Add-On Products
Resource Central

Outlook Add-In User Guide

Document Revision 01

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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 that can track the status of orders.

Yours sincerely
The Resource Central Team

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CHAPTER 1.

Create a meeting

In Outlook®, **Outlook Add-in** assists you in creating new meetings/appointments by selecting resources, setting new orders, and inviting attendees. You can see the icon of the add-in when you create a new meeting/appointment:

In your Outlook Desktop, select **Calendar ➔ Home ➔ New Appointment**, the add-in is displayed on the toolbar:

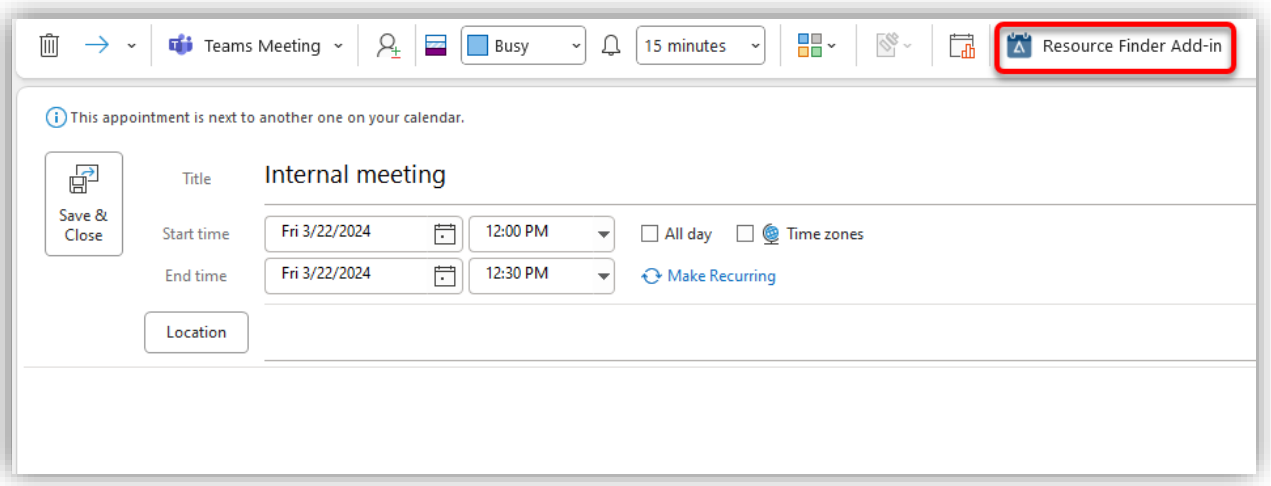


Figure 1. Room Booking - Outlook Desktop

In your Outlook on the web and New Outlook Desktop, select **Calendar ➔ Home ➔ New Event**:

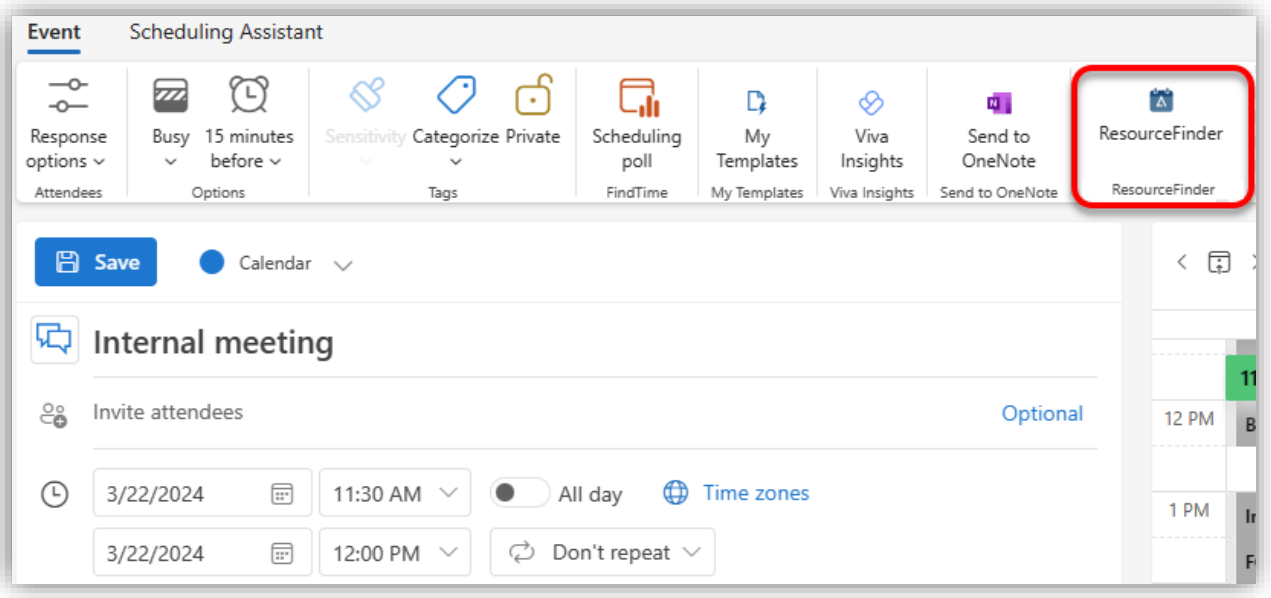


Figure 2. Room Booking - Outlook on the Web/New Outlook Desktop

NOTE: For better illustration when using **Outlook Add-in**, the Outlook desktop client will be used to describe all functionalities.

