAPTER 2.

Daily tasks for Catering Roles

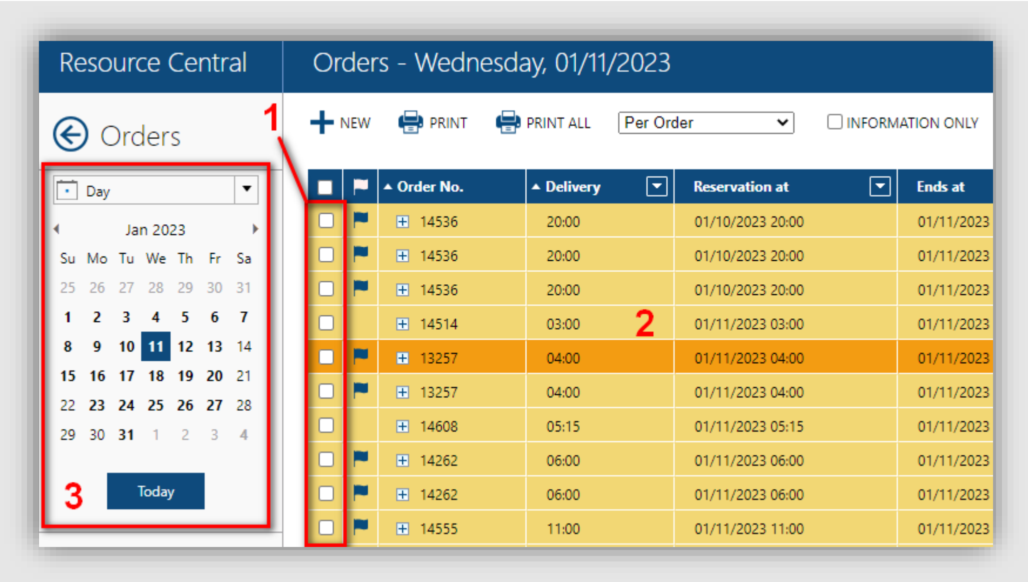
The daily tasks section consists of the following areas:

- 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 the person, then this person will not be able to view any orders (records) in this view.



1. Checkboxes used for selecting orders

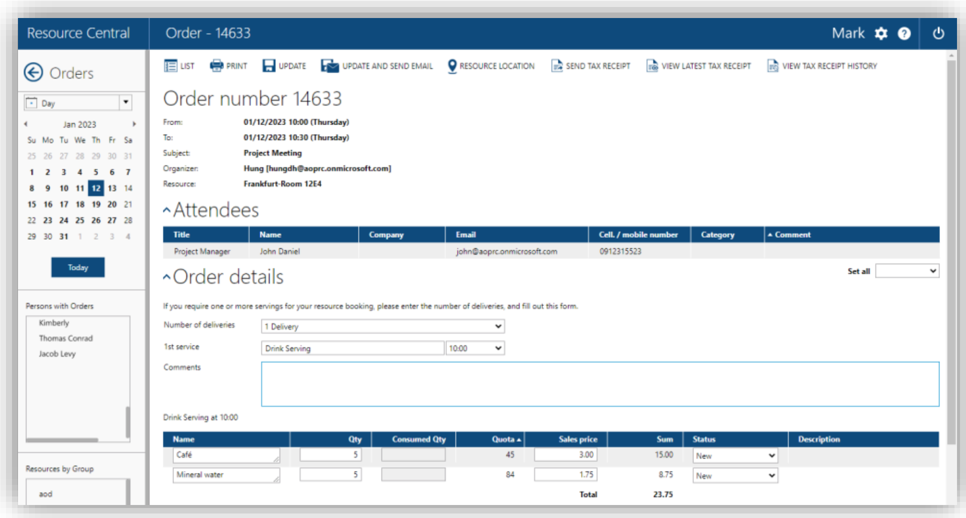
2. Click on the order line to view details

3. Select other dates to view from the Date Picker

Figure 2. **Order List**

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

- **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

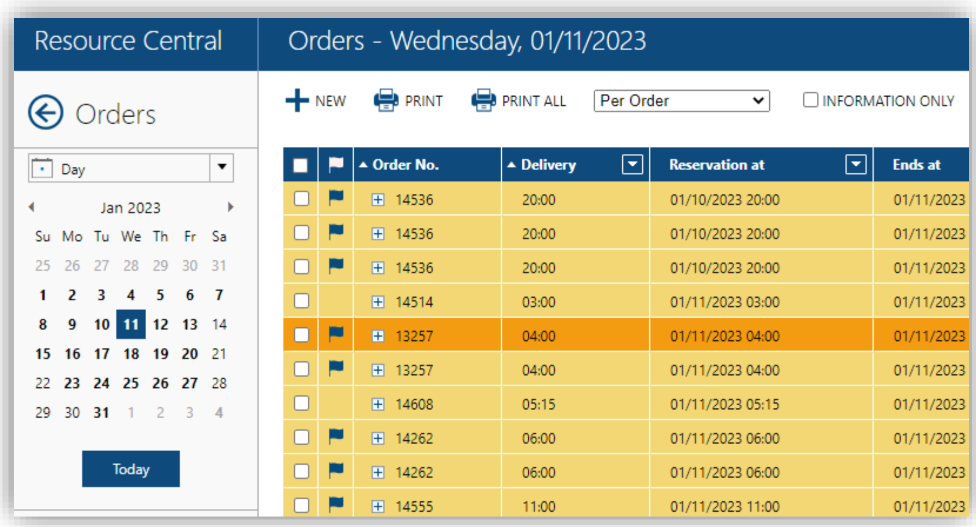
In the order detail view, there are options to change the order and item status.

After changing the order and item status, you can [**Update**] the order, or [**Update and Send Email**] to the 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.



Here you can see all orders in the selected day that you are assigned.

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

Figure 4. Messages List

Orders – change orders and status

The order details screen display the full details of the reservation and the order.

The following picture will show the possibilities of changing the order

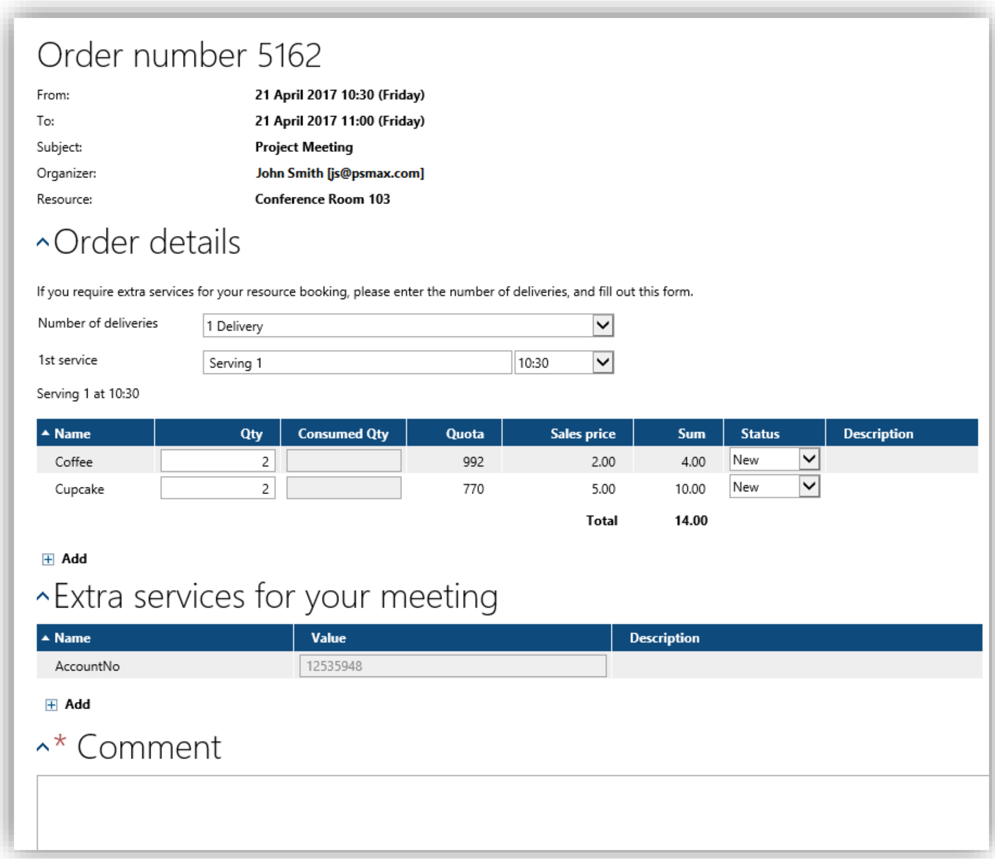
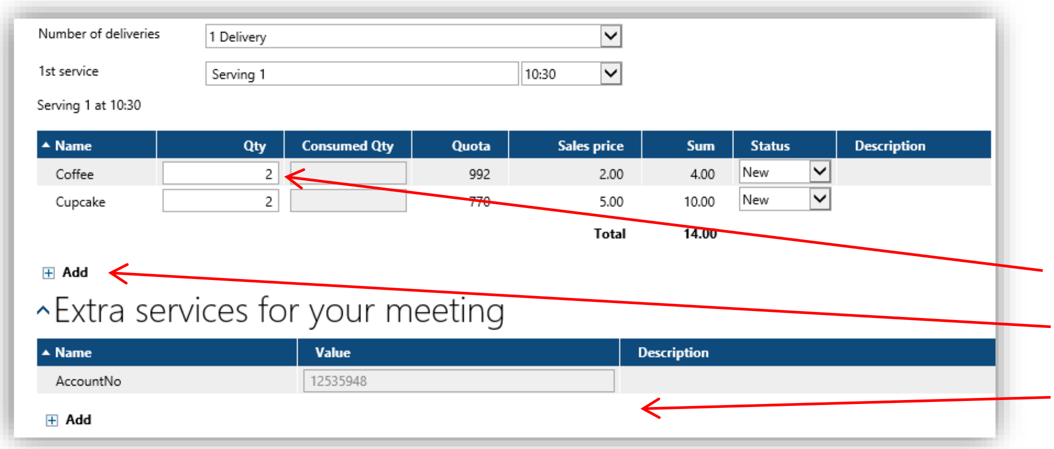


Figure 5. Order Details



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

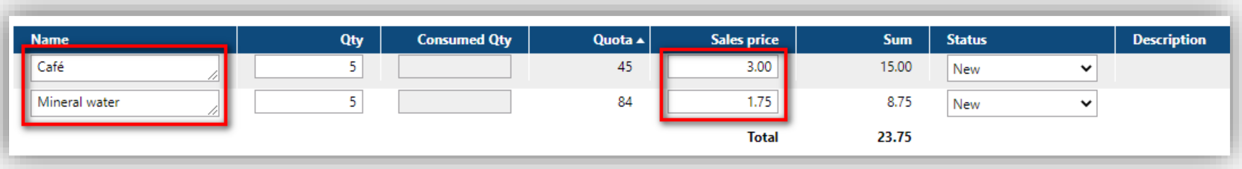
- Item quantity
- Add items
- Change the extra services selected.

Figure 6. Change Order

NOTE:

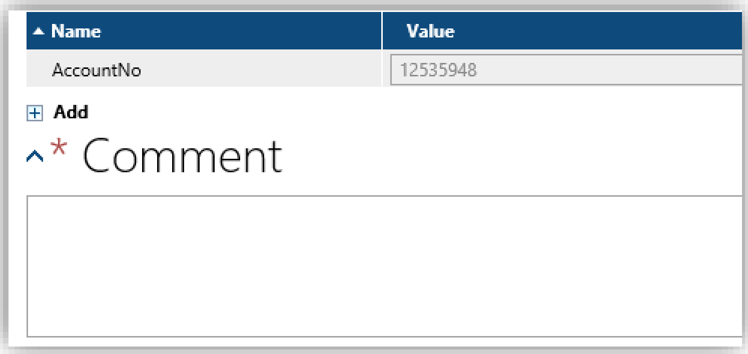
1. You need to add a Comment / message to the Organizer about the changes you make to complete the changes.

2. IF an item is allowed to have flexible pricing and alternative text (refer to ***Administrator Guide***), you will be able to edit its **Sales price** and **Name**, e.g.:



The same can also be done via the order form from the email sent to the service provider.

The following picture and text will show an example:



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.

Figure 7. Order Comment

Catering staff coordination

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

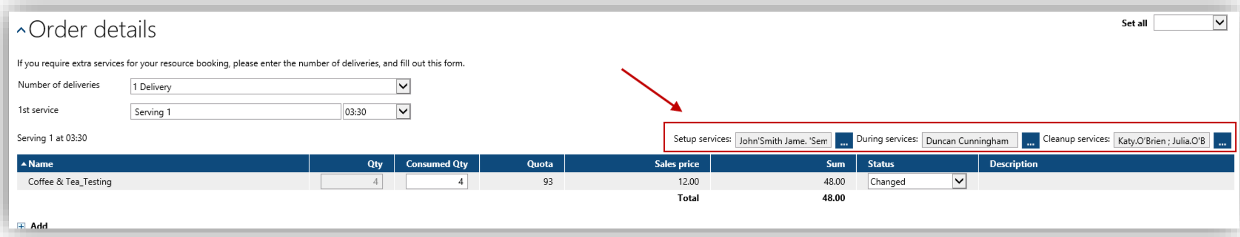


Figure 8. Configure catering staff

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.

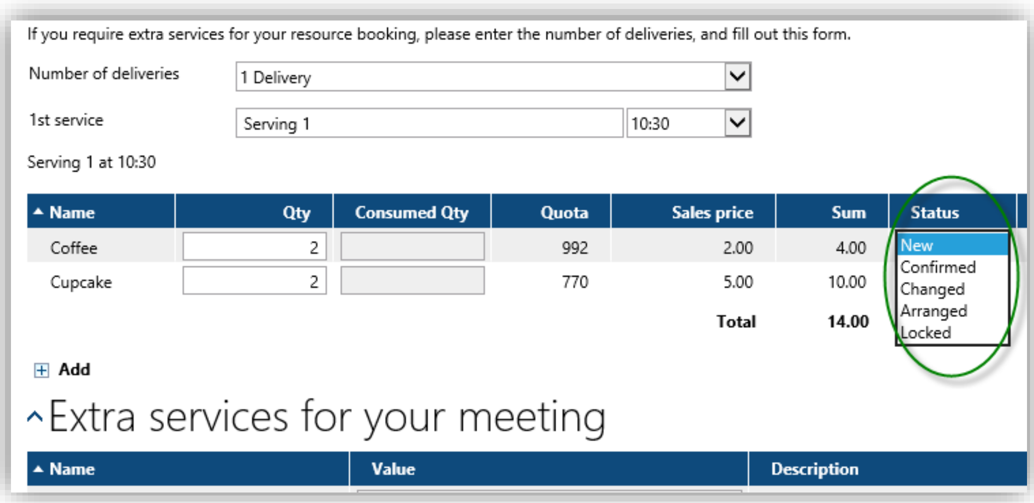
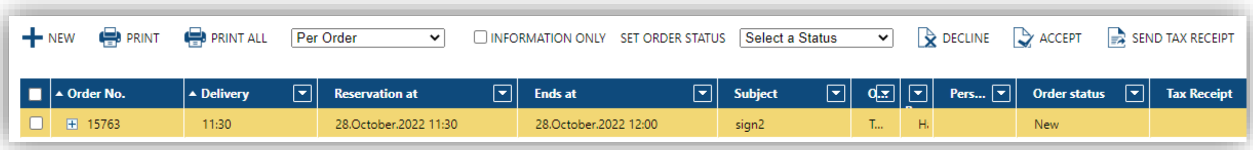


Figure 9. Order Status

In case there are orders that only have items & properties of 'Informative' type, **on RC Admin → Daily Tasks → Orders**, you can check on the **Informative Only** option to mark color to all of those orders. E.g.:



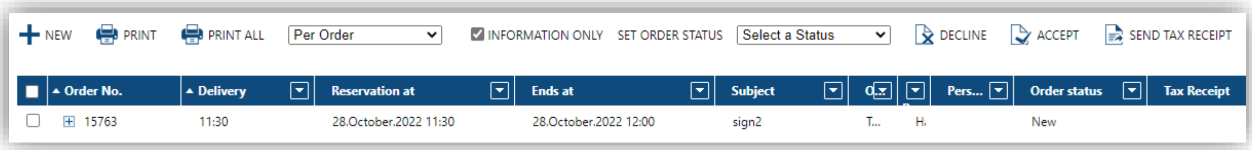
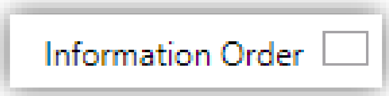


Figure 10. Color mark when Informative Only box is checked.

The color mark is determined by the **Informative Order** color which can be customized in **Designer ➔ Orders**.



'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.

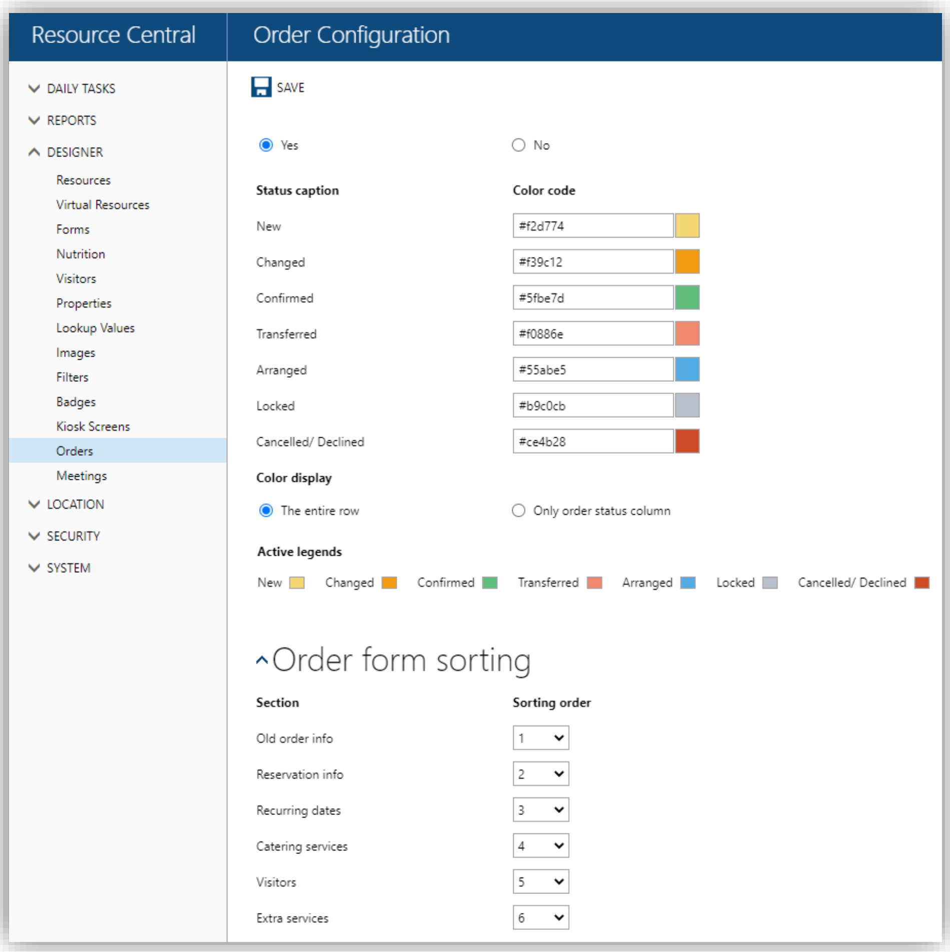


Figure 11. Notification Color configuration

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.

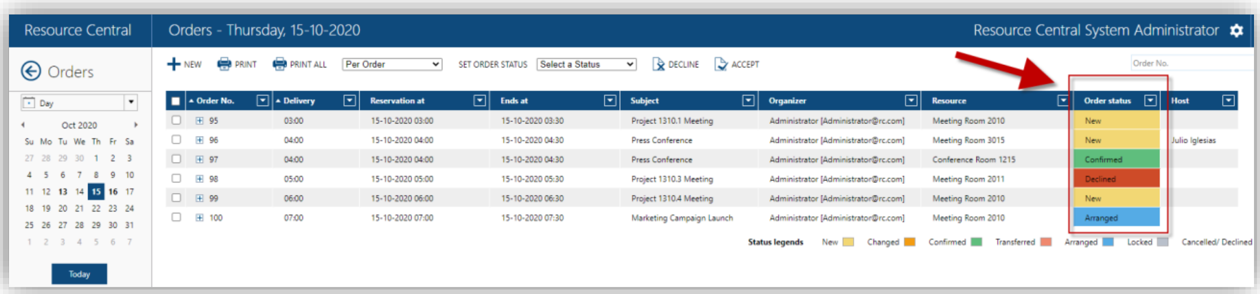
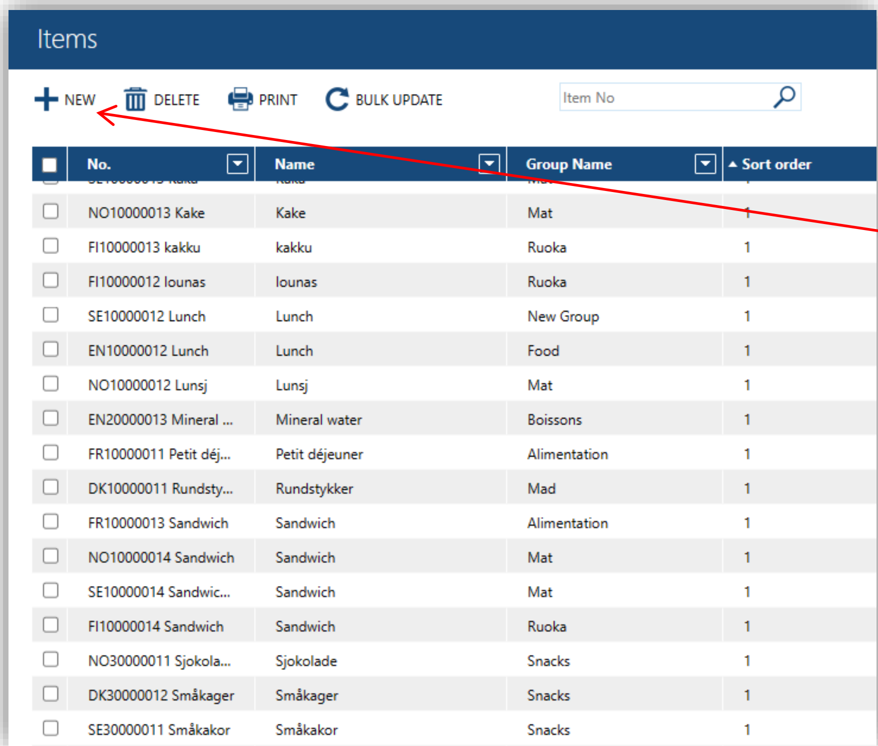


Figure 12. Daily Tasks - Orders

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.



No.	Name	Group Name	Sort order
NO10000013 Kake	Kake	Mat	1
FI10000013 kakku	kakku	Ruoka	1
FI10000012 lounas	lounas	Ruoka	1
SE10000012 Lunch	Lunch	New Group	1
EN10000012 Lunch	Lunch	Food	1
NO10000012 Lunsj	Lunsj	Mat	1
EN20000013 Mineral ...	Mineral water	Boissons	1
FR10000011 Petit déj...	Petit déjeuner	Alimentation	1
DK10000011 Rundsty...	Rundstykker	Mad	1
FR10000013 Sandwich	Sandwich	Alimentation	1
NO10000014 Sandwich	Sandwich	Mat	1
SE10000014 Sandwic...	Sandwich	Mat	1
FI10000014 Sandwich	Sandwich	Ruoka	1
NO30000011 Sjokola...	Sjokolade	Snacks	1
DK30000012 Småkager	Småkager	Snacks	1
SE30000011 Småkakor	Småkakor	Snacks	1

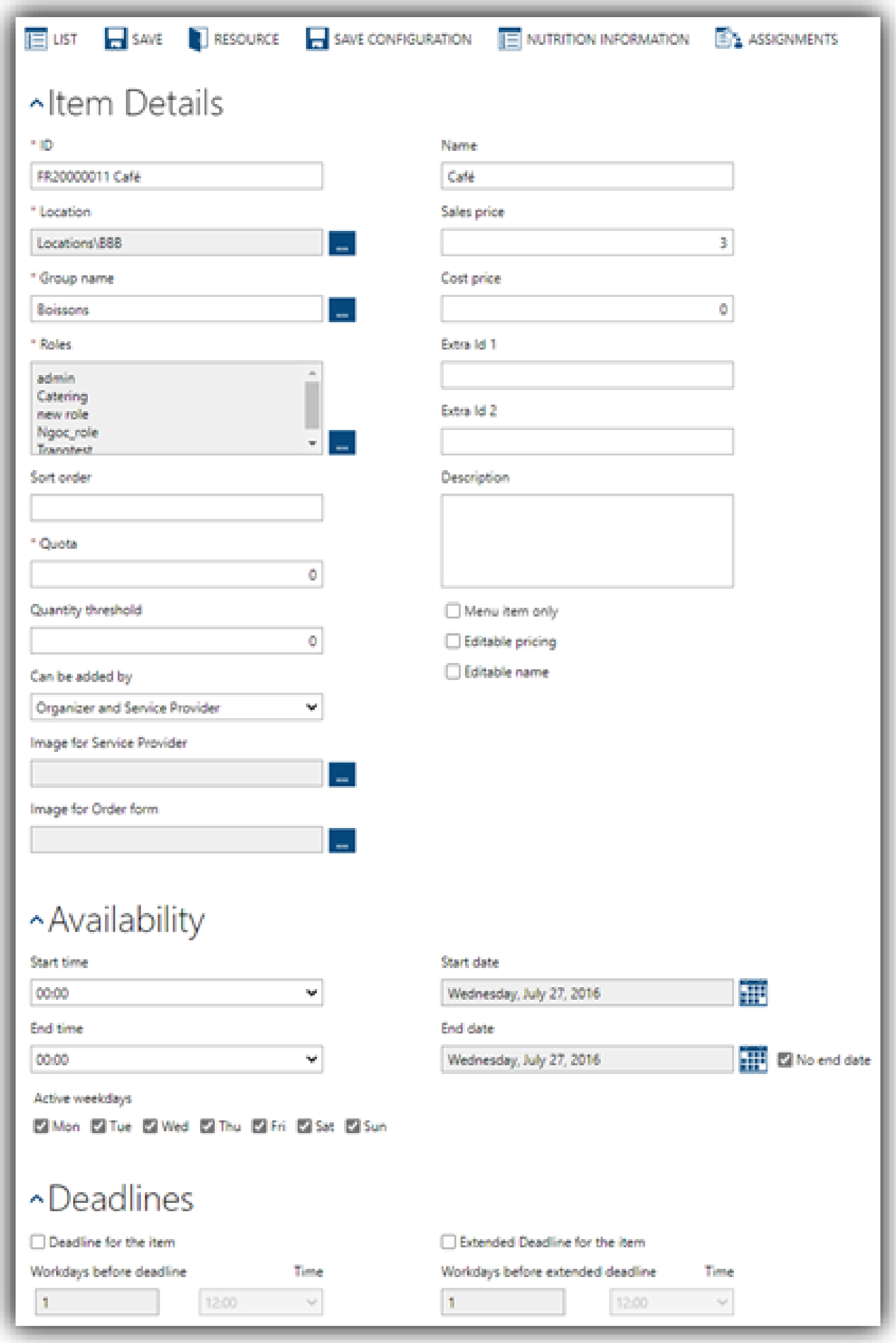
Create new or change an item:

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 13. 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**] on the toolbar when you are done.

Figure 14. Items Details

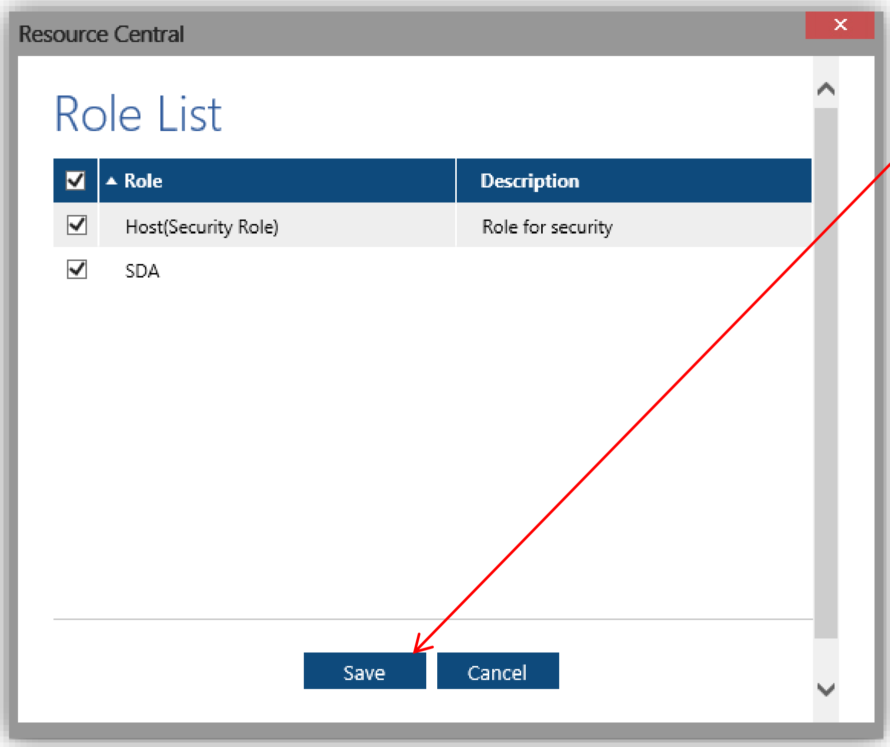
Field	Description
ITEM DETAILS	
ID	A code for identifying the record.
Name	The text presented to the meeting organizer when being asked for this item.
Location	Select the locations of item (mandatory). The location must be defined in '**Locations**' tree under Location node.

Group Name	Group Name can be used for categorizing the items.
Roles	Roles that will be linked to this item.
Sort Order	Sort order can hold any alphanumeric values and are used for sorting items.
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.
Quantity threshold	A threshold when ordering items above a certain quantity. If the item's ordered quantity is equal to or higher than the specified threshold, the order can trigger e.g., a customizable warning to the organizer, have an extended deadline and be marked in The Order Overview. (Refer to ***RC Administrator Guide***)
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
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
Description	A short description.
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.
Editable pricing	It allows that items can be configured to have an editable Sales price. When configured the service provider can manually change the item price via **RC backend ➔ Orders** or **Service Provider's email**. **NOTE**: This option is only available if the value of parameter **Enable.EditableItem** is **'1'**. Refer to ***Parameter Guide*** for more details.
Editable name	It allows that items can be configured to have an editable name. When configured the service provider can manually change the item name via **RC backend ➔ Orders** or **Service Provider's email**. The edited name will only be applied in that order only. **NOTE**: This option is only available if the value of parameter **Enable.EditableItem** is **'1'**. Refer to ***Parameter Guide*** for more details.
AVAILABILITY	
Start date & End date	Time range established to define availability period of the item
Start time & End time	
Active weekdays	
No end date	Check this option to NOT have the end date, meaning the item is always available starting from the start date.
DEADLINES	
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.
Extended Deadline for the item	Enable extended deadline for booking the current item. It can be applied when the item's ordered quantity is above The Quantity Threshold
Workdays before extended deadline & Time	Time range established to define extended deadline to book the item.

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 15. Active Roles for Item

Set role type for item

If a Role is a security role (refer to ***RC 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**.

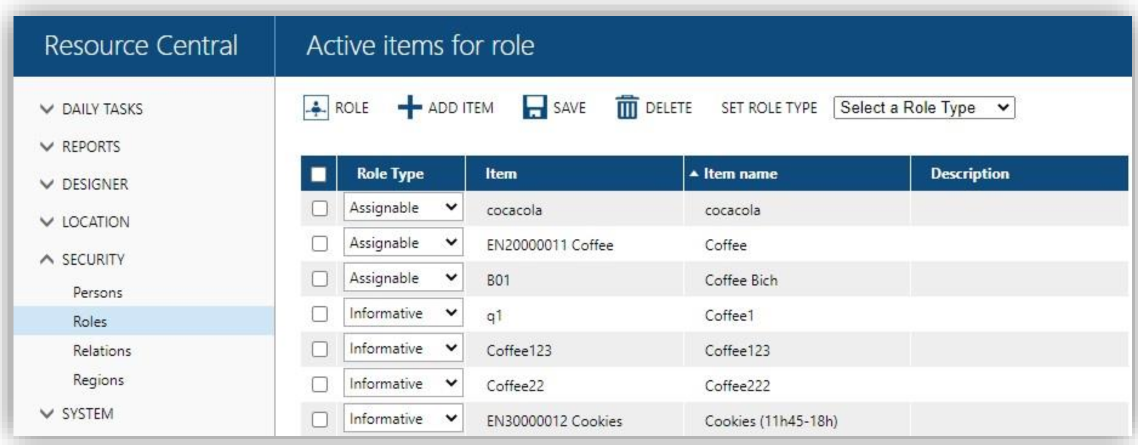


Figure 16. Items assigned to a Role

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:

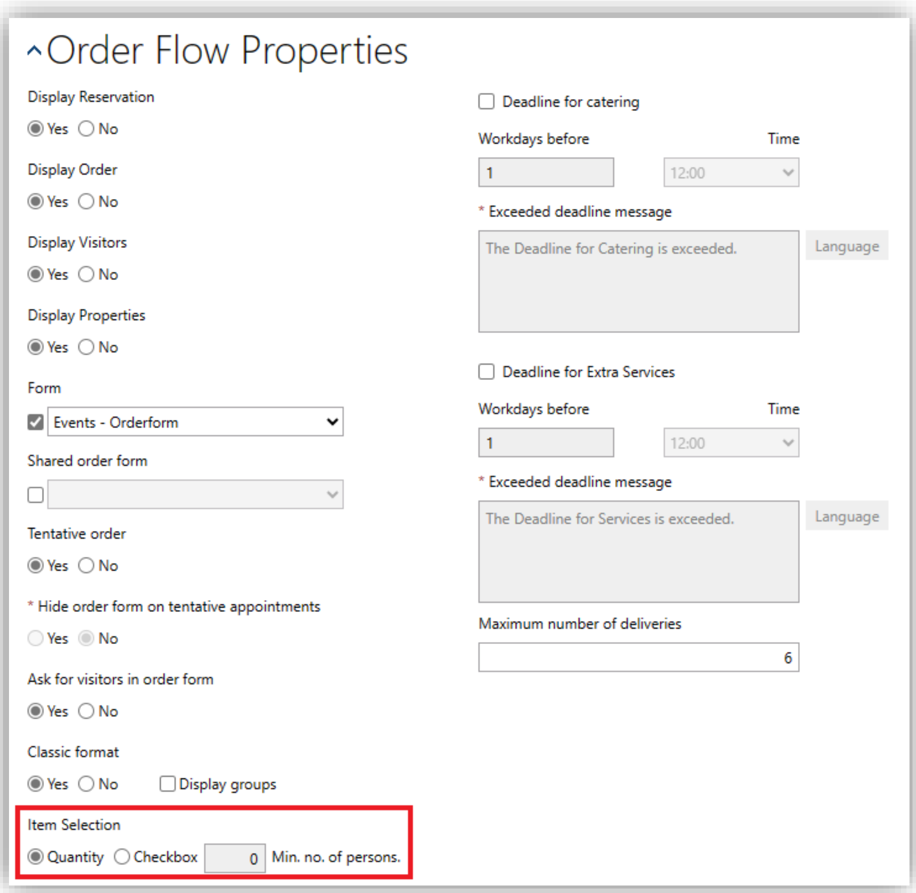


Figure 17. Item Selection in Resource details

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:

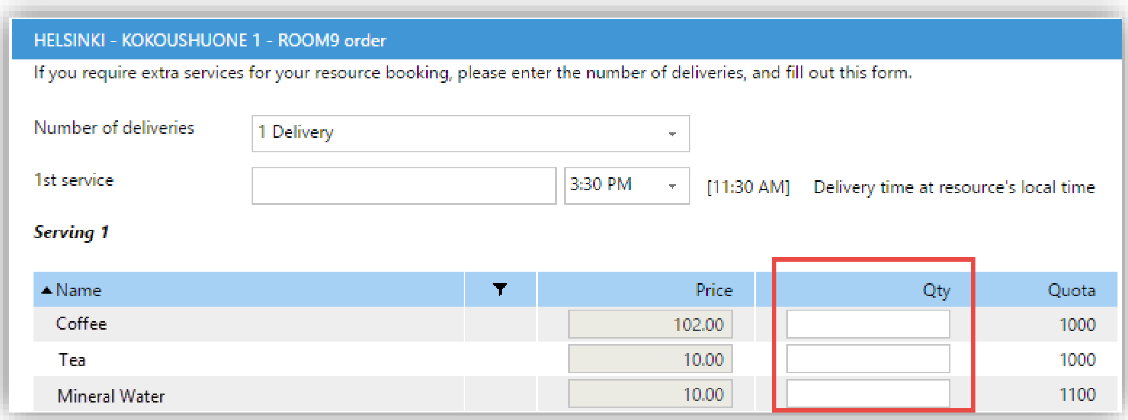


Figure 18. Item Selection – Quantity

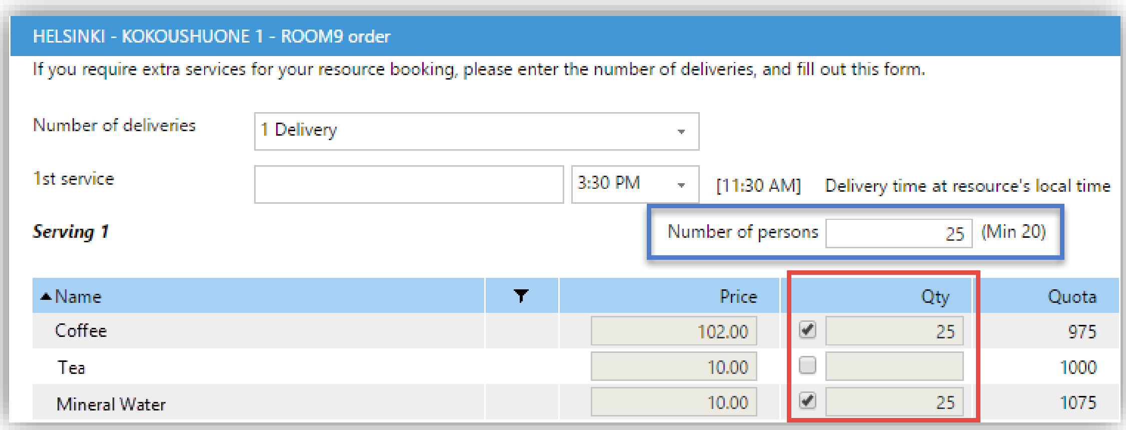


Figure 19. Item Selection – Checkbox

Bulk update

Resource Central allows you to update multiple items at the same time by selecting items you want to update and clicking [**Bulk Update**] button on the toolbar:

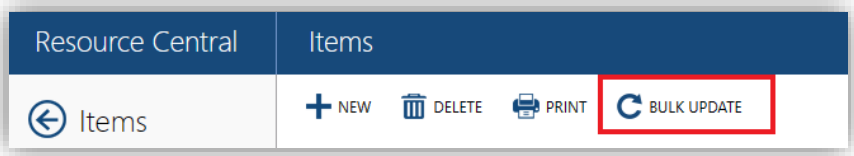


Figure 20. Items mass update button

Item bulk update panel basically consists of 2 columns: **Field** and **Value**.