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

CHAPTER 2.

Use Outlook Add-in to find a meeting room

The **Outlook Add-in** will assist you in locating the meeting rooms that will fulfill your needs easily and intuitively.

Normal bookings

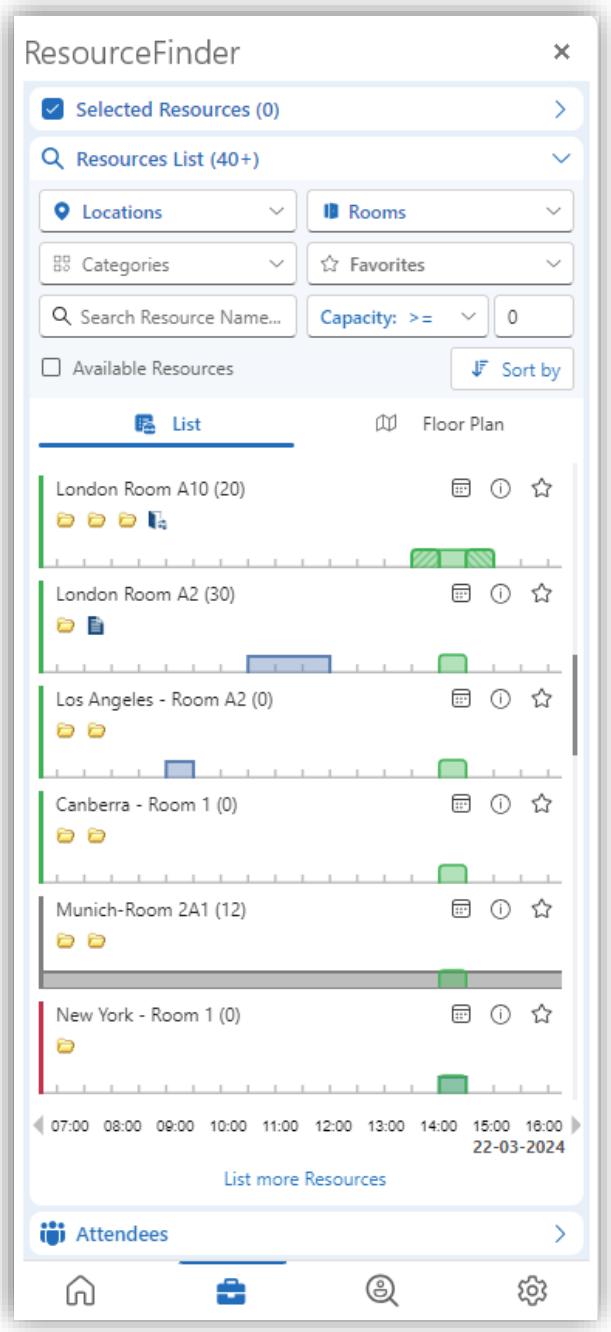


Figure 3. Outlook Add-in

Control buttons:

	Home button displays the selected Resource(s) as well as the list of attendees
	Resources button, which is the default interface when you select **Outlook Add-in**, helps you pick the resource.
	Find Colleague button is a way for you to book a resource by locating your colleague.
	Attendees button shows the list of attendees.
	Open Settings
	Booking this resource requires approval by the resource's delegate. Your request will be forwarded, pending approval.
	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.
	Show Resource list
	View Resource Details
	Add Resource to My Favorites
	View Calendar
	Show Floorplan
	Remove the resource

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

Figure 4. Buffer time

1. Use the **Resource List** to find a meeting room. You can filter the available room based on the Locations, Categories, Capacity, etc., saving your time when searching for the right room.
2. The **availability** of the meeting rooms will be displayed on each resource on 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:

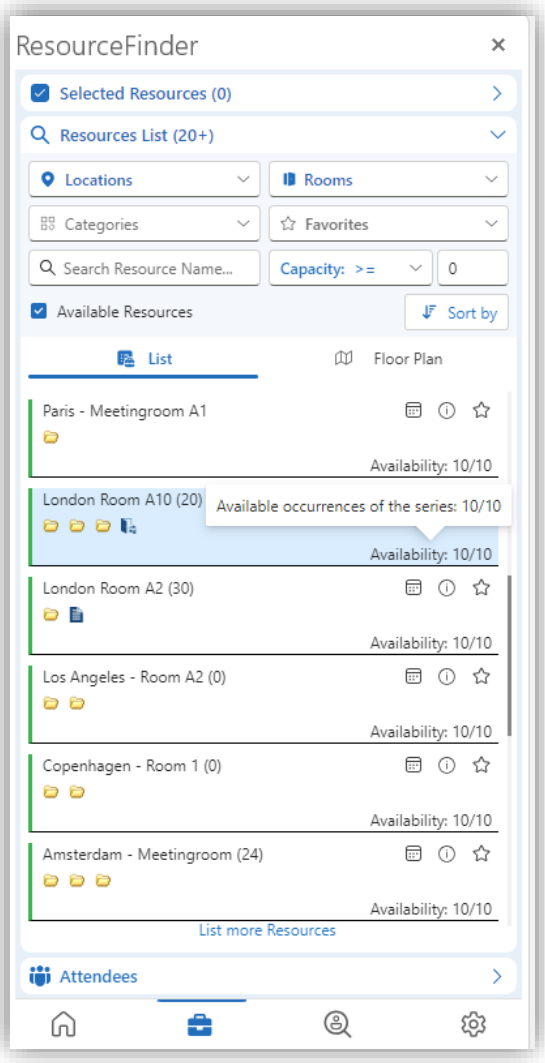


Figure 5. Book a recurring meeting

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

There are vertical bars highlighted in *red* on the left of the panel showing if the resource can be booked except for conflicted occurrence. For example, 'Availability: 9/10' means that you are going to book a recurring meeting of 10 occurrences, 9 of which do not have conflicts.

The *green* vertical bar shows that the resource can be booked for your recurring meeting. The grey vertical bar also prevents you from booking that resource because you do not have permission to book it.

Select [**Only list available resources**] to show the resources that you can book (green vertical bar only).

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

Selecting a room will move the room to the 'Location' field and to the selected resources area of the add-in:

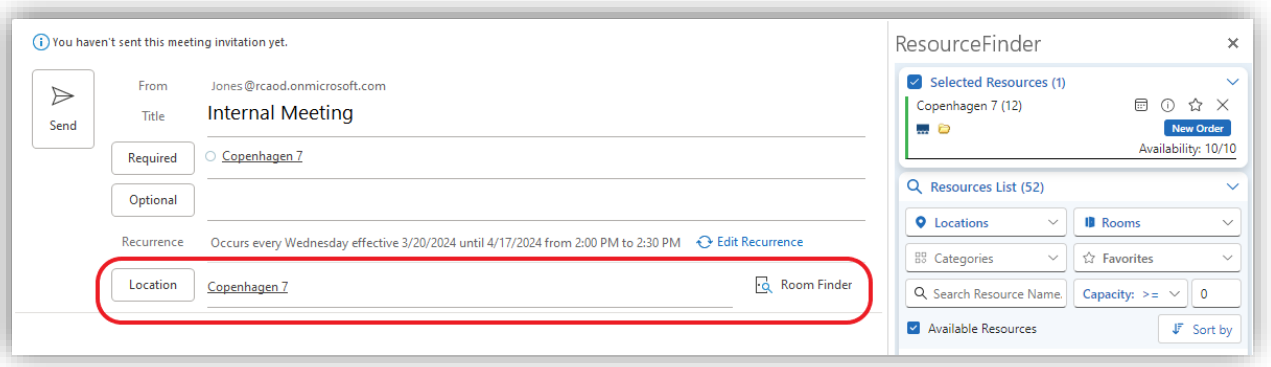


Figure 6. Selected rooms in Outlook Add-in

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 the ***RC Parameter Guide***. When it is enabled, you can see the [**Floor Plan**] icon adjacent to each location and on each resource (that has attached floor plan).

Select [**Floor Plan**] on the **Outlook Add-in** interface ➔ click on the Location bar to open the location list ➔ Choose the Location you would like to book reservation. Then, the floor plan of that reservation will appear. You can click directly on the ***Green*** area *(Available)* to book and that chosen resource will turn to ***Yellow*** *(Selected)* and be shown in the *Selected Resources* list.