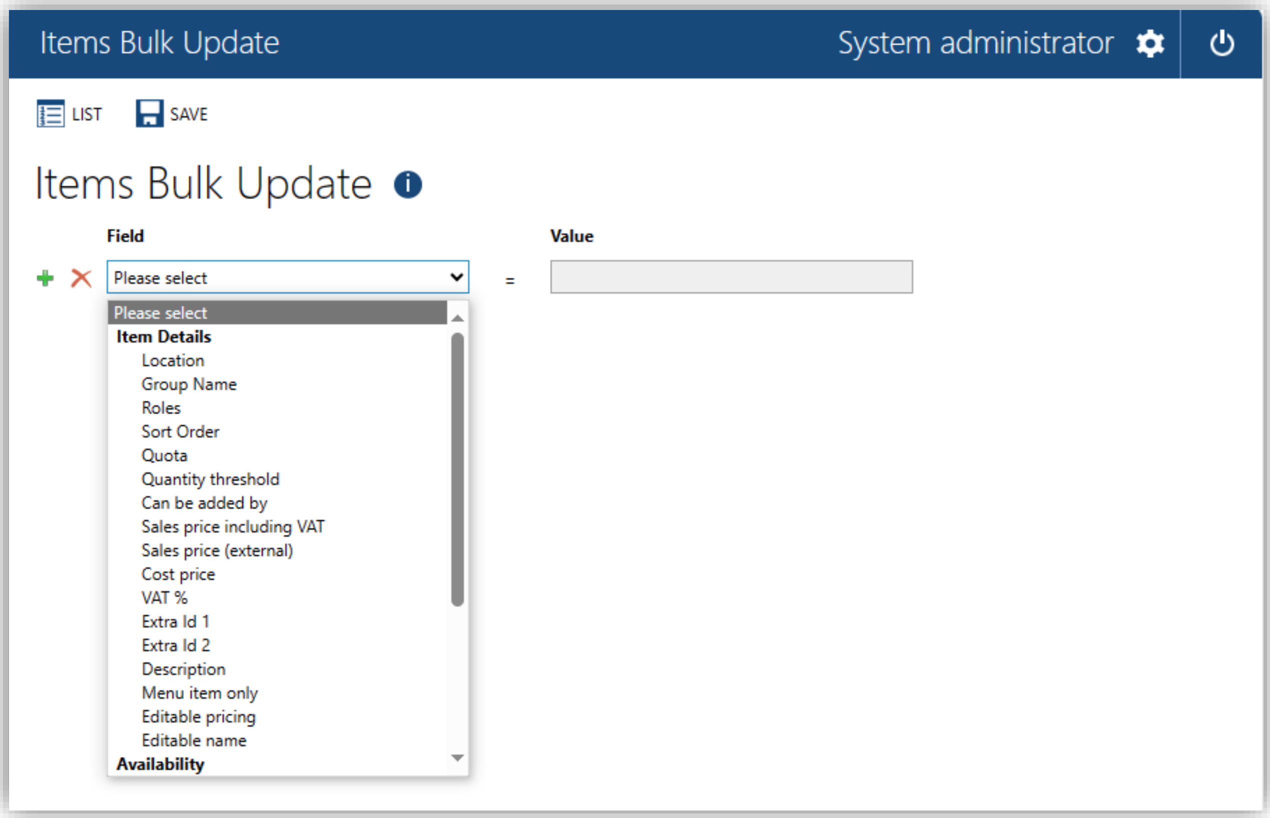


Figure 21. **Items mass update panel**

In the **Field** column, you can add more fields you want to update to the selected items by clicking [+] button and selecting a specific field from the drop-down list. Click on the arrow button to open the drop-down list and all fields in a item's details are displayed for you to select.

After selecting the field, you can fill in **Value** column with the relevant inputs.

IMPORTANT NOTE: Updating existing items will overwrite the already saved information on all the selected, so keep in mind that all needed values need to be reselected when updating multiple items.

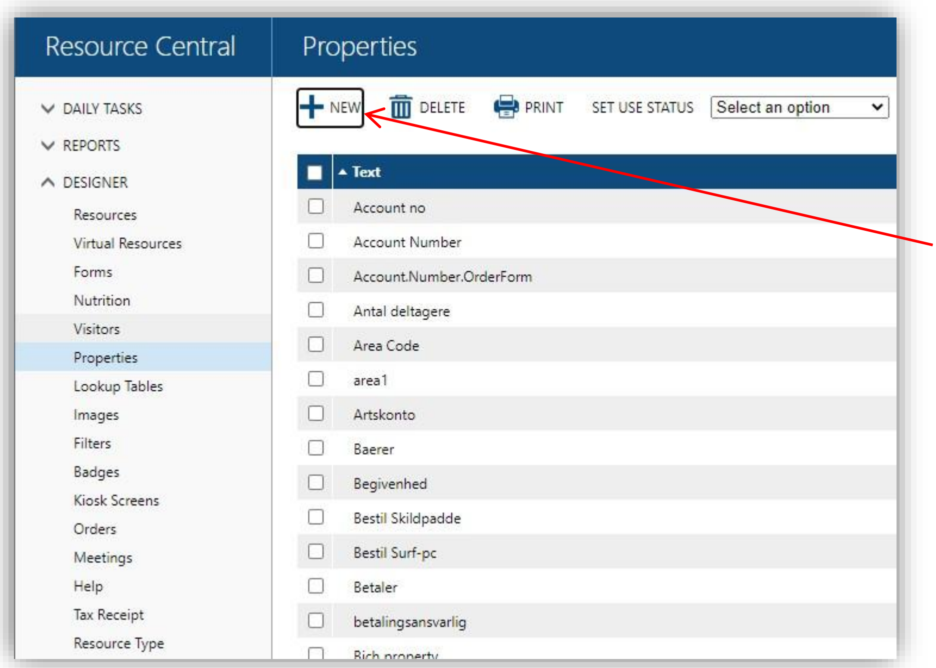
NOTE:
- When the value of **Extended Item Deadline** field is 'Yes', the 'Quantity threshold' value must be greater than 0.
- If the values of **Extended Item Deadline** and **Deadline for the item** are 'Yes', the value of 'Workdays before extended deadline' must be greater than the value of 'Workdays before deadline'.

Click [**Save**] to finish.

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.



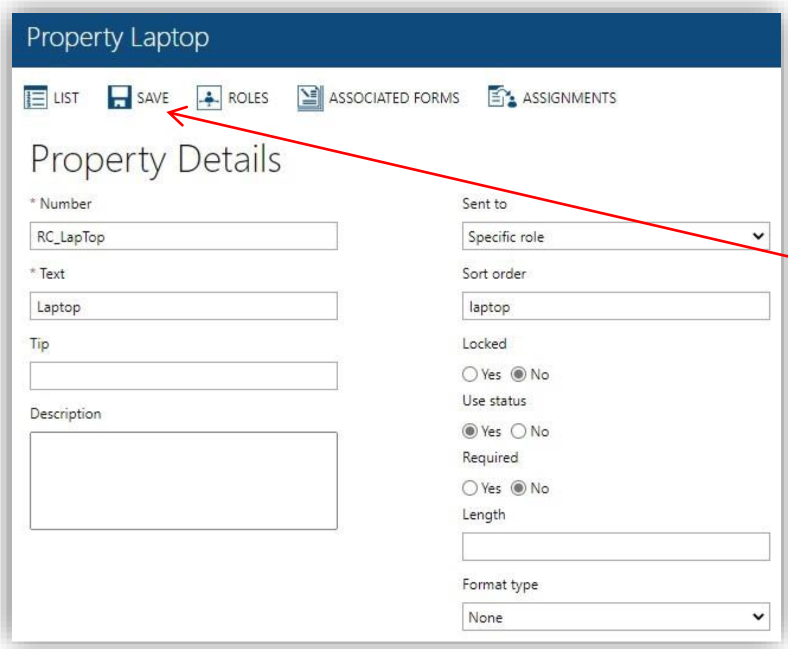
Create new or change a property:

Go to **Designer → Properties**

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

The following window will appear

Figure 22. Properties 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 23. Property Details

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.

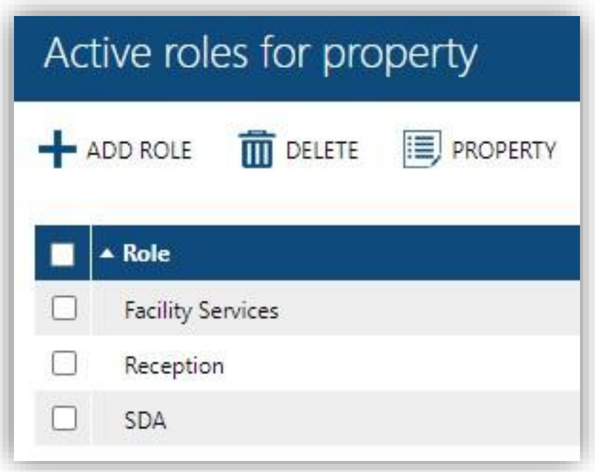


Figure 24. Active Roles for property

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**.

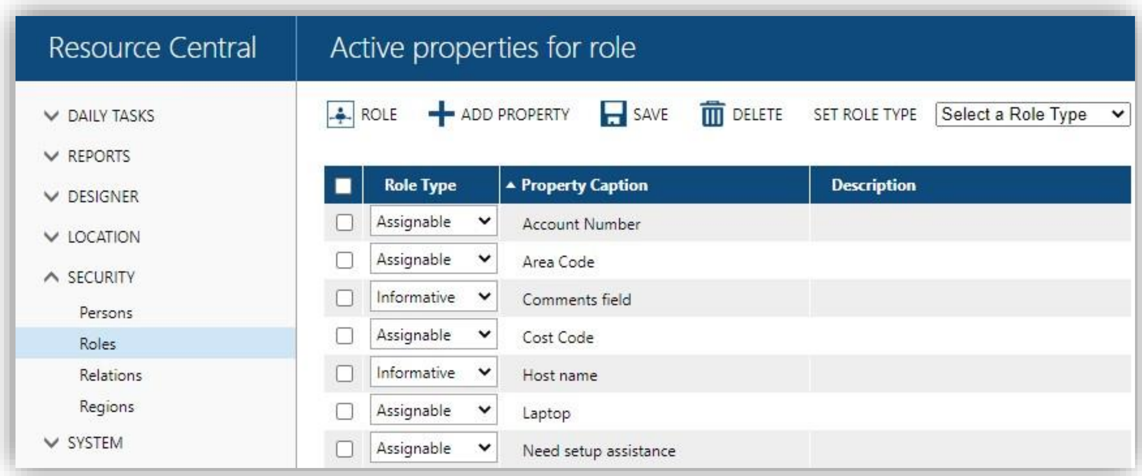


Figure 25. Properties assigned to a Role

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.

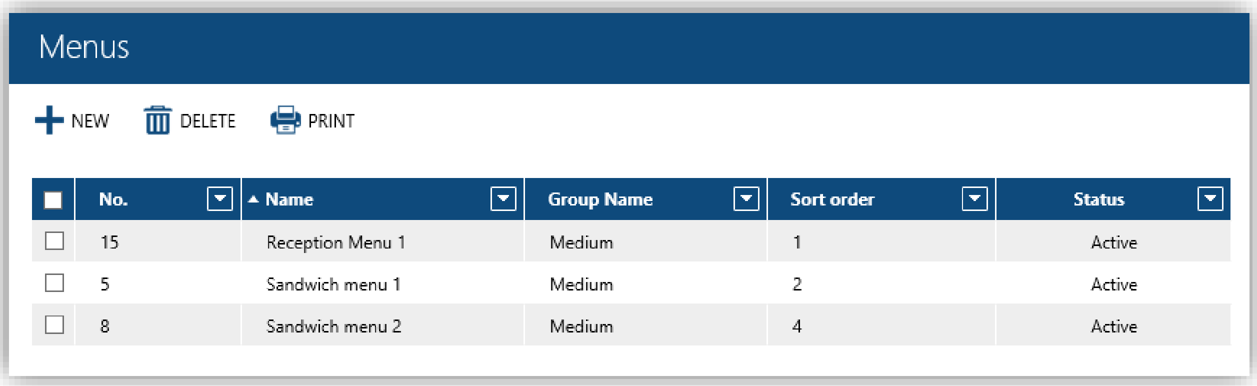


Figure 26. List of menus

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:

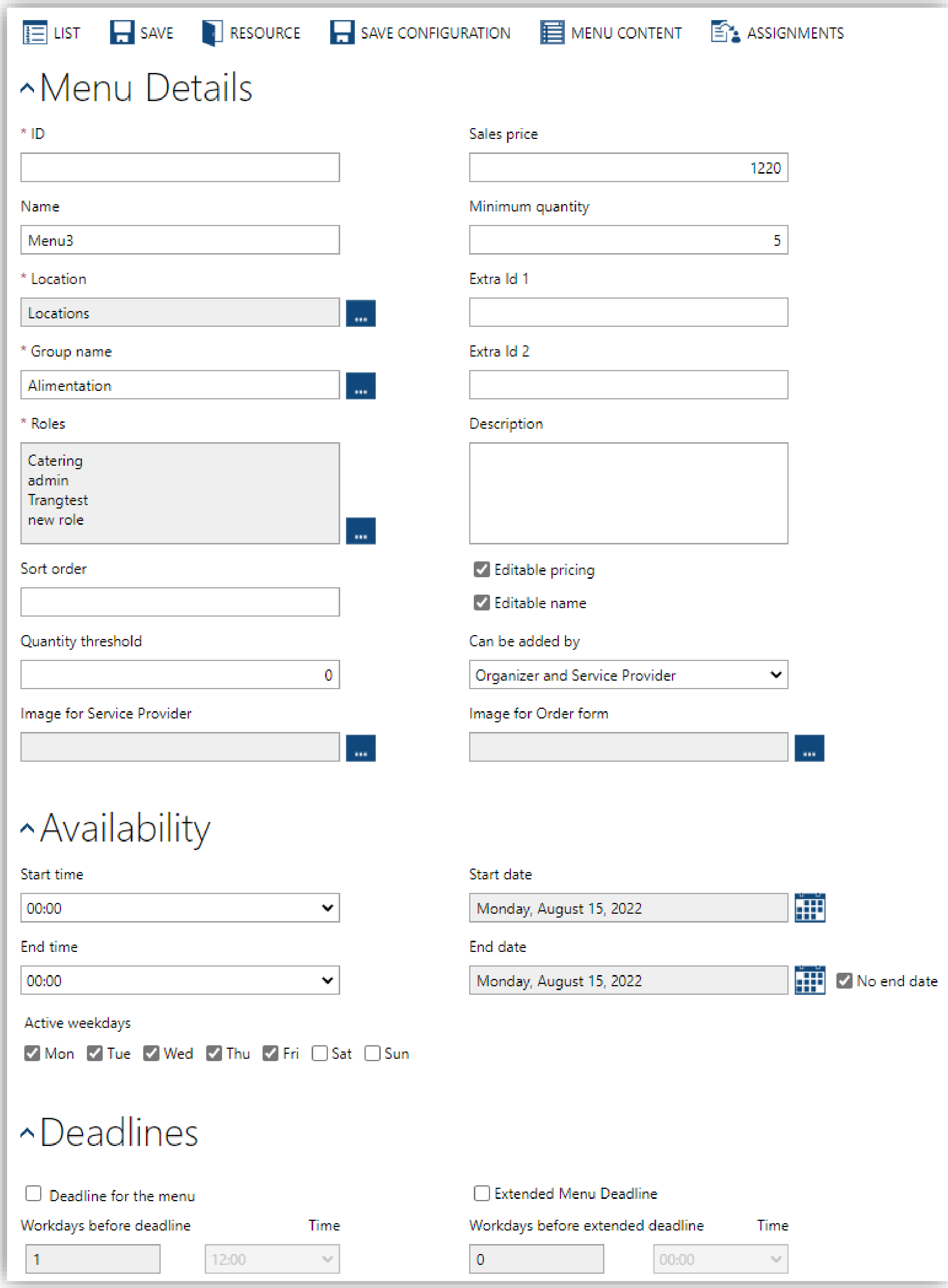


Figure 27. **Details of a menu**

Field	Description
MENU DETAILS	
ID	A code for identifying the record.
Name	The text presented to the meeting organizer when being asked for this item.
Location	Select the locations 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	Roles that are linked to this menu
Sort Order	Sort order can hold any alphanumeric values and are used for sorting menus.
Quantity threshold	A threshold when ordering items above a certain quantity. If the item's ordered quantity is equal to or higher than the specified threshold, the order can trigger e.g., a customizable warning to the organizer, have an extended deadline and be marked in The Order Overview. (Refer to ***RC Administrator Guide***)
Image for Service Provider	Select image to be used in customized reports for Service Provider
Sales Price	Sales price is the price of the menu. 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
Editable pricing	It allows that menu can be configured to have an editable Sales price. When configured the service provider can manually change the menu price via **RC backend ➔ Orders** or **Service Provider's email**. **NOTE**: This option is only available if the value of parameter **Enable.EditableItem** is **'1'**. Refer to ***RC Parameter Guide*** for more details.
Editable name	It allows that menu can be configured to have an editable name. When configured the service provider can manually change the menu name via **RC backend ➔ Orders** or **Service Provider's email**. The edited name will only be applied in that order only. **NOTE**: This option is only available if the value of parameter **Enable.EditableItem** is **'1'**. Refer to ***RC Parameter Guide*** for more details.
Can be added by	Select the person(s) who can add this menu
Image for Order Form	Select image to be used in the order form
AVAILABILITY	
Start date & End date	Time range established to define availability period of the menu
Start time & End time	
Active weekdays	
No end date	Check this option to NOT have the end date, meaning the menu is always available starting from the start date.
DEADLINES	

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.
Extended Menu Deadline	Enable extended deadline for booking the current menu. It can be applied when the menu's ordered quantity is above The Quantity Threshold.
Workdays before extended deadline & Time	Time range established to define extended 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.

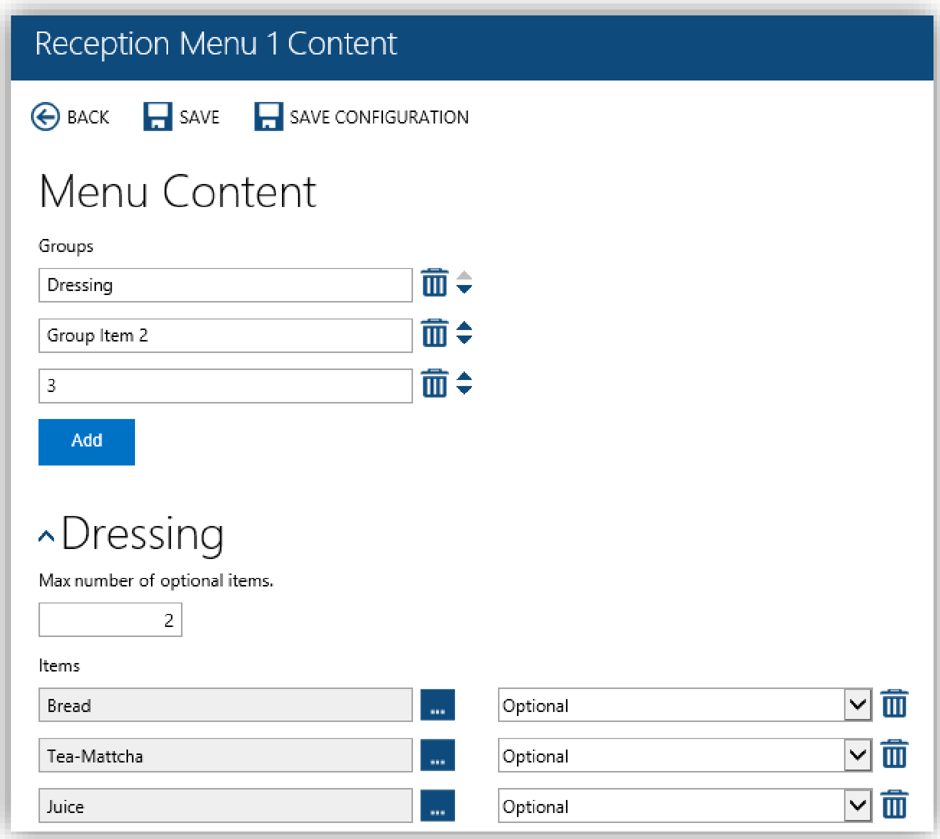


Figure 28. Add items to a menu

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.

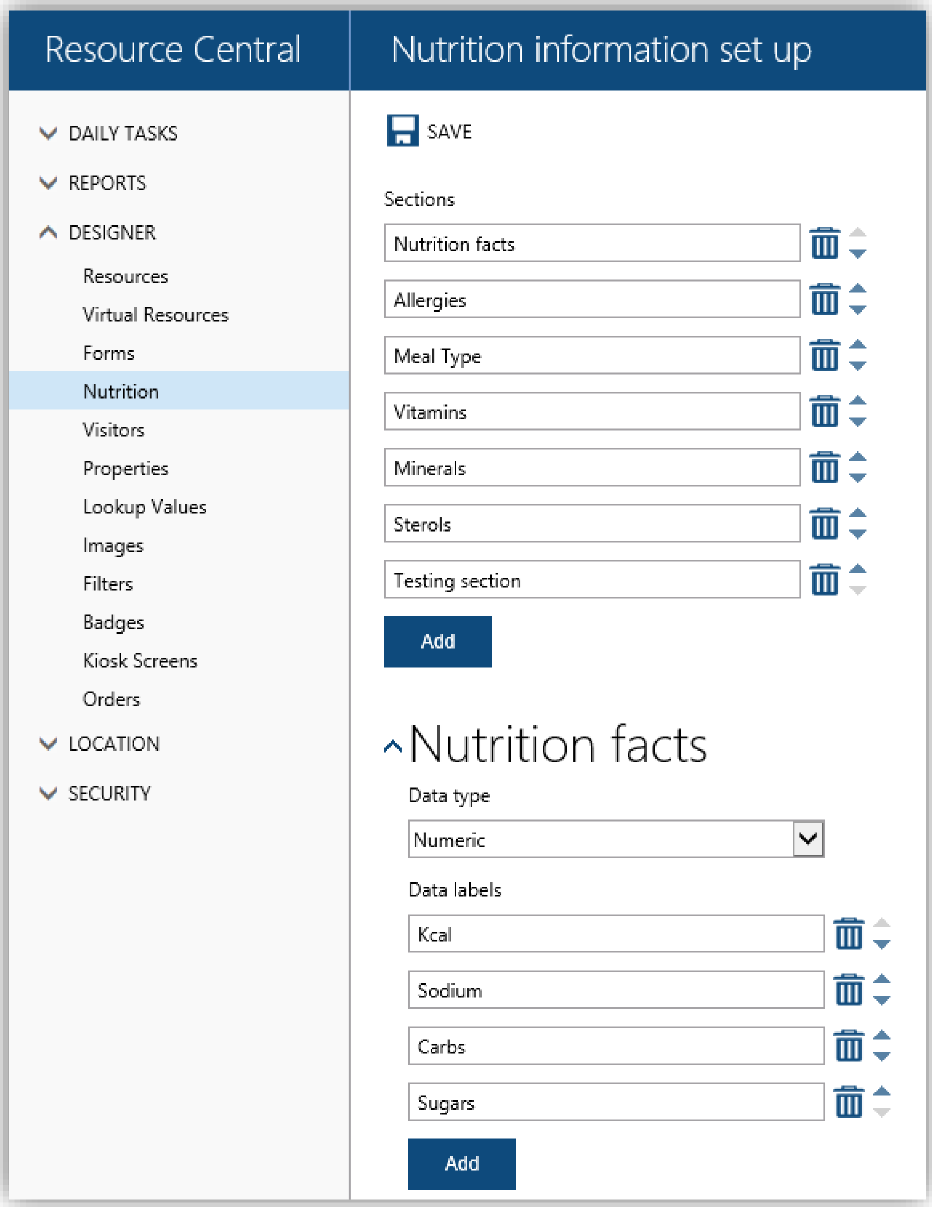


Figure 29. Nutrition configuration

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.

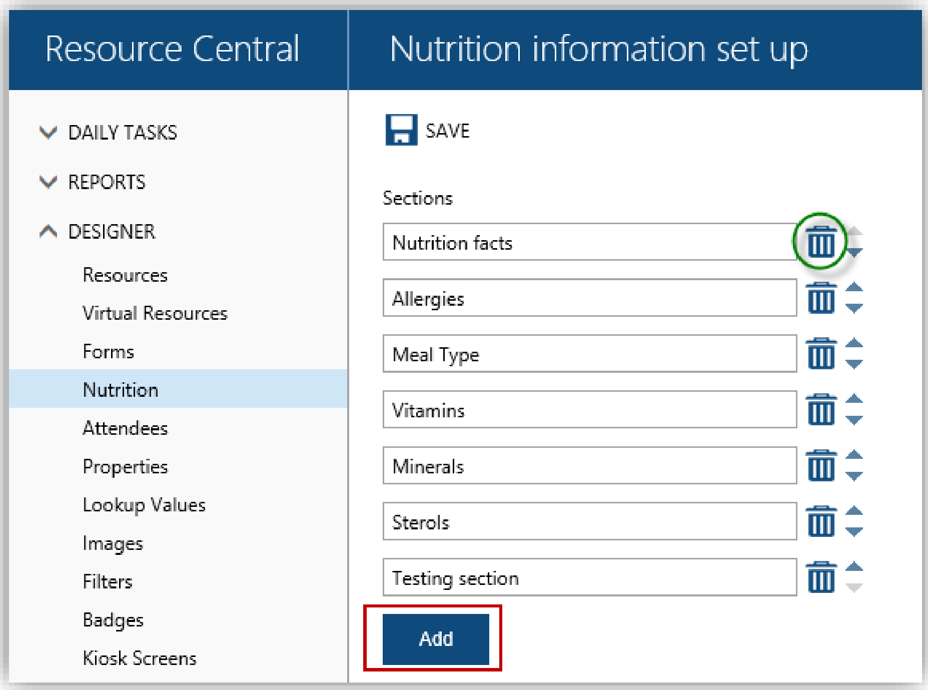


Figure 30. **Configure nutrition information for all items**

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.

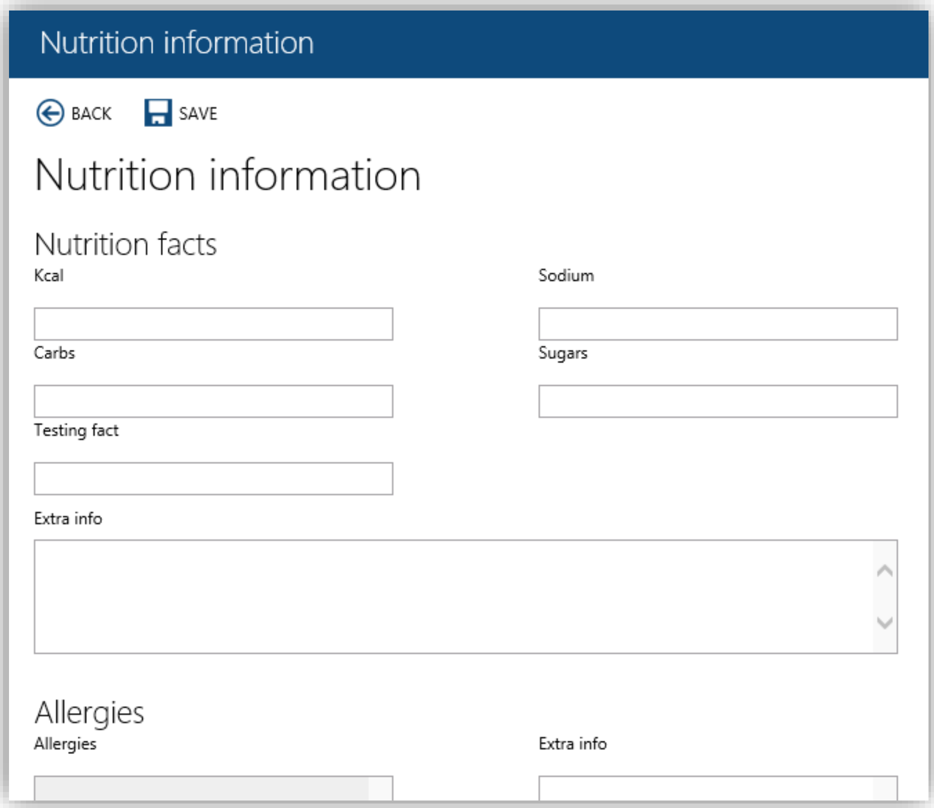
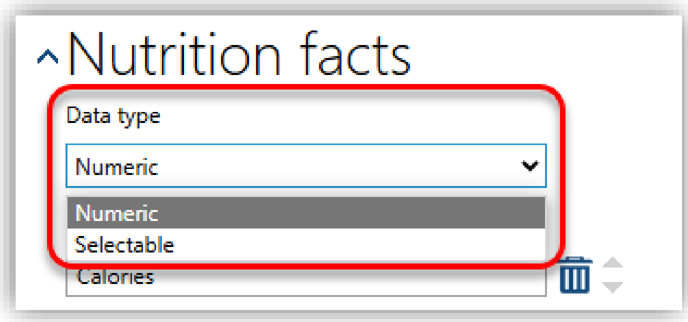


Figure 31. **Nutrition information of an item**

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.

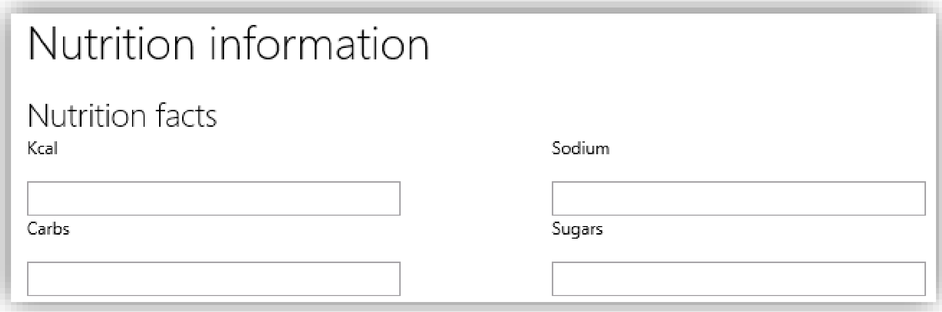


Figure 32. Datatype – Numeric

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

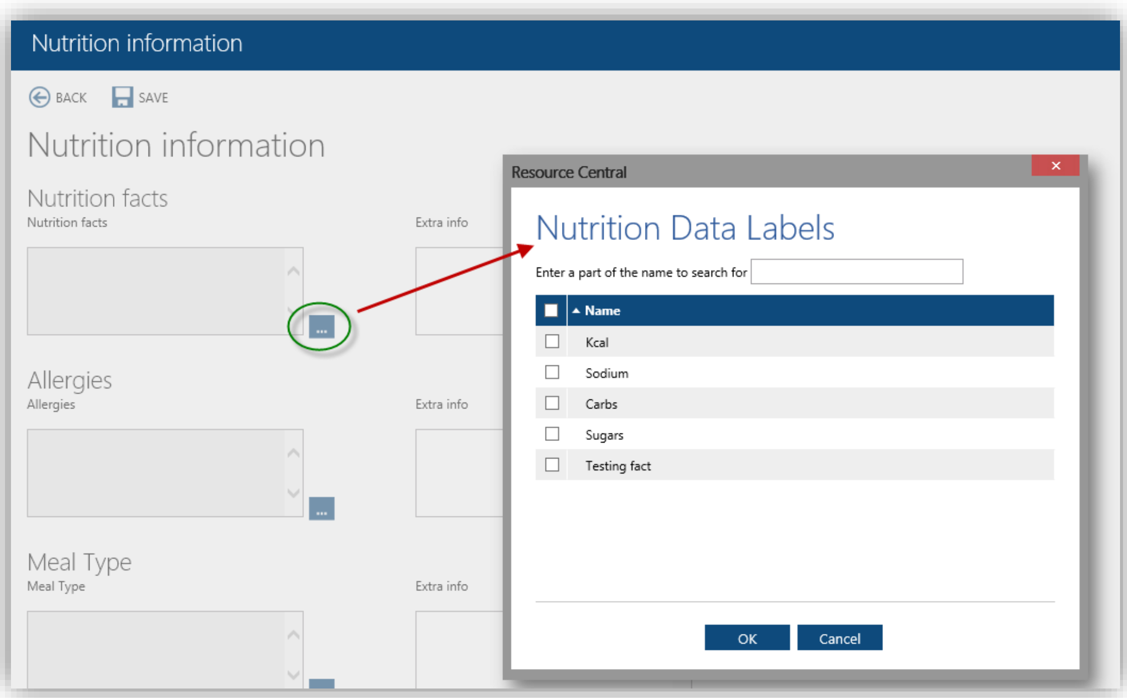


Figure 33. Data type – Selectable

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:

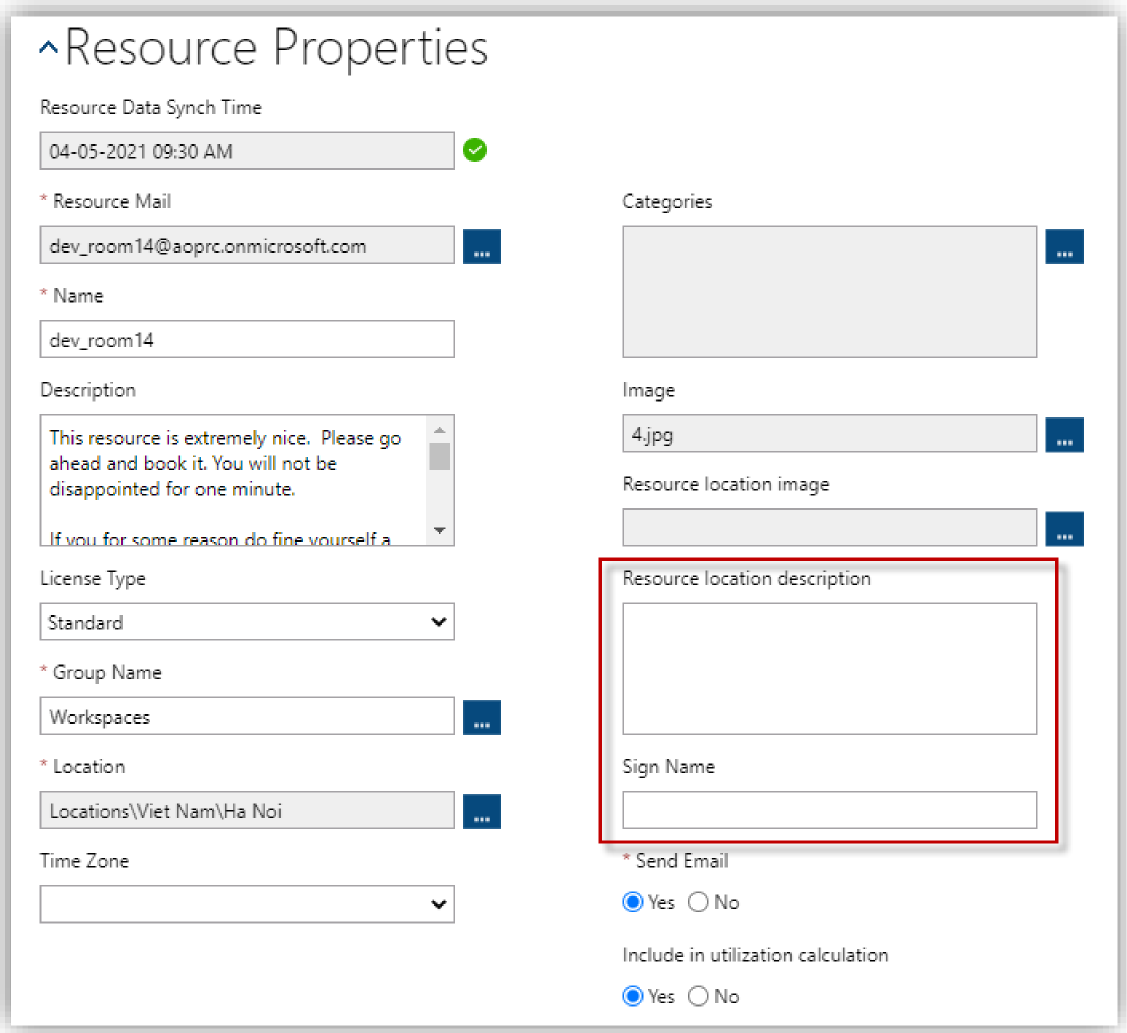


Figure 34. Location image and description

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:

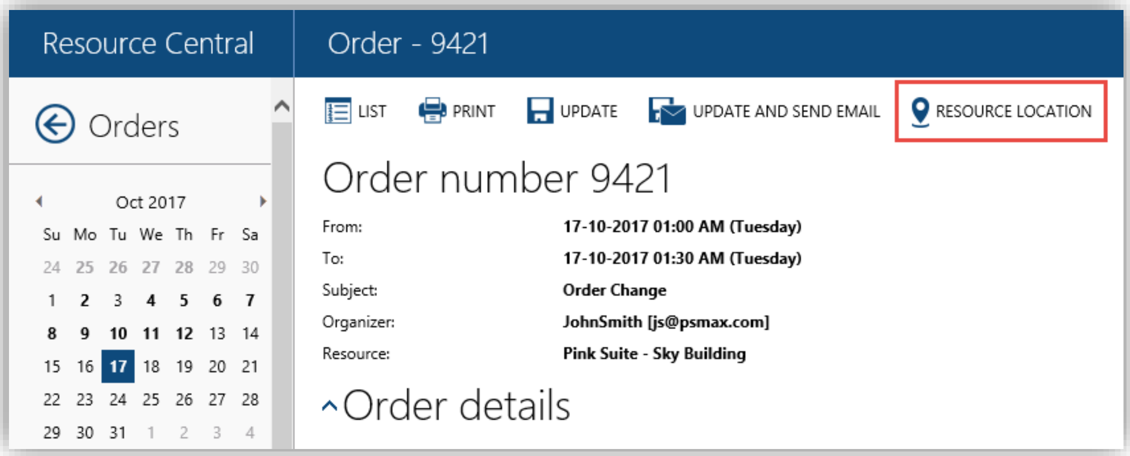


Figure 35. Resource location icon

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

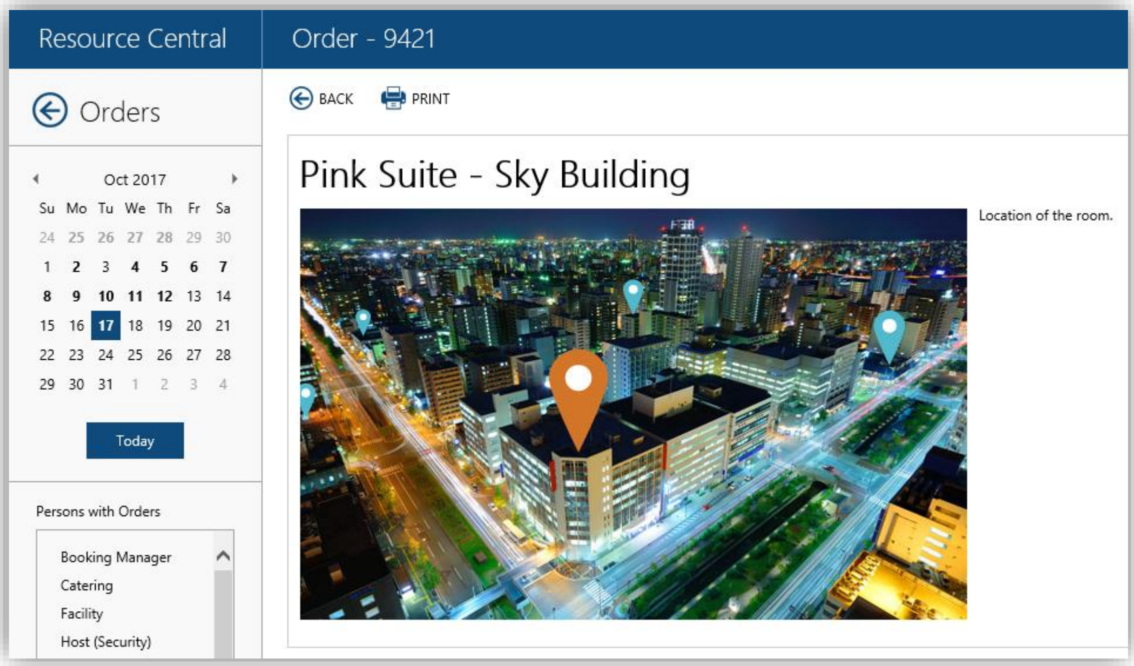


Figure 36. Resource location image and description.