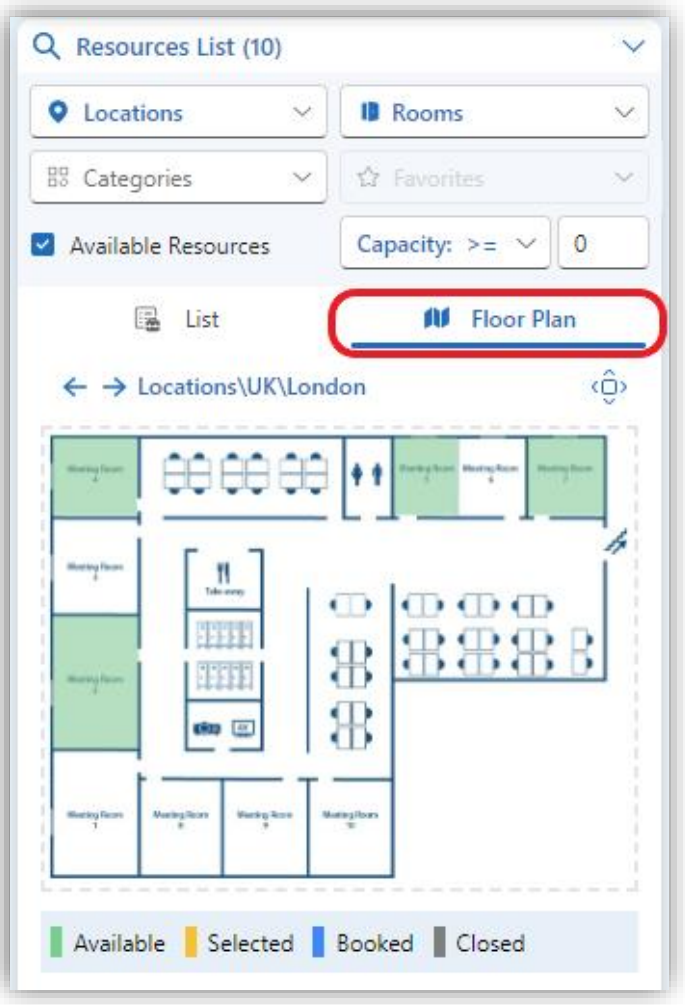


Figure 7. Floor plan

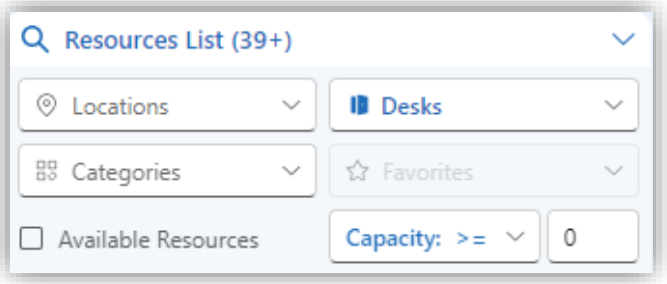


Figure 8. Floor Plan Filter

You can also find a resource by selecting its location and/or categories and the capacity as you wish. Select [**Apply**] to see the corresponding resources, then click on the green area of the location to book it.

Find Colleague

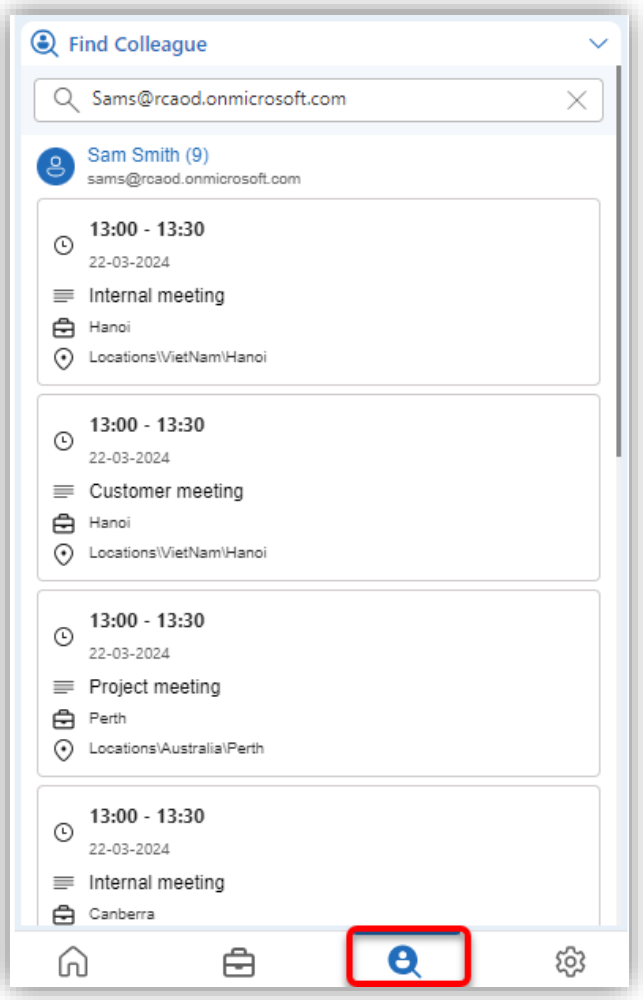


Figure 9. Find colleague tab

You can also use the **Find Colleague** option to find and book a resource that your colleagues have already booked.

On the **Find Colleague** tab, enter a part of the colleague's name, a list of the persons that matches your keyword is displayed, followed by all their events. By default, you can find your colleague by searching their name. Alternatively, you can also use their email instead.

The Start time - End time, Start date - End date, the meeting subject, the resource name, and the location of each event are displayed on this screen so that you can easily select the appropriate meeting you are looking for.

Click on the event of your colleague and you can see the meeting room/desk that your colleague will sit is highlighted in ***Orange*** on the floor plan.

You can only press on the ***Green*** *(Available)* spot next to him/her and your chosen spot will turn to ***Yellow*** (*Selected).* The resource you have just selected will be displayed in *Selected Resource* section.