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 relate 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.

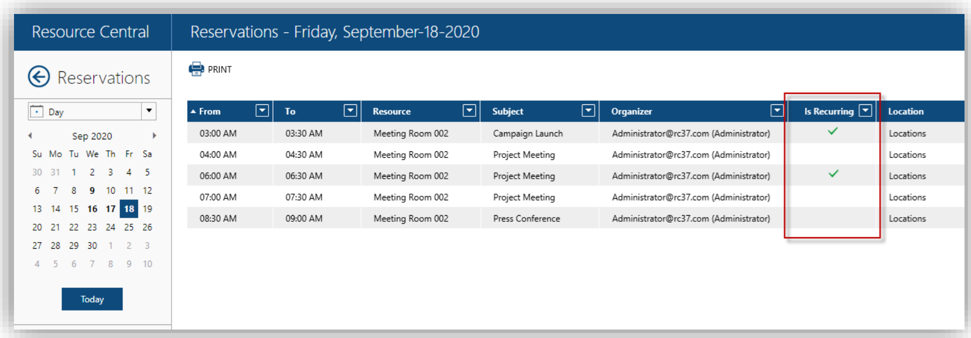


Figure 37. List of Reservations

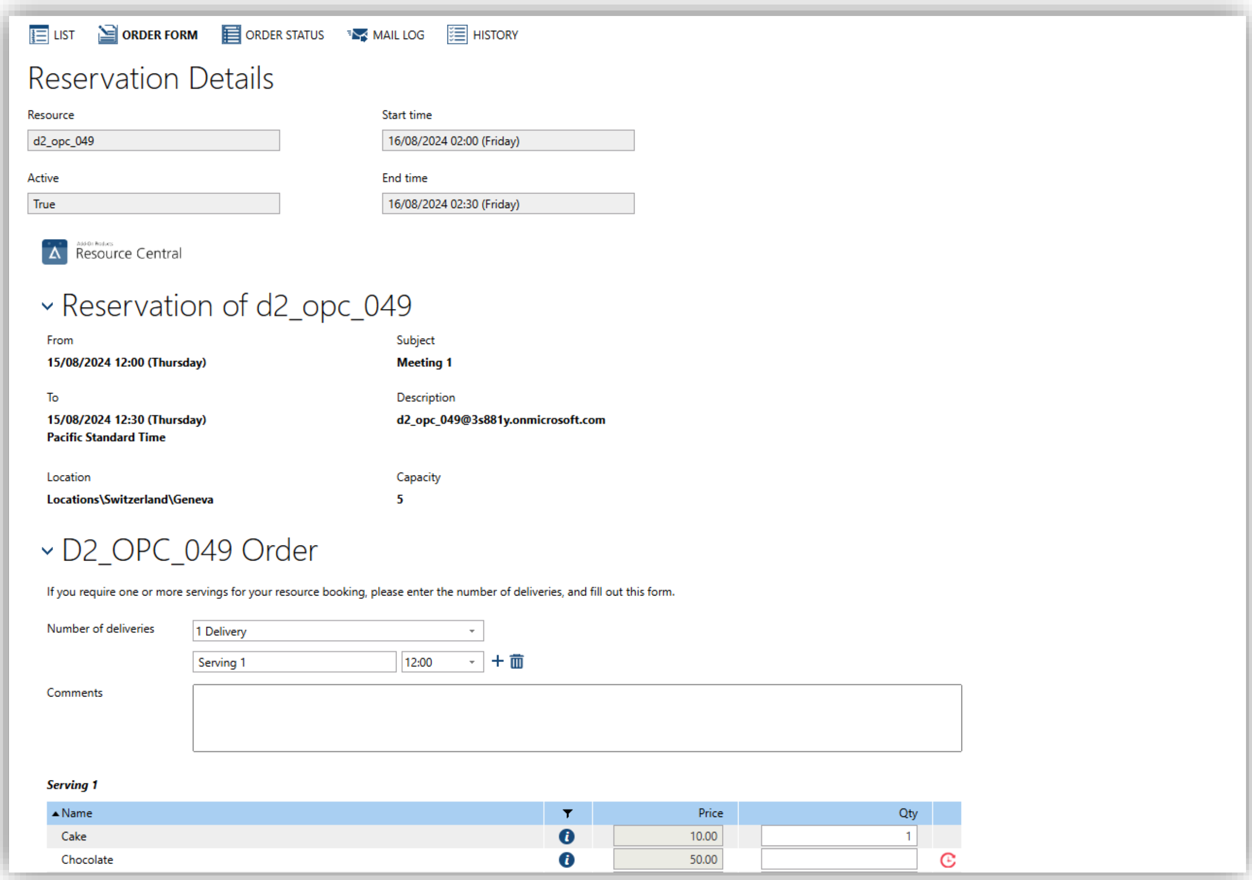
As you can see in the highlighted area in the example, the "**Is Recurring**" caption identifies if the listed reservation is a recurring reservation or not.

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 and add visitors.



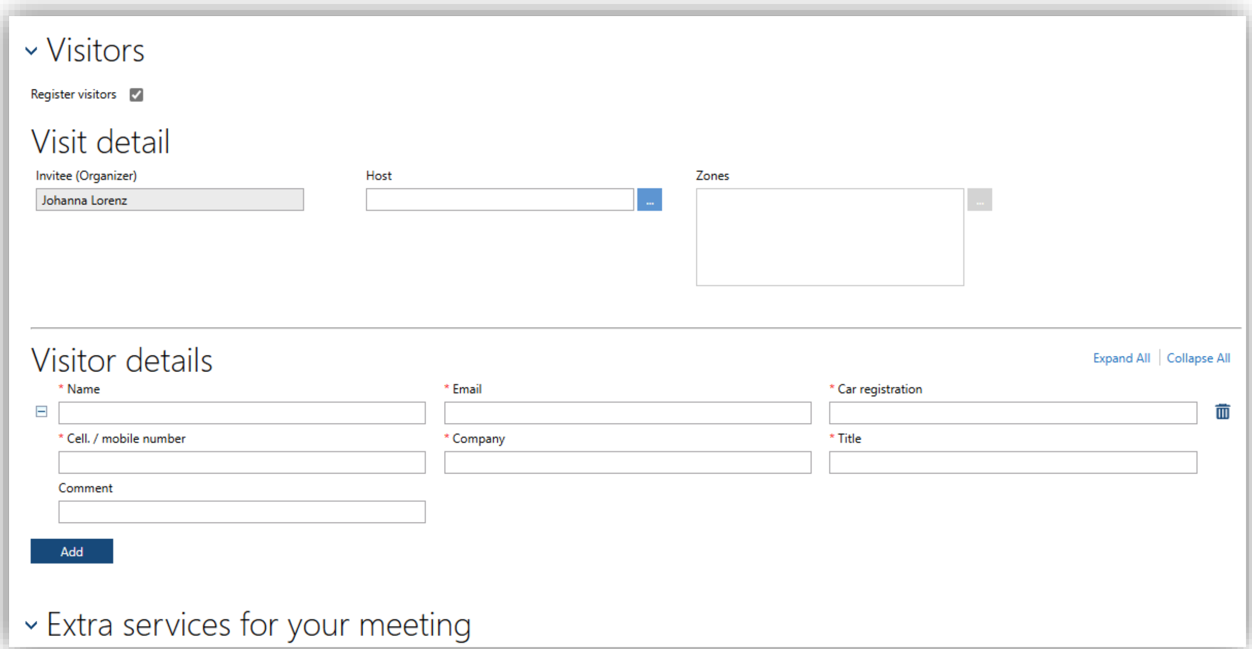


Figure 38. Reservation Details

In **Visitors** section, if the "Register Visitors" checkbox is selected, you can add visitors to the order form by entering visitor details such as name, email, and company directly into the ***Visitor details*** area. These fields can be customized in the **Designer** → **Visitors**, where you can adjust the field names and add or remove fields as needed (refer to ***RC Administrator Guide*** for more information). Click [**Add**] to add more visitors.

To finalize all changes to the order, press the **[Send order]** button at the bottom of the order form.

Overview

The overview screen shows you the booking status of the available resources at the currently selected date. When opening the screen, the current system date will be selected by default.

You can **filter** the reservation view by resource group which are listed under **'Group'** section. The highlighted dates within the selected month of the calendar are those that have reservations. The time interval shown in this screen can be configured through **Basic System Parameters** at Resource Central manager site.

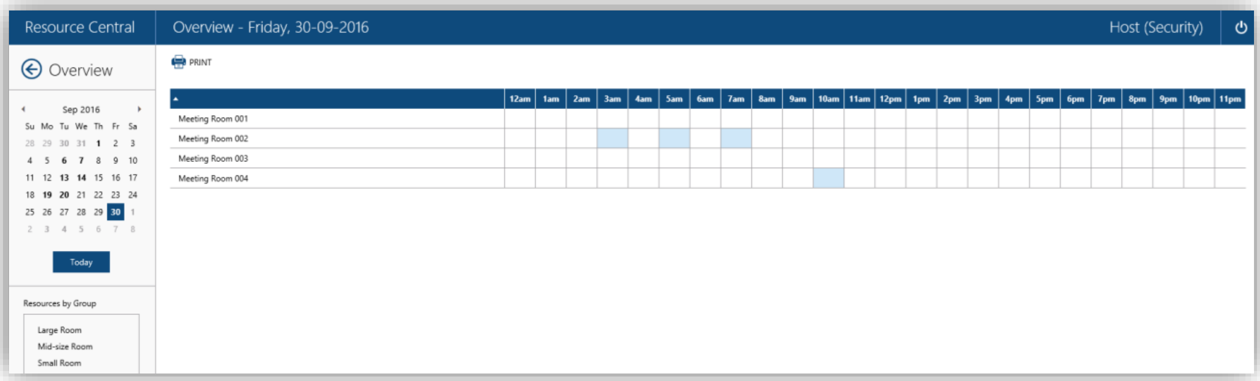


Figure 39. Overview of the Reservations

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. When a visitor is registered, he/she will need authorization before his/her Arrival status can be changed. This can also be done on this Visitors list (aside from the authorization email sent to authorizers).

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.

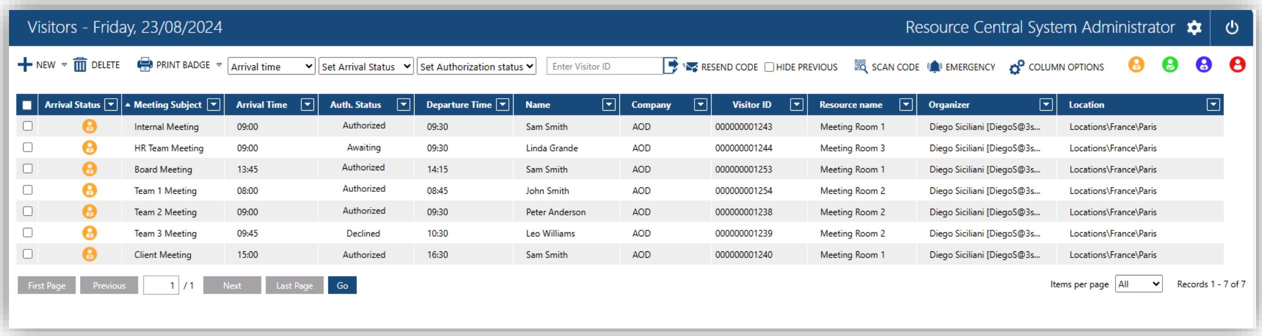
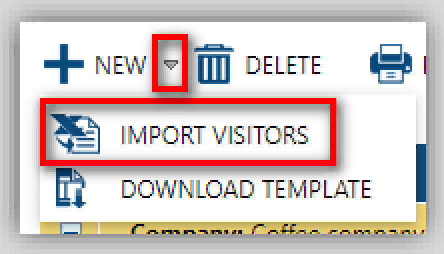
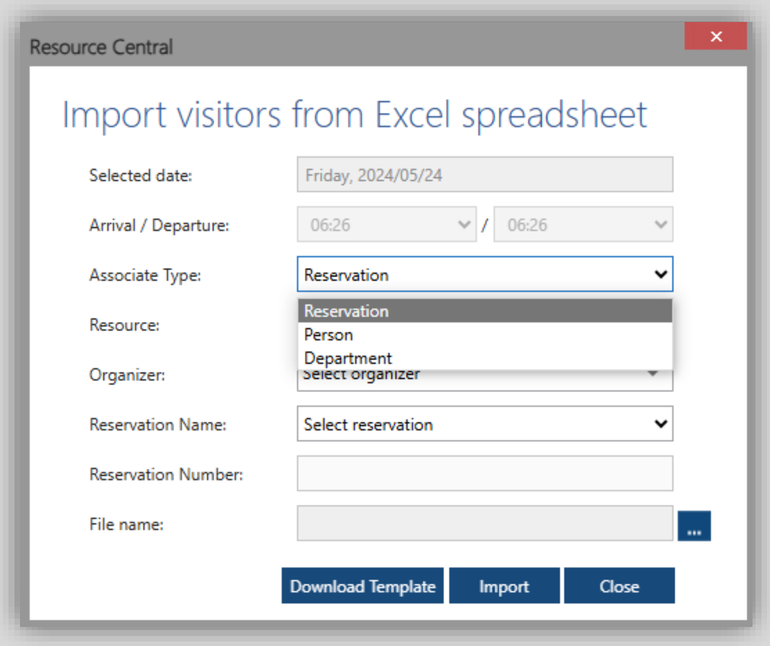


Figure 40. List of Visitors

<table>
<tr><th>Toolbar Buttons</th><th>Description</th></tr>
<tr><td>New</td><td>You can create a new visitor</td></tr>
<tr><td>Import Visitors</td><td>Import visitors from an Excel file.


Clicking the button will opens a new window for you to select Excel file to import:

</td></tr>
</table>

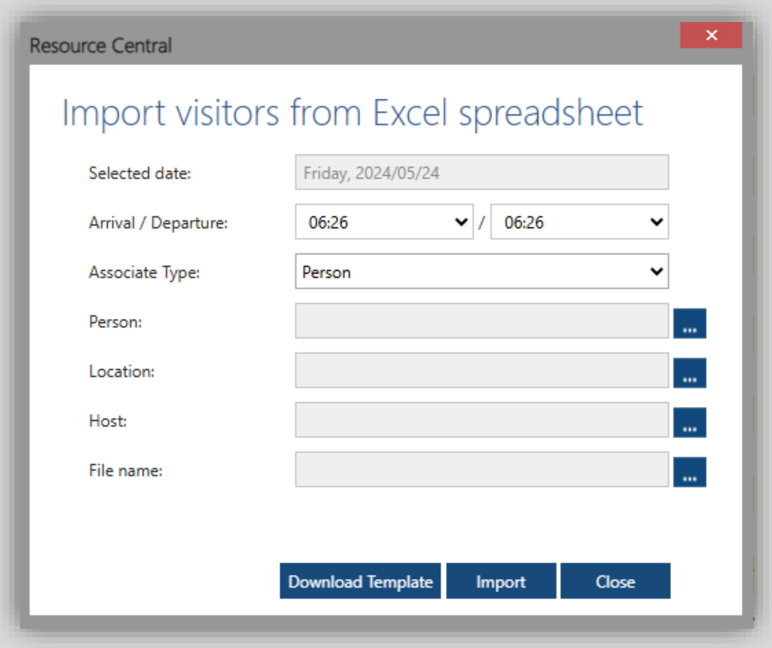
On this window, you can select an Associate Type among 3 options: **Reservation**, **Person**, and **Department**. Select/import the filters, then upload an Excel file from your machine to import visitor details via 'File name' field.

The figure above demonstrates the case you select **Reservation** as Associate Type. After selecting a Reservation Name, its ID will be automatically filled in the 'Reservation Number' field. Once you are done, click [**Import**] to import visitors from the Excel file for the selected reservation.

NOTE:

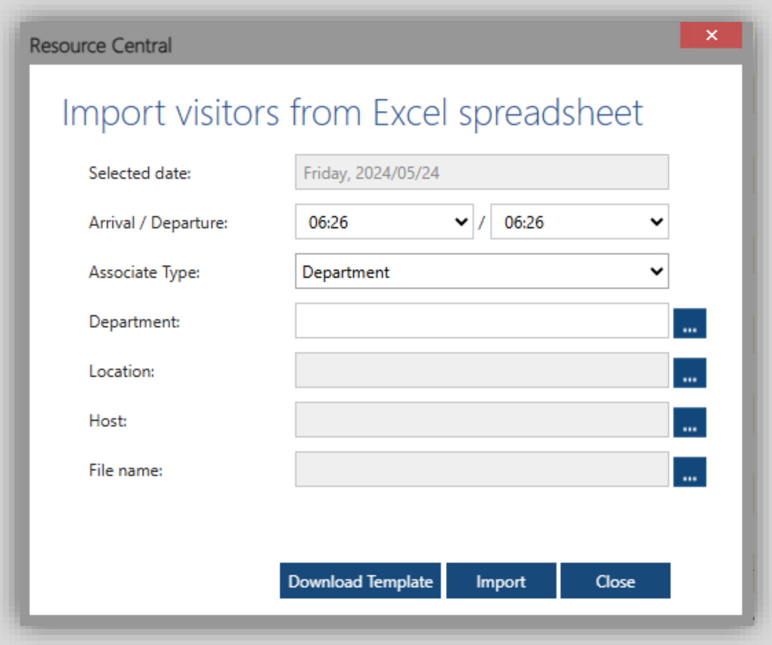
- The Arrival / Departure field cannot be edited as it depends on the chosen reservation.
- All dropdown lists mentioned above only include standard resources, specifically: Resources that are standard type, Organizers who booked standard resource, and Reservations in standard resource.
- The Light resource and Pooled resources (which are not available for Ordering) will NOT be included.

If you select **Person** as Associate Type, it should assemble the following figure:

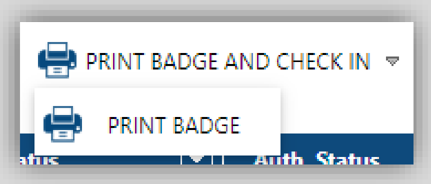


Once you are done, click [**Import**] to import visitors from the Excel file.

If you select **Department** as Associate Type, it should assemble the following figure:

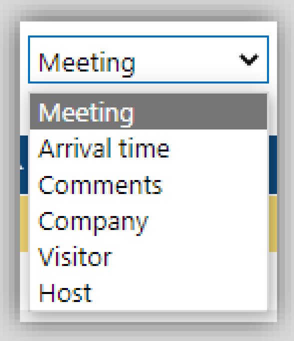
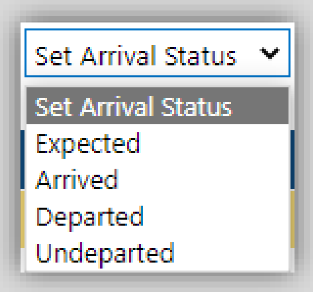
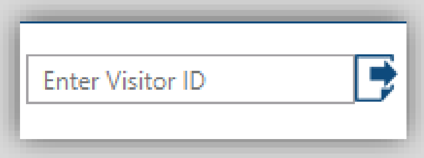
<table>
<tr>
<td></td>
<td>


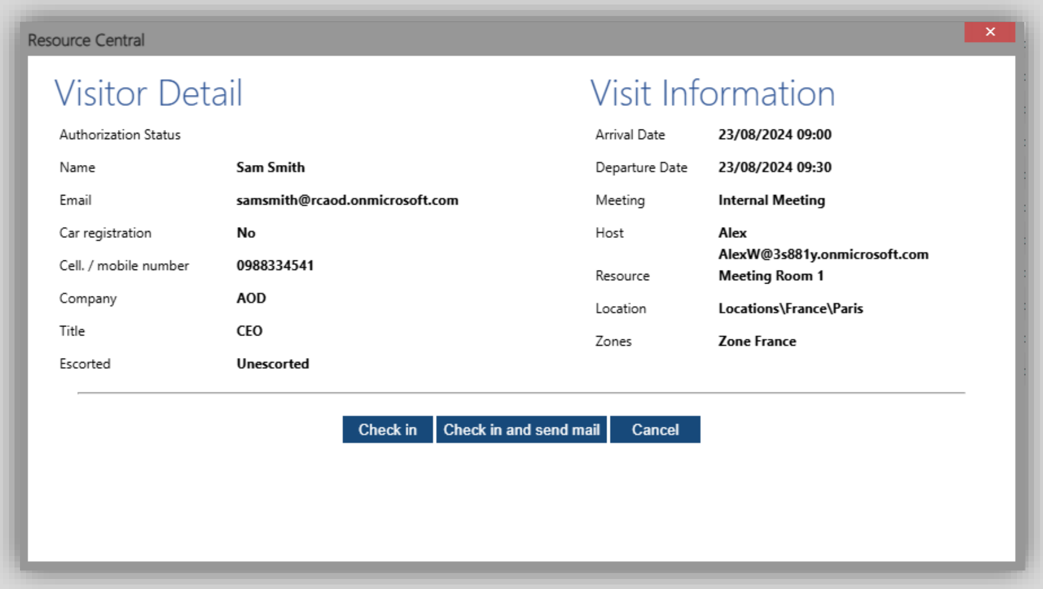
Once you are done, click [Import].

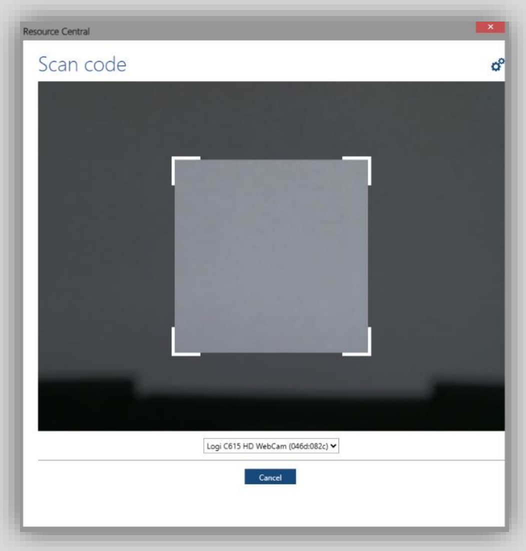
NOTE: The field of Arrival / Departure is editable for Person and Department associate types only.
</td>
</tr>
<tr>
<td>Download Template</td>
<td>Download the Visitor Excel template file in which visitor details can be filled in to be used for bulk update of visitors as described above under “Import Visitors”.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the selected visitors</td>
</tr>
<tr>
<td>Print Badge</td>
<td>


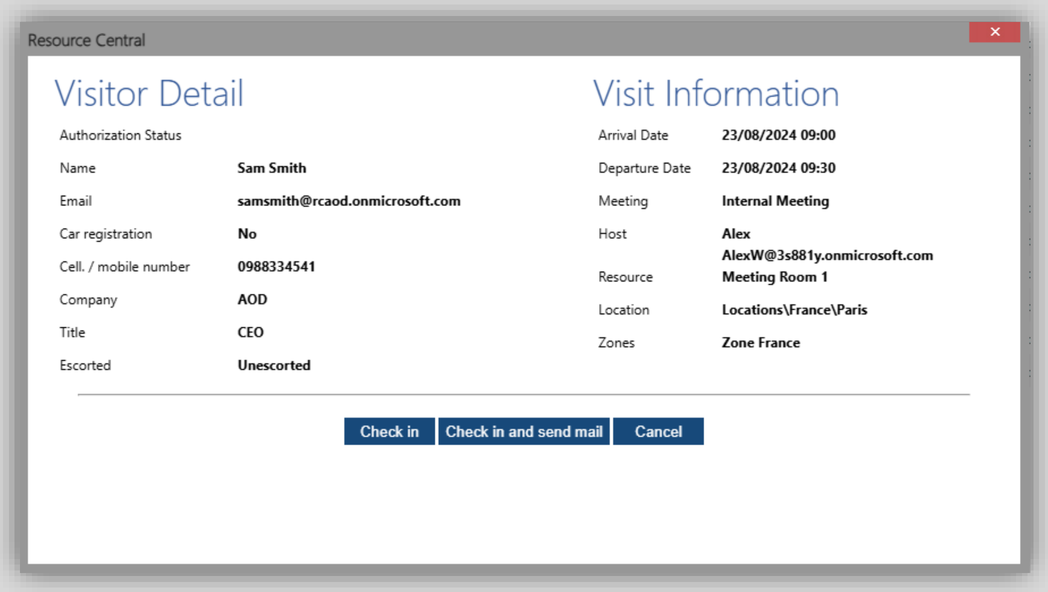
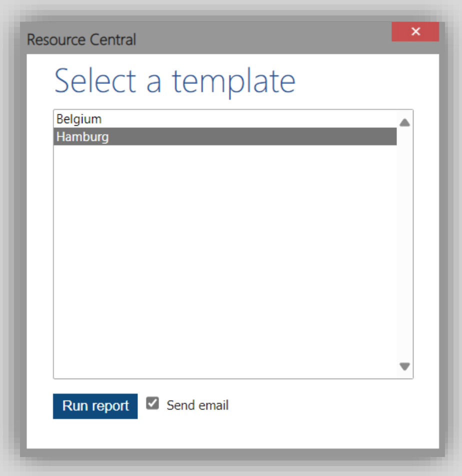
Clicking the button will open the printer interface window.

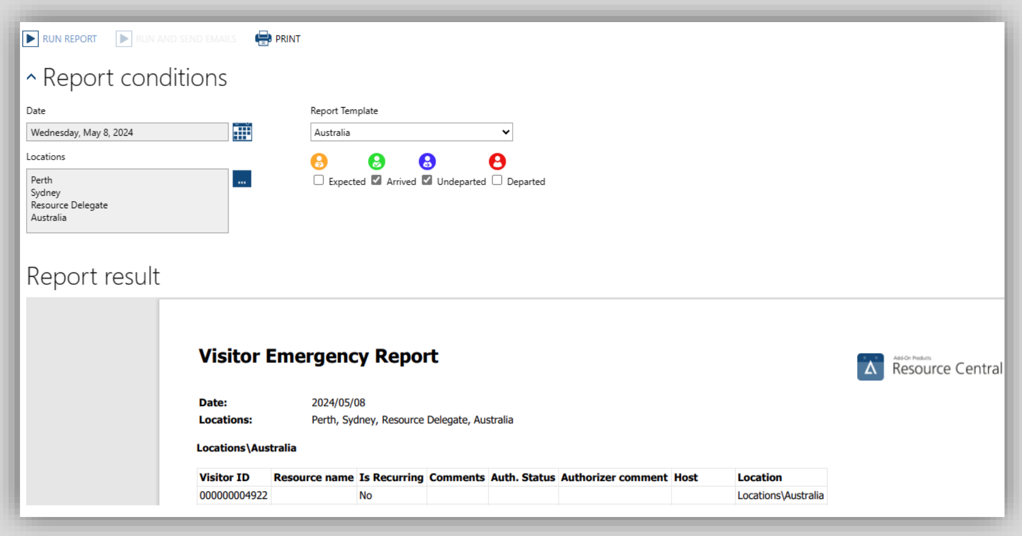
If you click [Print] on the Printer Interface window, all the badges for all those visitors who have Arrival status as ‘Expected’ would be printed, one badge per page.
</td>
</tr>
<tr>
<td>Print Badge and Check In</td>
<td>Print badges of visitors with Arrival status ‘Expected’ and check them in.</td>
</tr>
</table>

Meeting filter	Change the view of Visitors based on either: Meeting, Arrival time, Comments, Company, Visitor, or Host. 
Set Visitor Status	Select visitor(s) on the list, then choose a status on ‘Set Visitor Status’ drop-down list to apply that Arrival status to all selected visitors.  **NOTE**: You cannot change Arrival status of a visitor whose ‘Authorization status’ is not set yet. For more details, refer to Visitor Authorization section.
Enter Visitor ID	Enter the ID of a visitor in the field and click the button. It will help change Arrival status of that visitor.  The changing rule is as follows: • **Expected** to **Arrived** • **Arrived** to **Departed** • **Undeparted** to **Departed** • **Departed** to **Expected** Press [**Enter**] or icon: • If **RC.Visitors.CheckinByCode.ShowDetail.Enable** parameter is disabled, the Arrival status of that visitor will immediately change according the above rule.

	• If **RC.Visitors.CheckinByCode.ShowDetail.Enable** parameter is enabled, a screen of Visitor Details and Visit Information will appear to show who is about to check in/out, e.g.:  Then, click [**Check in/out**] and the Arrival status of that visitor will change according to the above rule. For more details of ***RC.Visitors.CheckinByCode.ShowDetail.Enable*** parameter, please refer to **RC Parameter Guide.**
Resend Code	Resend email with registration code to the selected visitors.
Hide Previous	This checkbox works in conjunction with the parameter **Visitors.HidePrevious.Minutes**. • If parameter **Visitors.HidePrevious.Minutes** is created with positive integer value in the range of (0, 180] minutes (i.e., less than or equal to 180 minutes) ➔ all visitors with arrival time < (current time – value of the parameter) will be hidden when you check on [**Hide Previous**]. • If parameter **Visitors.HidePrevious.Minutes** is NOT created or created with invalid value or with value larger than 180 (minutes) ➔ all visitors with arrival time < current time will be hidden when you check on [**Hide Previous**].

Set Authoriza-tion Status	Change authorization status of the selected visitors who have visit in your assigned locations, either Awaiting, Authorize, or Declined. • **Awaiting:** means the visitors require authorization before their Arrival status can be changed. • **Authorize:** means the visitors are authorized to visit, their Arrival status can now be changed. • **Decline:** means the visitors are refused to visit, their Arrival status cannot be changed. To be able to change a visitor's Authorization status, the persons in respective location must be assigned with the Role that can change authorization status.
Scan Code	Opens a dialogue to scan the code of a visitor e.g. the QR code. When scanned a visitor/visit information dialogue can (configurable see below) be present to show the details of the visitor that you are about to check in or out. Click on the **Scan Code** button and the camera screen appears to scan the visitor's QR code:  • If **RC.Visitors.CheckinByCode.ShowDetail.Enable** parameter is disabled, the Arrival status of that visitor will immediately change according to the above rule.

	• If **RC.Visitors.CheckinByCode.ShowDetail.Enable** parameter is enabled, a screen of Visitor Details and Visit Information will appear to show who is about to check in/out, e.g.:  Then, click [**Check in/out**] and the Arrival status of that visitor will change either arrived or departed. For more details of ***RC.Visitors.CheckinByCode.ShowDetail.Enable*** parameter, please refer to **RC Parameter Guide.**
Emergency	This function is designed to export a list of visitors who are currently checked in. Click on icon on the toolbar to run the report. If multiple report templates existsyou're your location, select an available template for the visitor emergency report and click [**Run report**].  If the report is configured with an email the check box [**Send email**] will be checked and the report result will go to the preset emails.

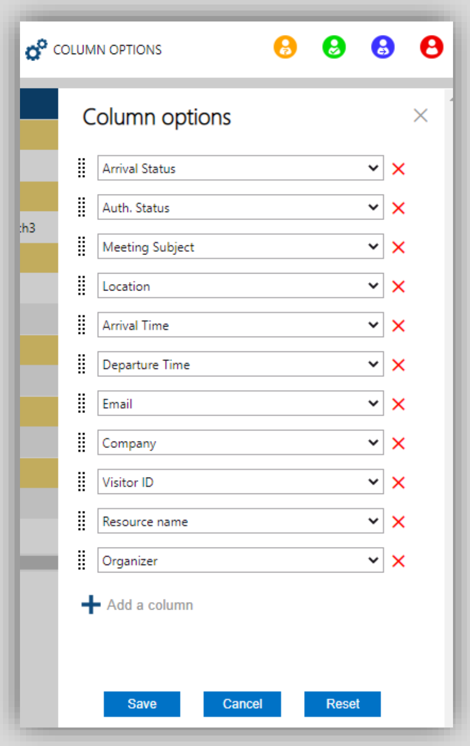


The result on the current date will be automatically exported. You must notice that the default selected Arrival Statuses for the report are ”Arrived” and ”Undeparted”. You can change the conditions under Report Conditions. Click [**Run Report**] or [**Run and Send Emails**] for a new result.

To create Visitor Emergency Report templates, refer to **Designer** → **Visitor** section in ***RC Administrator Guide*** for detailed configurations.

Column Options

You can configure your own personal column view in the Visitor overview.
You can add, delete, and change position of the columns shown on the Visitors list. The available columns depend on the Visitors fields configured in **Designer ➔ Visitors**. Once you finished your changes, click [**Save**].



<table>
<tr><td></td><td>NOTE: These changes apply per Person, and it does not affect other RC System Admin users.</td></tr>
<tr><td>Status Filter</td><td>You can filter the listed records through the Status Filter located at the upper-right corner of the toolbar (just under [Logout] Button).


By selecting either of the four status filters, the corresponding visitors would be filtered accordingly as shown below.</td></tr>
</table>

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: Notifying Contac Person by email at visitor arrival

When you mark a visitor as arrived a message will pop up asking you if you want to inform the Visitor’s Contact Person in some cases this will be the meeting organizer about the arrival of this visitor or not, as shown below:

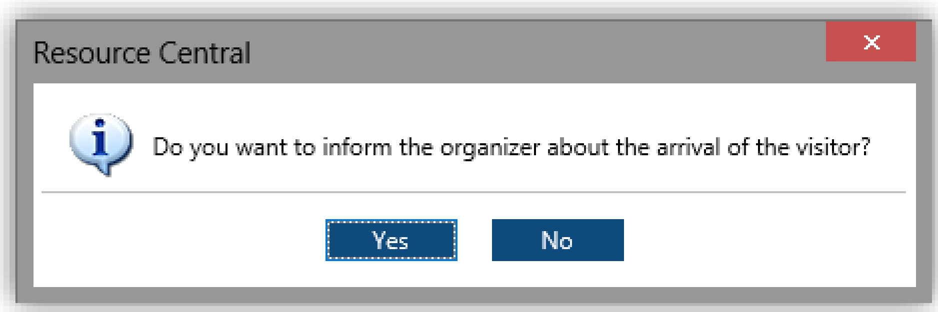


Figure 41. Visitor Arrival Notification Message

This message will only appear if the 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:

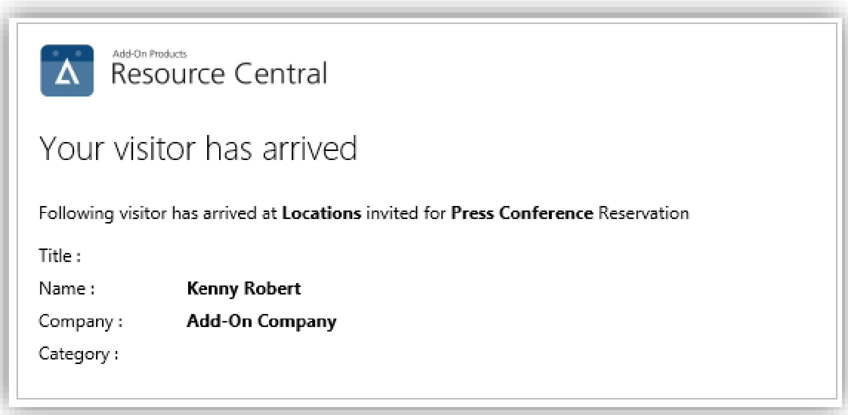


Figure 42. Visitor Arrival Email sent to the Organizer

Option 2: SMS notification enabled

RC supports sending text messages to the 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:

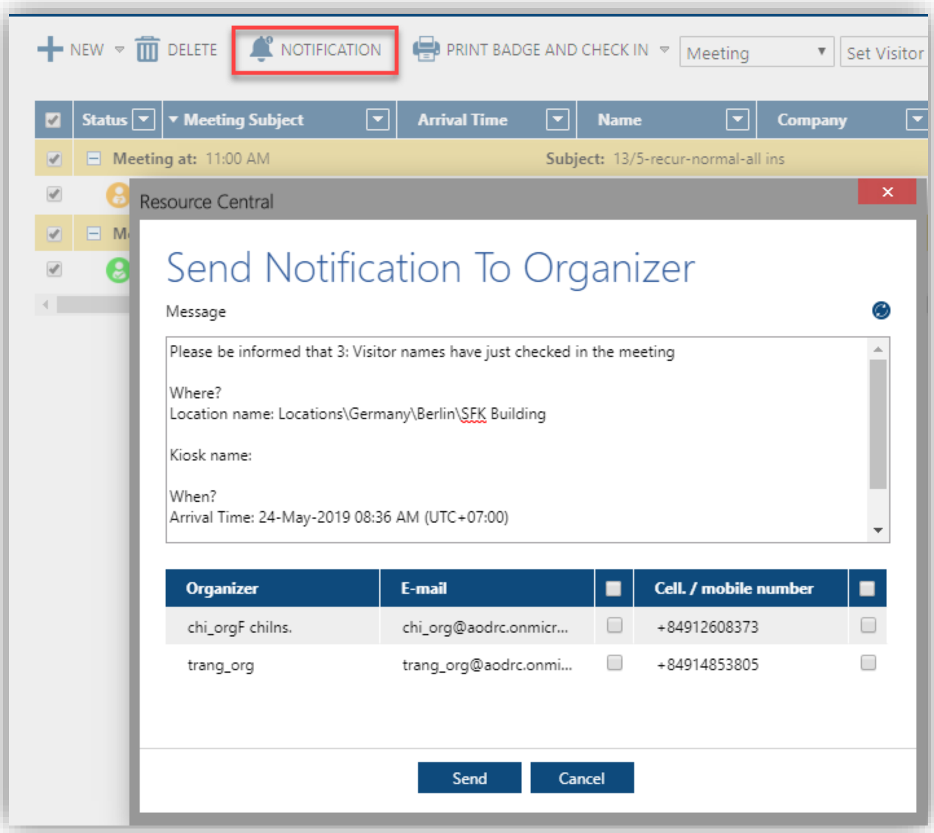


Figure 43. Configure Notification to meeting Organizer

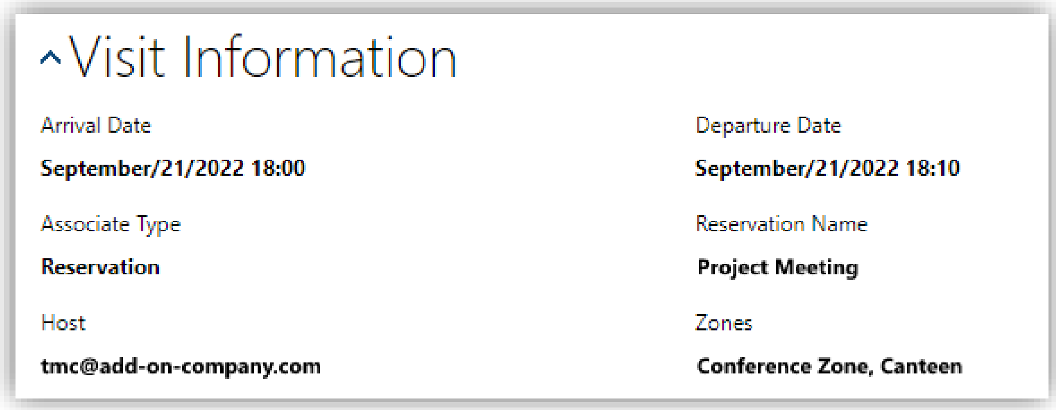
In this panel, you can select notification options (by email or text message to organizer's cell phone). After making your selection or changing the message content as you wish, click [**Send**] to finish.