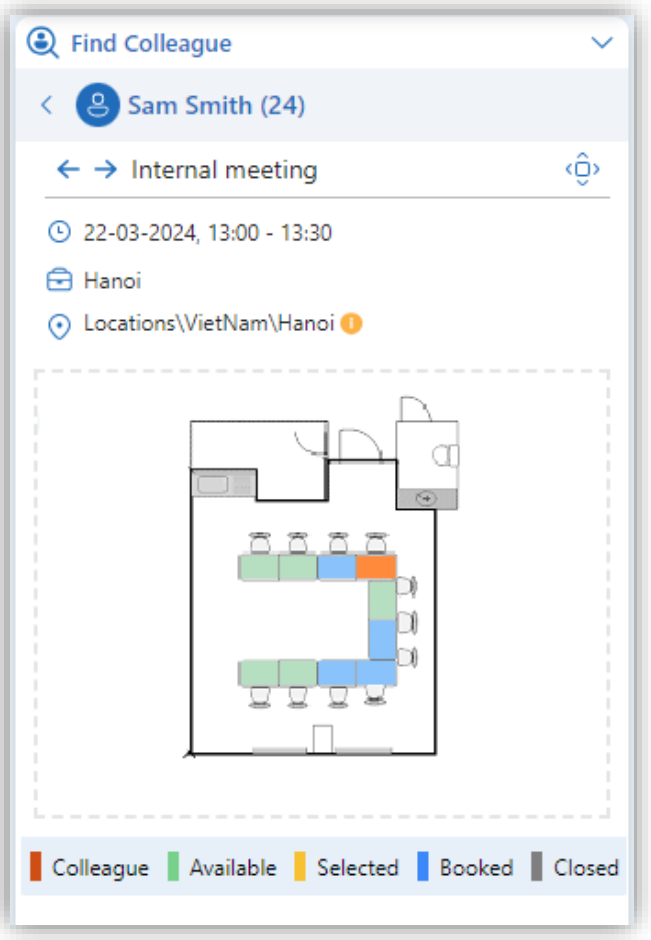
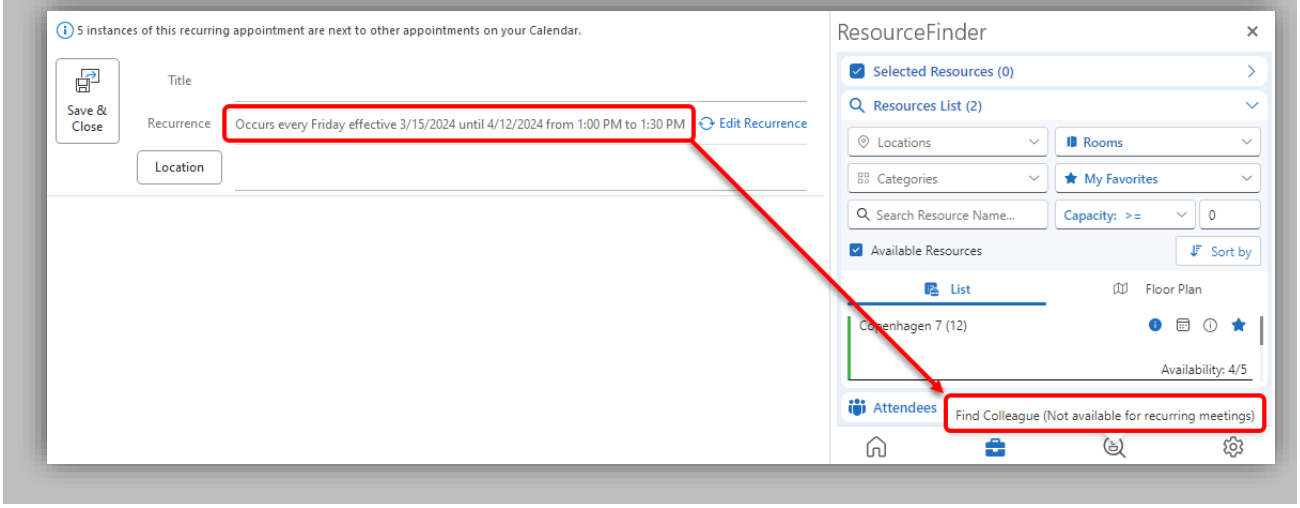


Figure 10. Colleague's detailed meeting

NOTE: **Find Colleague** function is not supported for recurring meetings.



CHAPTER 3.

Invite Attendees and complete your meeting request.

At any time, you can add attendees to the meeting and the **Outlook Add-in** will adjust.
The number of attendees you add to the meeting will directly make an impact on room search: the room capacity section is automatically changed according to the number of added attendees including the organizer:

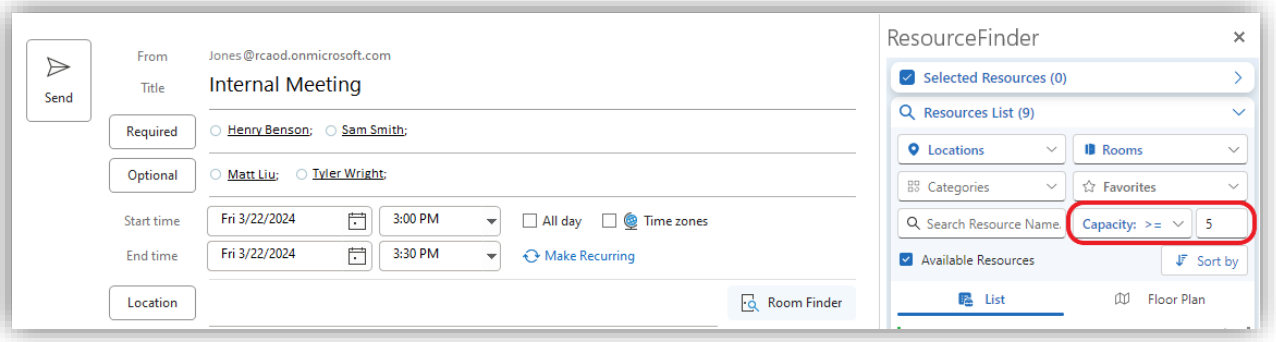


Figure 11. Attendees – Capacity

Attendees of the meeting are displayed in tab *Home* and tab *Resources* of **Outlook Add-in**.

The color vertical bar 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.