Visitor Details

Click on any of the listed visitors will show the details of that visitor. It includes:

Visit Information

This section shows the visit details.



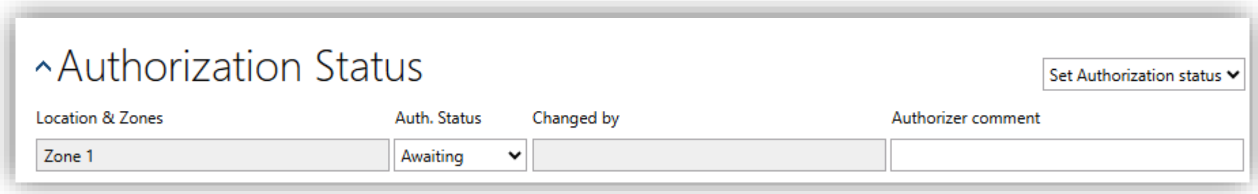
Field	Description
Arrival Date	Expected date of the visitor's arrival.
Departure Date	Expected date of the visitor's departure.
Associate Type	The associate type of the visitor.
Reservation Name	The name of the reservation that this visitor is invited to.
Host	The email address of the host who will take care of this visitor.
Zones	The zone(s) that this visitor is invited to.

If you are viewing the details of an existing visitor, the fields above cannot be edited.

If you add a new visitor via Visitors list, the fields above can be edited.

Approving Status

This section shows the Authorization status of a visitor based on location/zones that he/she is invited to.



Field	Description
Location & Zones	The name of location/zone.
Auth. Status	The current Authorization status. If you are the authorizer, you can change the status.
Authorized by	The email address of the authorizer.
Authorizer comment	The comment of the authorizer.

These fields only display the current results; thus, they cannot be edited.

Visitor Details

This section shows and allows you to edit the details of the selected visitor.

The fields displayed here depend on the ones in **RC backend ➔ Designer ➔ Visitors**, including custom visitor fields that you can create (e.g., the custom fields in the example below are ‘Reason for visit’, ‘Address’, ‘Wifi access’…). For more details on these custom fields, please refer to ***RC Administrator Guide***.

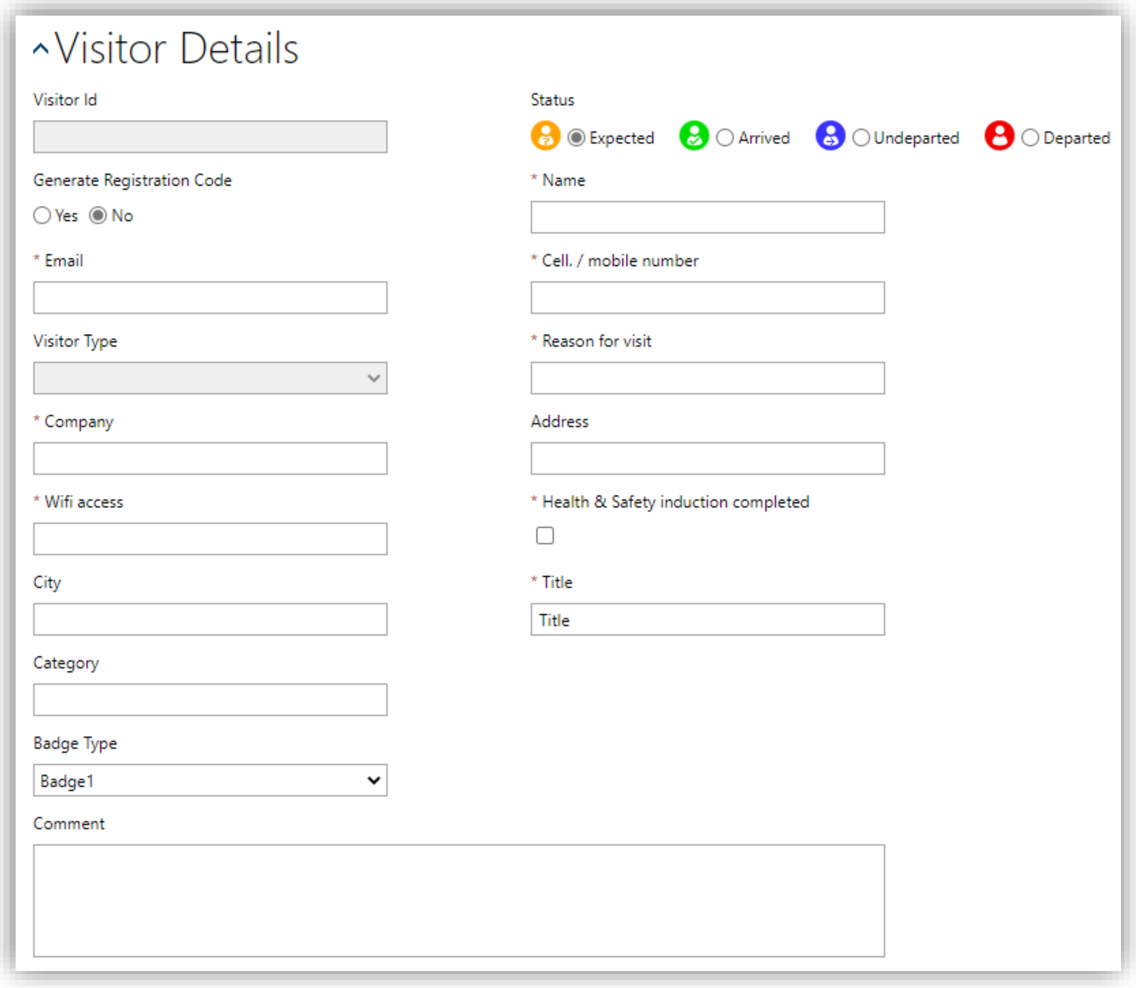


Figure 44. Details of a Visitor

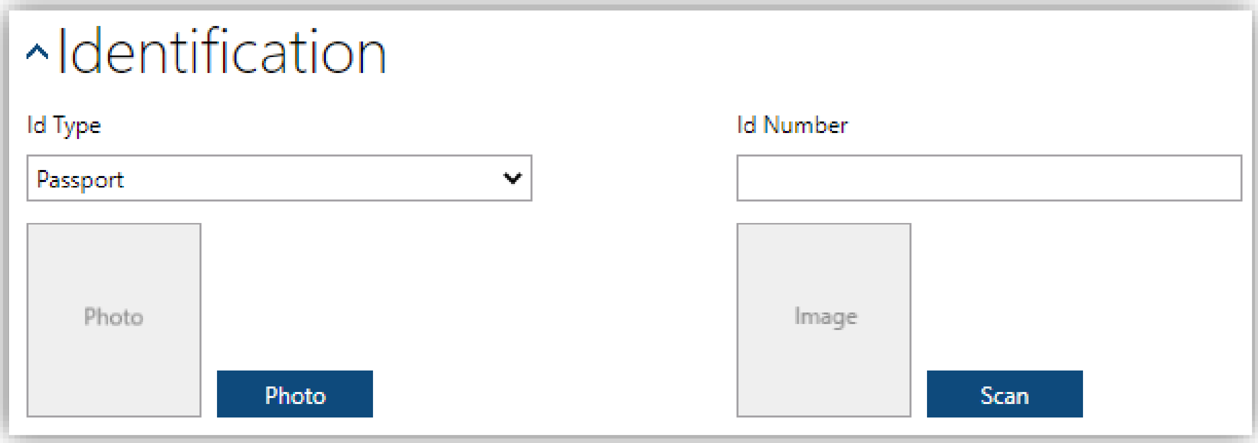
Field	Description
Visitor Id	Unique, auto-generated, non-editable barcode id for the visitor.
Status	Arrival status of the visitor. If you are authorized, you can select change this visitor’s arrival status here.
Generate Registration code	Select **Yes** to send a registration code to the visitor. The visitor can receive a reminder email of the registration code which is controlled by parameter **RC.Visitor.email.workdaysbefore**. Refer to ***RC Parameter Guide*** for more details. When the visitor attends the meeting, he will have to use this code to register on the Kiosk or at the receptionist.
Name	Name of the visitor.
Email	Email of the visitor.
Cell. / mobile number	Mobile number of the visitor.
Visitor Type	The type of visitor.

	This field can only be edited by authorized persons.
Company	Company of the visitor
Title	Title of the visitor.
Category	Category of the visitor.
Badge Type	Select one among the badge designs that match with the location where the visitor will arrive.
Comment	Comments about the visitor.

Toolbar Buttons	Description
LIST	Go back to the list of visitors
SAVE	You can save all your changes to the visitor's data
PRINT BADGE AND CHECK IN	Print badges of visitors with status "Expected" and check them in
PRINT BADGE	Clicking this button, the printer interface would open which will directly print the badge
PREVIEW	The badge would be shown for preview purpose in a separate window, according to the badge type selected, with a Print button
SAVE CONFIGURATION	The values in all of the fields will be saved so that the next time when the user clicks NEW to create a new visitor, all of the fields will be pre-populated with those saved values. **NOTE:** This will only be applicable over the current screen. The impact of this functionality will not be displayed over the Attendees section at the Order Form. By default, the button is enabled, but it can be disabled using the parameter **Visitor.DisableSaveConfiguration**. Refer to ***RC Parameter Guide*** for more details.
VISIT DETAIL	Open the 'Visit Detail' page which shows the information of the visit that the visitor attends to, and the details of all visitors in that visit. If you are the organizer, you can also edit the visitor's details. **NOTE:** Certain information changes will reset the visitor's Authorization status to 'Awaiting'.
RESEND CODE	Resend email with registration code to selected visitors.

Identification

This section shows the identification of the visitor.



Field	Description
Id Type	Type of Identification document.
Id Number	Number of the Identification document.
Scan	Scan and preview the document.
Photo	Scan and preview the photo.

NOTE: It is recommended that you utilize the Photo option to capture portrait photos and the Scan option to capture documents.

When you click [**Photo**] button, the following pop-up page will appear, and you can select the source if you have more than 1 webcam connected. The interface will assemble the following figure:

Figure 45. Twain Interface for the application

You may use this function to photograph a person. When you stand in front of the camera, you will see that the left panel displays the camera's perspective. When you press the "**Capture**" button, the portrait picture is transmitted and presented in the right panel:

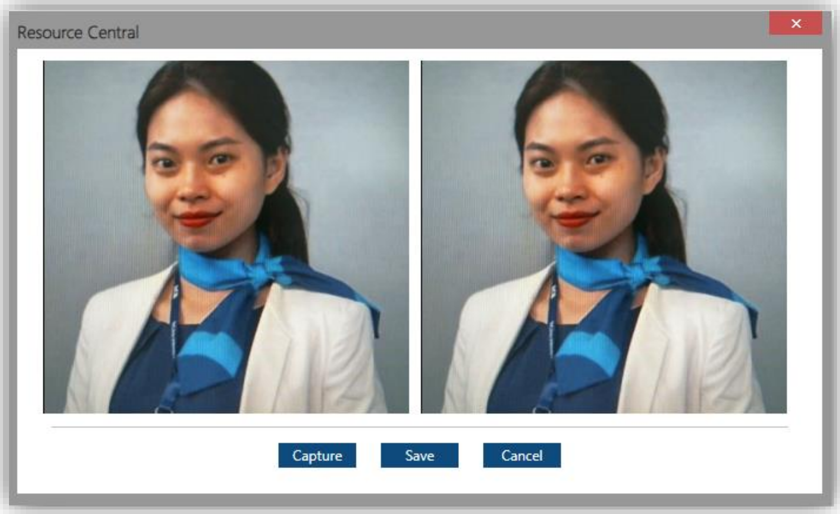


Figure 46. Preview of the picture in a new window

If you click [**Save**], the image is transferred to the corresponding frame in Visitor's details page:

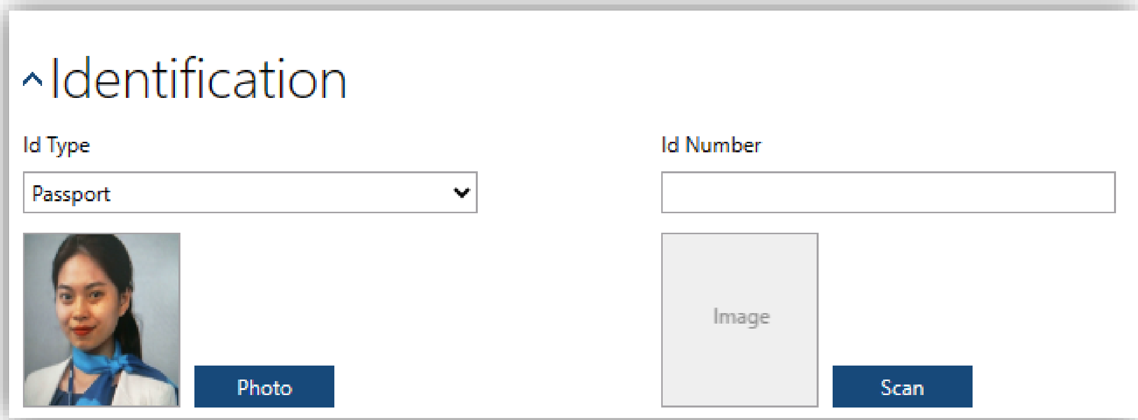


Figure 47. Picture in Visitor details

When you click "**Preview**" at the toolbar, the badge for this visitor would be printed according to the badge format specified in the Badge Type control, as shown below:

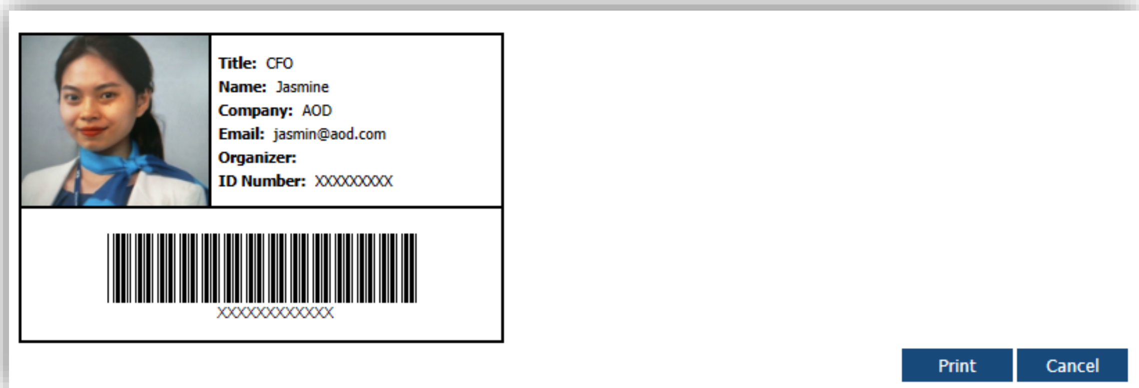


Figure 48. Badge for the Visitor

If you select [**Scan**], a pop-up page will appear that consists of 2 windows. Select the supported webcam and bring the document near to it. The image of the document is displayed in the left window. Hold the document still and wait for the webcam to identify the content part of it. Press “**Scan**” and only text area of the document will be captured and presented in the right pane.

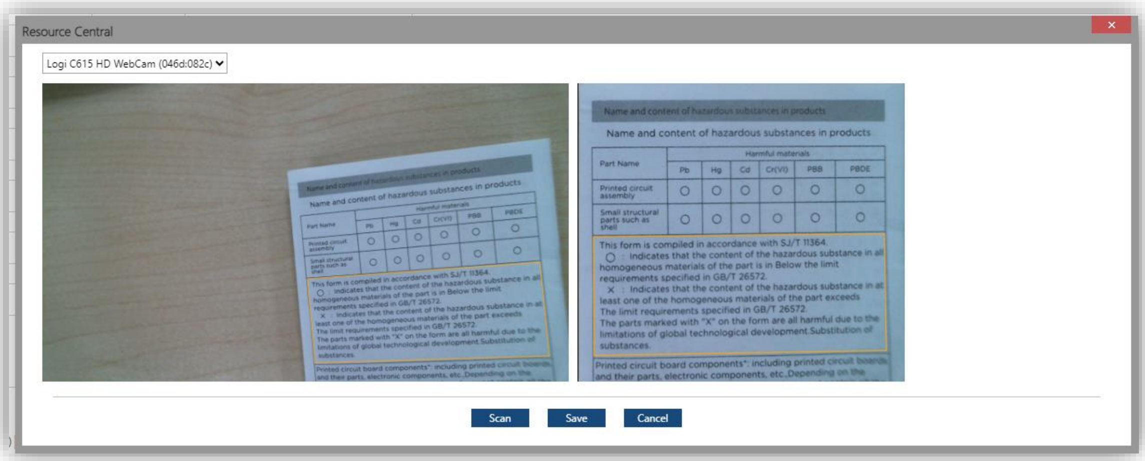


Figure 49. Scan feature

Select [**Save**] to return to New Visitor screen and you now see the capture of the document thumbnail:

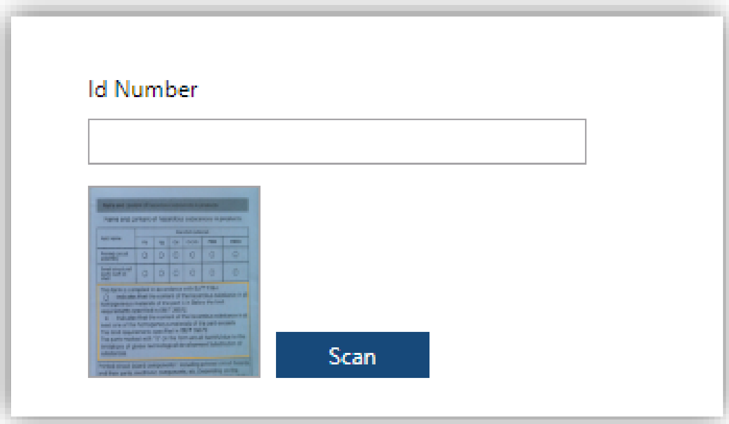


Figure 50. Scan document in Visitor details

Visitor Authorization

If the locations require visitor authorization (set in **RC backend ➔ Location ➔** a location’s **Properties**), visitors who are registered for those locations will have their ‘Authorization status’ set as **Awaiting** to wait for the authorization by the Persons in the respective locations who have visitor authorization role.

The visitor authorization right can be given to a role in **RC backend ➔ Security ➔ Role**. Then that role can be assigned to the Service Provider so that he/she can authorize visitors registered for his/her locations/zones.

Their Arrival status is still set as ‘Expected’ and it cannot be changed until they get authorized (in other words, they need to get approval first before they can actually visit the premises).

Notification email to visitor authorizer

When the visitors are registered by organizers, a notification email will be sent to persons with Location or Zone Authorizer role (they must be designated to the same locations where the visit takes place).

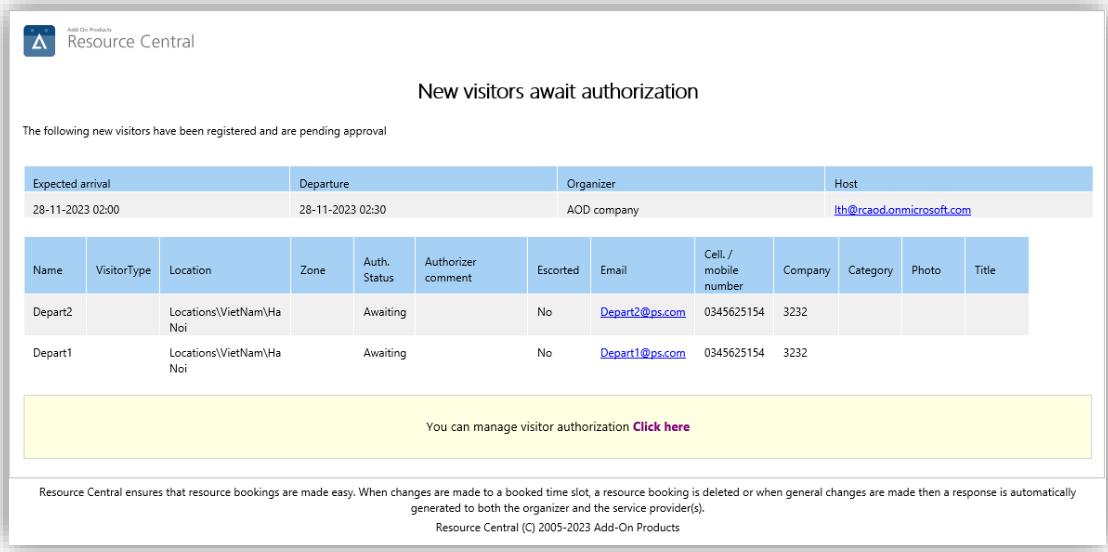
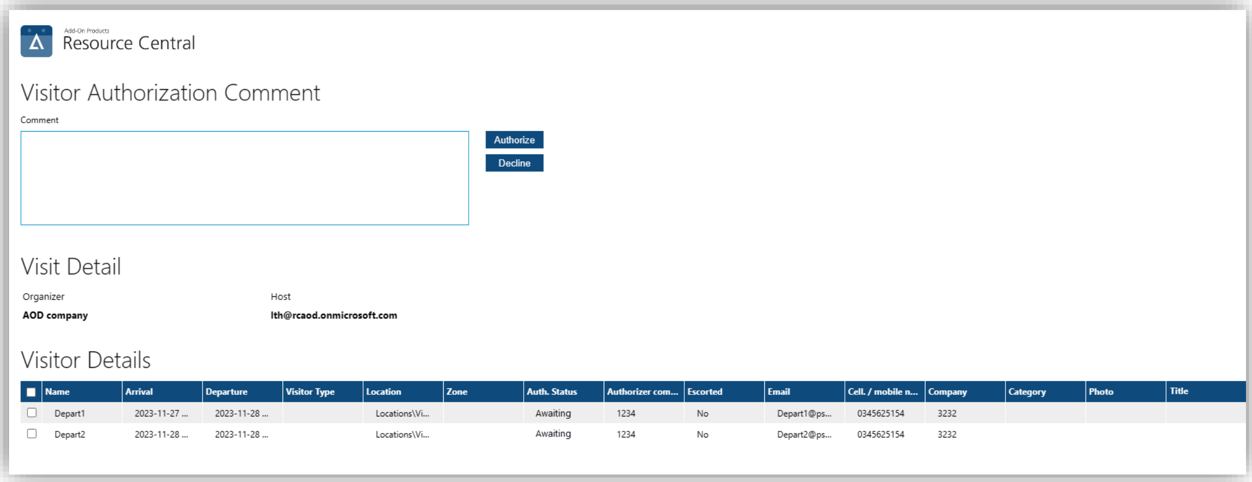


Figure 51. Notification email to visitor authorizer

Click on [**Click here**] will open the authorization screen as follows:



The 'Visitor Details' shows the zones & locations that require authorization. Here, the authorizer can only check the zones & locations that he/she is designated. After checking the location zones, the authorizer can give comment on 'Visitor feedback' and either click [**Authorize**] or [**Decline**].

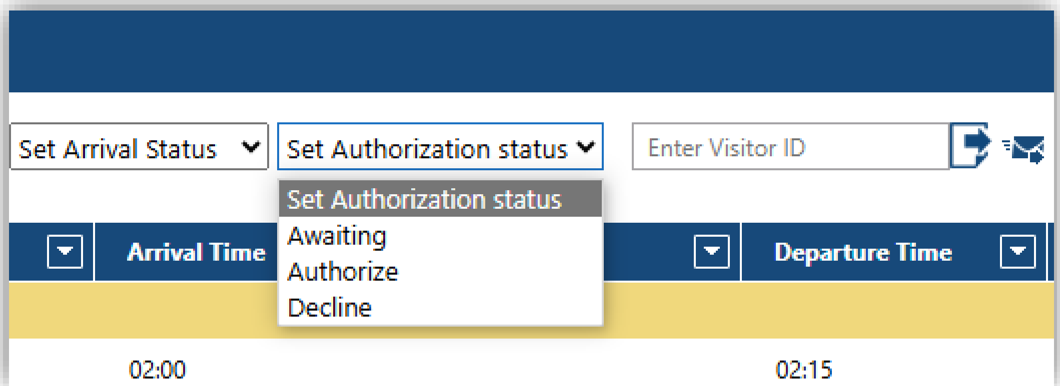
- If **authorized**, the visitor's status on **Daily Tasks ➔ Visitors** will be changed to 'Authorized'. Then their 'Arrival status' can be changed.
- If **declined**, the visitor's status on **Daily Tasks ➔ Visitors** will be changed to 'Declined', and their 'Arrival status' cannot be changed.

NOTE: This email will be sent to the Service Provider again if either of the following information changes:

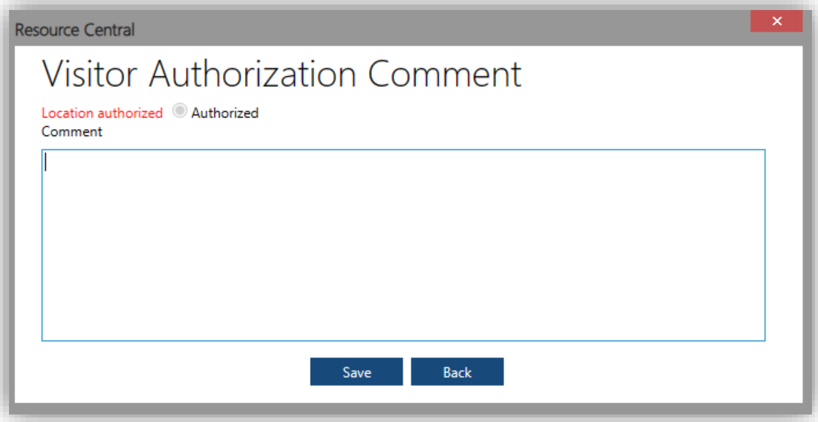
- The visit date is moved to another day. This will reset visitors' authorization status to 'Awaiting', thus they need authorization again.

- Certain information changes made to the visit, including change to new zones or locations, change of the Host, change of department name.
- Certain information changes made to the visitor, including visitor type, visitor name, escorted status.

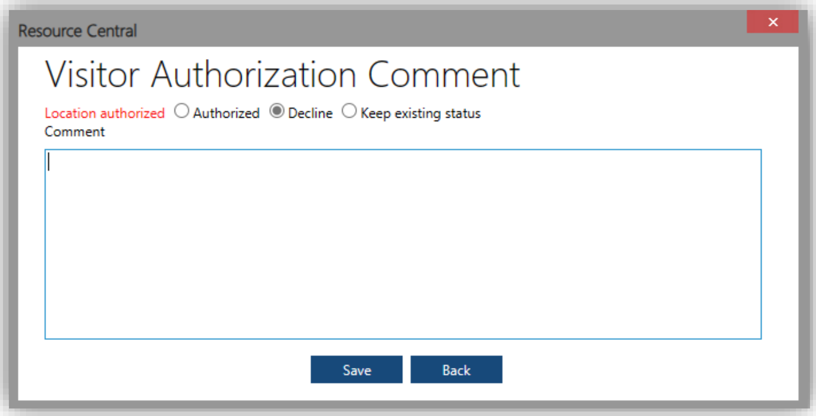
You can set the Authorization status by directing to “Visitors” category under **Daily Task** section. Here, the authorizer can only check the zones that he/she is designated. After checking his/her responsible locations or zones, the authorizer can set Authorization status.



- If set **Authorize**, the location status will be automatically authorized:



- If set **Decline/Awaiting**, the location status can be adjustable by selecting ‘Authorized’ or ‘Decline’.

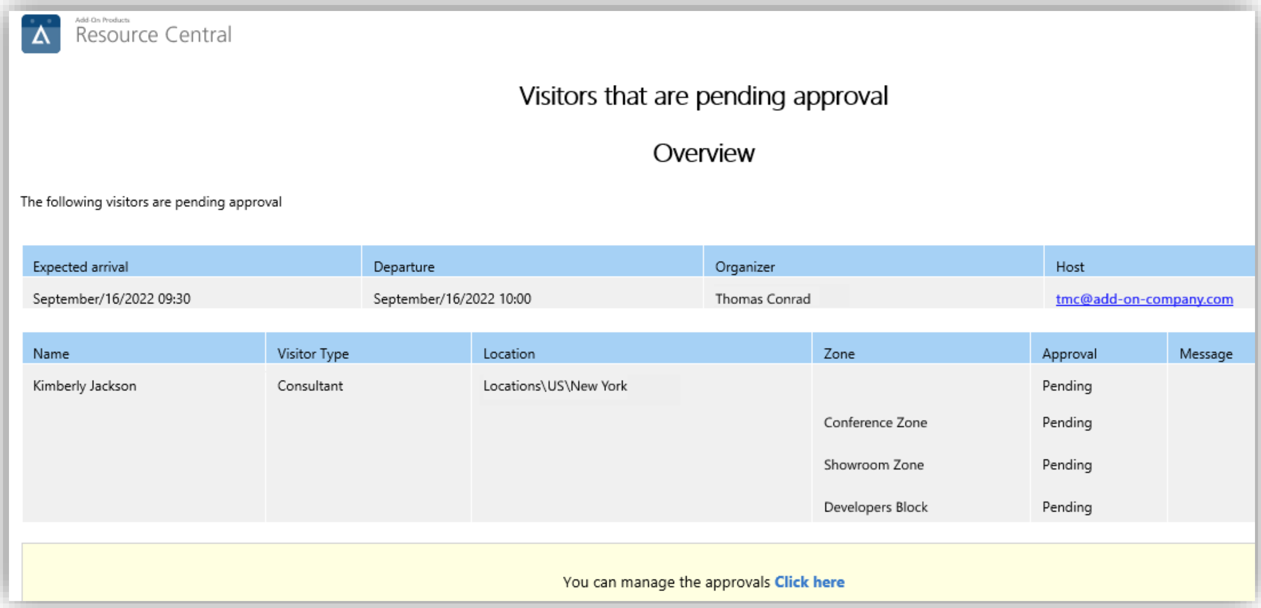


You can add Comment as desired and click [**Save**].

NOTE: If all zones are set 'Decline' a notification email will be sent to the Location Authorizer.

Reminder email to visitor authorizer

Reminder email can be set to be sent to authorizers several day(s) before visitors' arrival date in case the visitors' authorization status is still 'Awaiting'. E.g.:


Resource Central

Visitors that are pending approval

Overview

The following visitors are pending approval

Expected arrival	Departure	Organizer	Host
September/16/2022 09:30	September/16/2022 10:00	Thomas Conrad	tmc@add-on-company.com

Name	Visitor Type	Location	Zone	Approval	Message
Kimberly Jackson	Consultant	Locations\US\New York		Pending	
			Conference Zone	Pending	
			Showroom Zone	Pending	
			Developers Block	Pending	

You can manage the approvals **Click here**

Figure 52. Reminder email to visitor authorizer

Click [**Click here**] to manage the approvals.

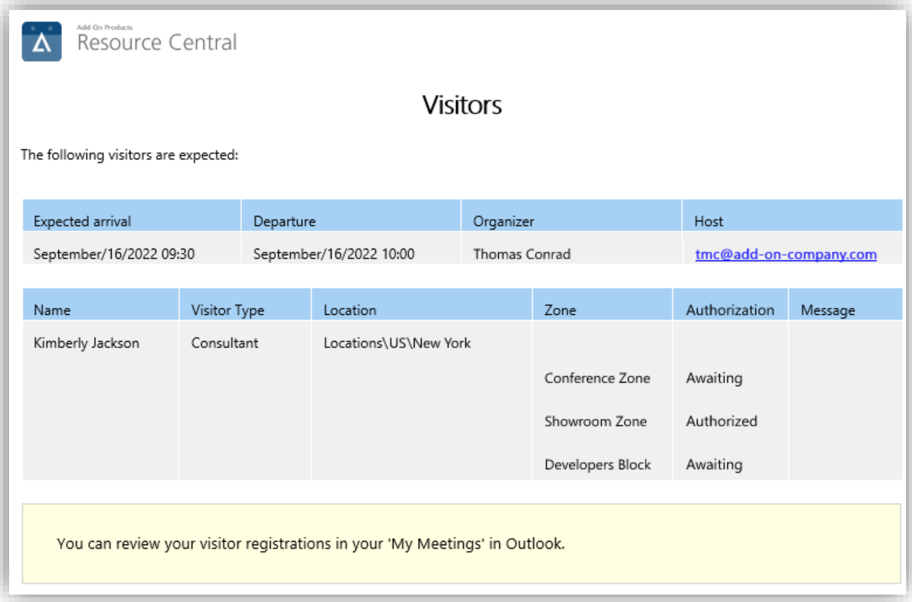
This feature is controlled by 3 following parameters:

- **Visitor.Approval.ReminderEmail.Enable**
- **Visitor.Approval.ReminderEmail.Starttime**
- **Visitor.Approval.ReminderEmail.Days**

For more details on these 3 parameters, please refer to **Parameter Guide**.

Notification email to organizer

When the visitor is authorized/declined, the organizer will receive a notification email about his/her visitor authorization status. E.g.:



Add-On Products
Resource Central

Visitors

The following visitors are expected:

Expected arrival	Departure	Organizer	Host
September/16/2022 09:30	September/16/2022 10:00	Thomas Conrad	tmc@add-on-company.com

Name	Visitor Type	Location	Zone	Authorization	Message
Kimberly Jackson	Consultant	Locations\US\New York			
			Conference Zone	Awaiting	
			Showroom Zone	Authorized	
			Developers Block	Awaiting	

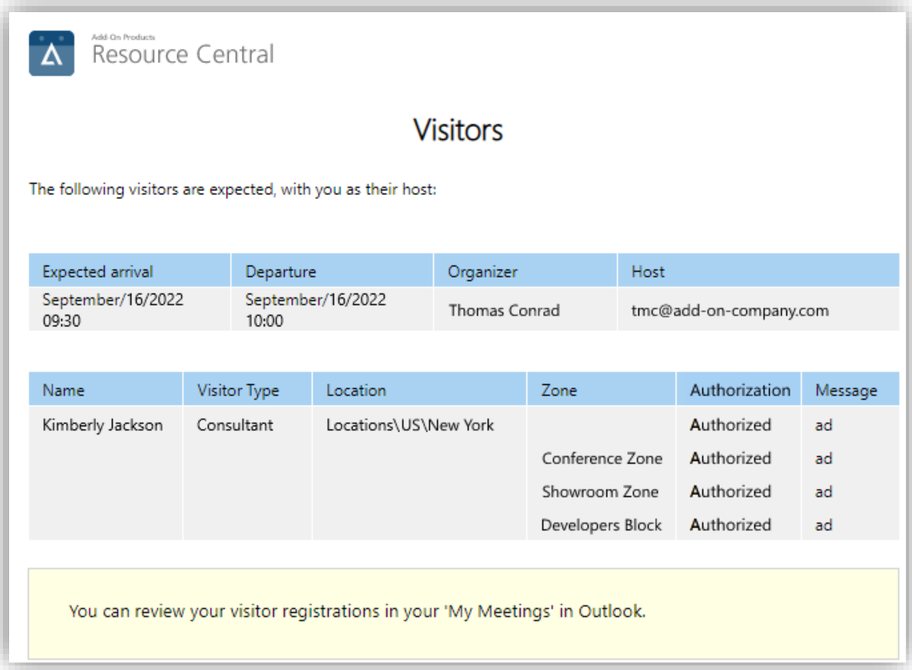
You can review your visitor registrations in your 'My Meetings' in Outlook.

Figure 53. Notification email to visitor authorizer

NOTE: This email will still be sent to organizer even if there are zone(s) or location(s) that are in ‘Pending’ status.

Notification email to the Host

If the organizer designates a Host (the organizer and the Host must be 2 different persons), the Host will receive notification email when the visitors are authorized, e.g.:



Add-On Products
Resource Central

Visitors

The following visitors are expected, with you as their host:

Expected arrival	Departure	Organizer	Host
September/16/2022 09:30	September/16/2022 10:00	Thomas Conrad	tmc@add-on-company.com

Name	Visitor Type	Location	Zone	Authorization	Message
Kimberly Jackson	Consultant	Locations\US\New York		Authorized	ad
			Conference Zone	Authorized	ad
			Showroom Zone	Authorized	ad
			Developers Block	Authorized	ad

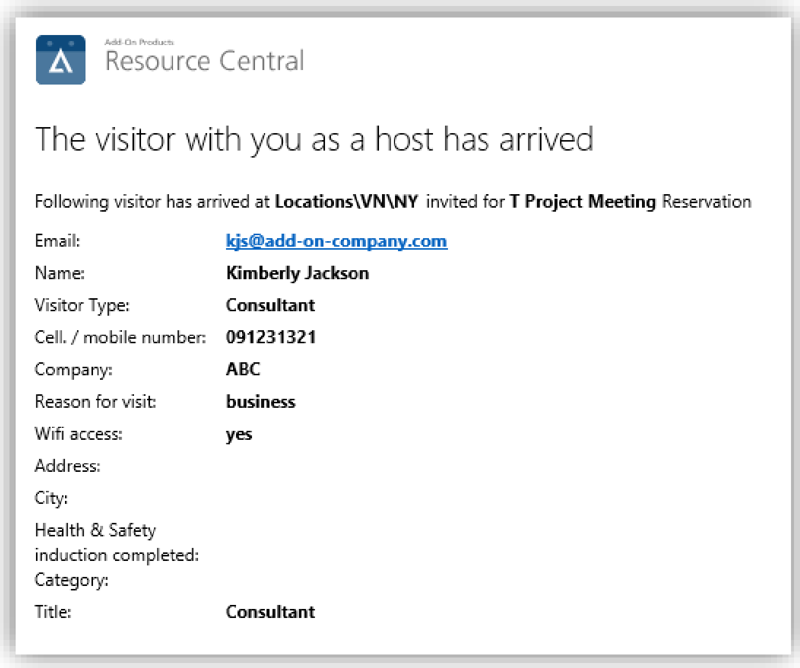
You can review your visitor registrations in your 'My Meetings' in Outlook.

Figure 54. Notification email to the Host when visitors are authorized

NOTE: This email will only be sent to the Host if all zones & locations are no longer in ‘Awaiting’ status.

This email aims to inform the person that he/she is designated as a Host to the shown visitors. If there are multiple visitors in the visit, they will all be included in the notification email above.

And when the visitors arrive, another notification email will be sent to the Host to inform him/her of their arrival. E.g.:



Add-On Products
Resource Central

The visitor with you as a host has arrived

Following visitor has arrived at **Locations\VN\NY** invited for **T Project Meeting** Reservation

Email:	kjs@add-on-company.com
Name:	**Kimberly Jackson**
Visitor Type:	**Consultant**
Cell. / mobile number:	**091231321**
Company:	**ABC**
Reason for visit:	**business**
Wifi access:	**yes**
Address:	
City:	
Health & Safety induction completed:	
Category:	
Title:	**Consultant**

Figure 55. Notification email to the Host when visitors arrived

If there is no Host added, or the Host and the organizer are the same person, then this email will be sent to the organizer.

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.