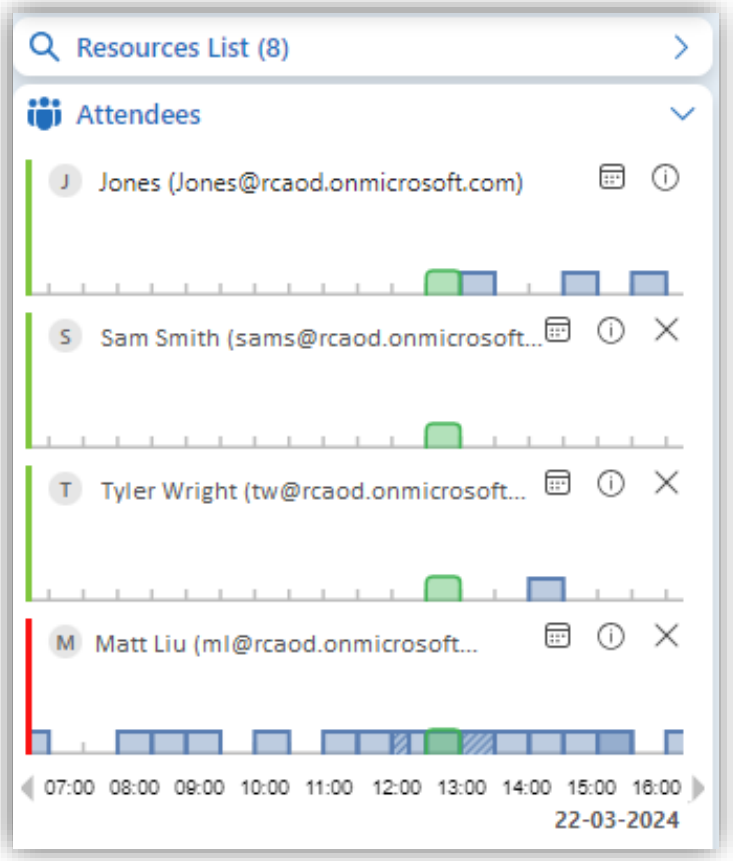


Figure 12. Attendees list

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

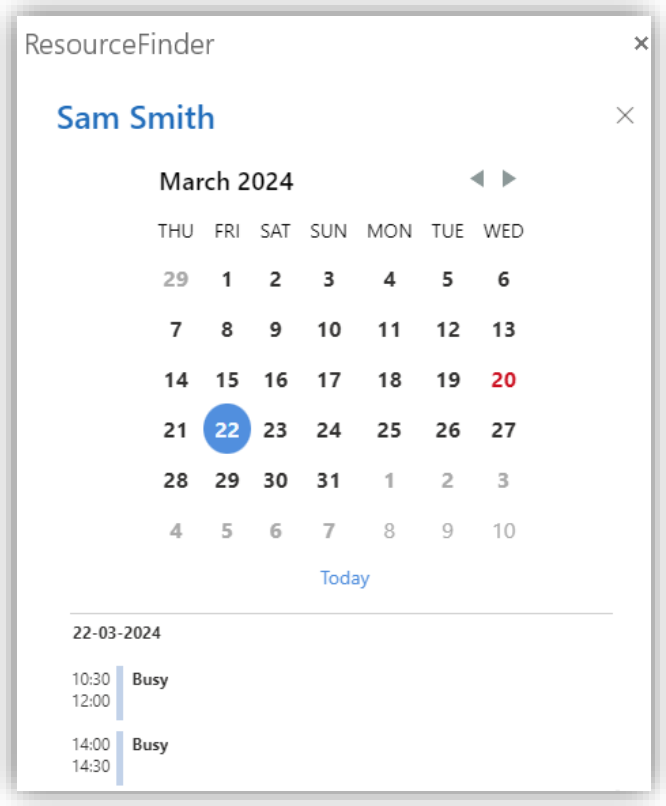


Figure 13. Attendee's calendar

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

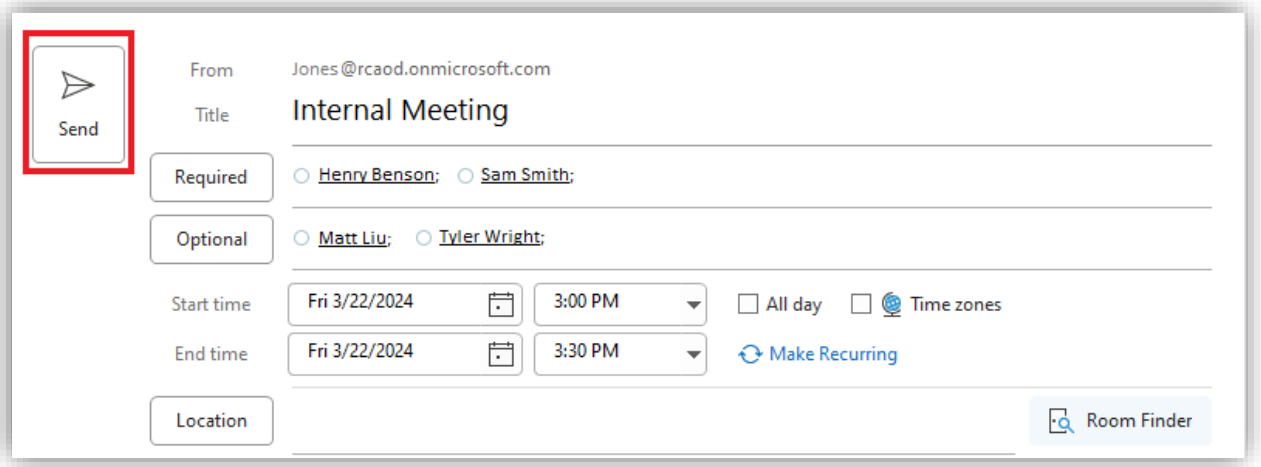


Figure 14. Meeting Request

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

Order Form

Ordering services for your meeting can either be done before sending the meeting the invite or after sending it.

Order services before sending the meeting invite.

To order services, you need to create a meeting in the calendar → click [**Outlook Add-in**] button, then choose the resource you would like to book:

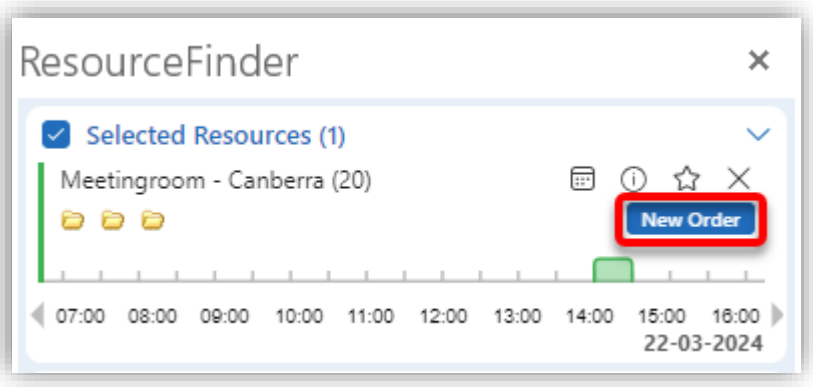


Figure 15. Book new order.

Click [**New Order**] button and the Order Form is opened in a new pop-up window:

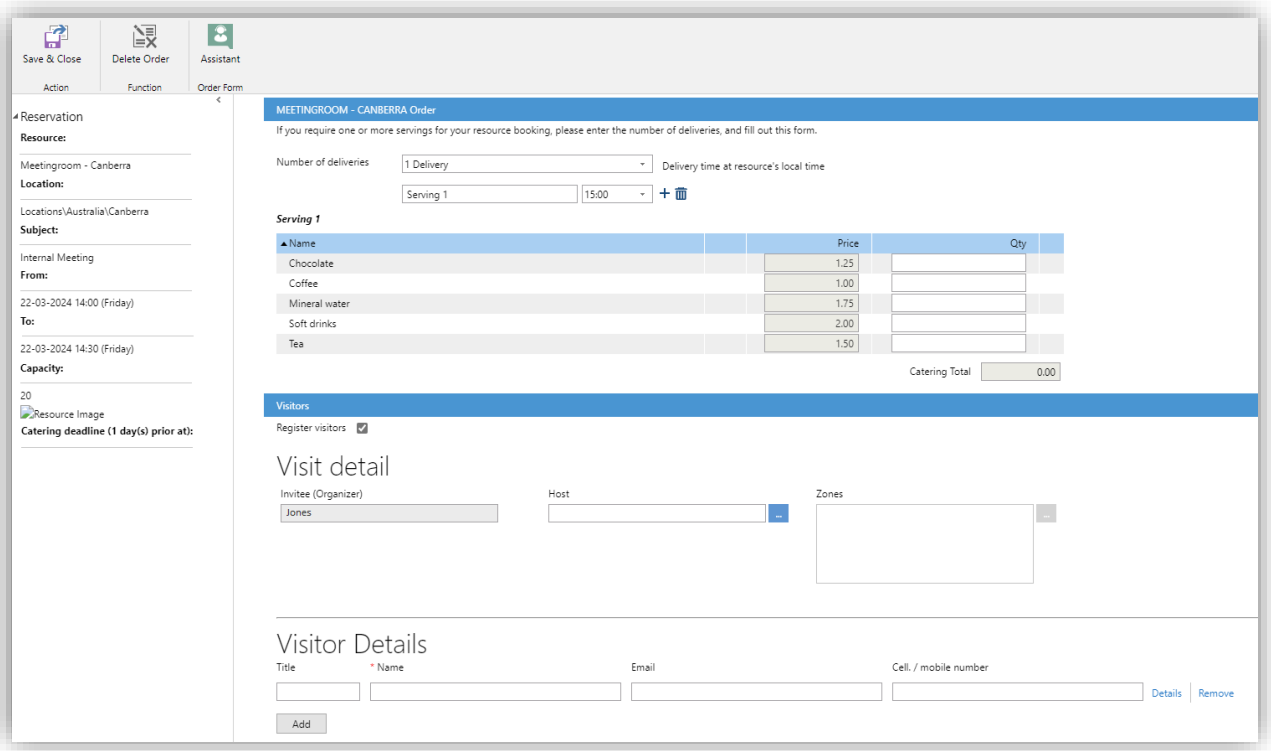


Figure 16. Order form

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.

You can also register visitors in 'Visitors' section by checking on *Register visitors* box, then enter their information. In 'Extra services for your meeting' section, you can order AV / IT equipment or utilize electronic meeting room signs. Then, click [**Save & Close**] to return to 'Outlook Appointment' screen and send the invitations.

Order services after sending the meeting invite

If you have sent a meeting invite without adding an order yet, you can still open the order form in the email from Resource Central. You will find a summary of the reservation regarding the selected meeting room, the time slot, and a link which enables you to order associated services for your meeting. This is identified with the "**Click here**" hyper-link.

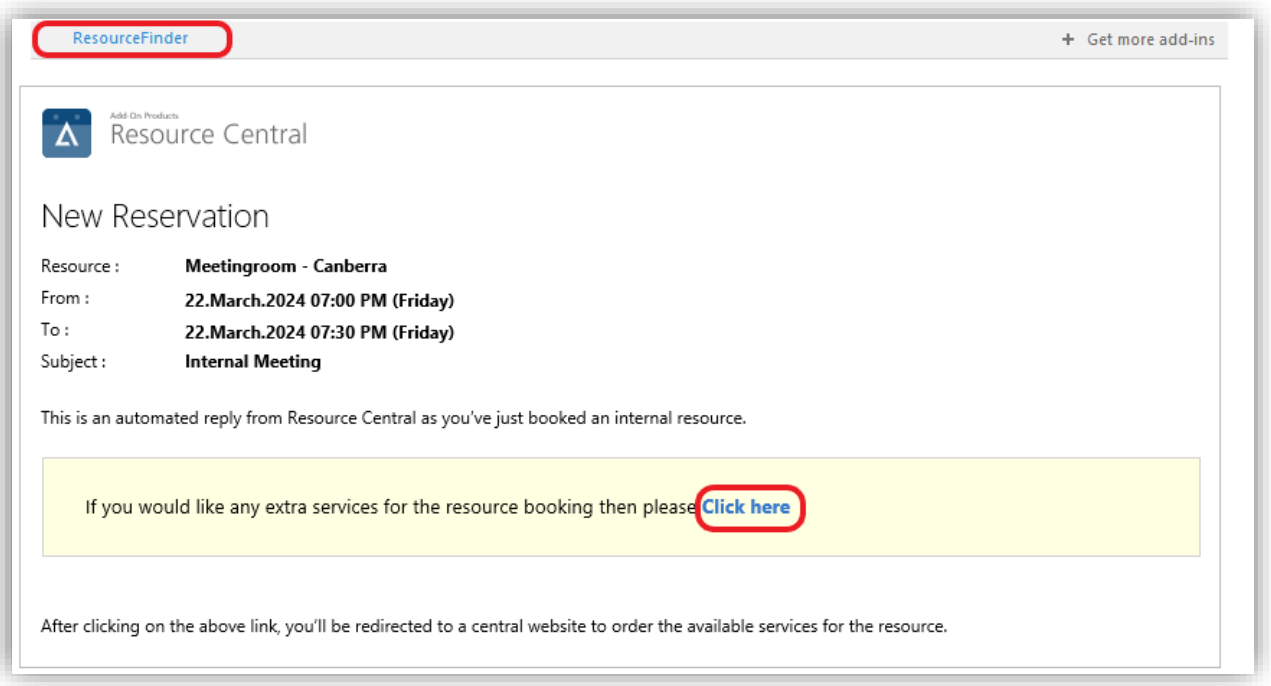


Figure 17. Open Order form from New Reservation Email

There are two (2) ways to open an order form which belongs to the selected meeting room. This will feature the services enabled for this particular meeting room.

The first way to open order form is to click on [**ResourceFinder**] 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:

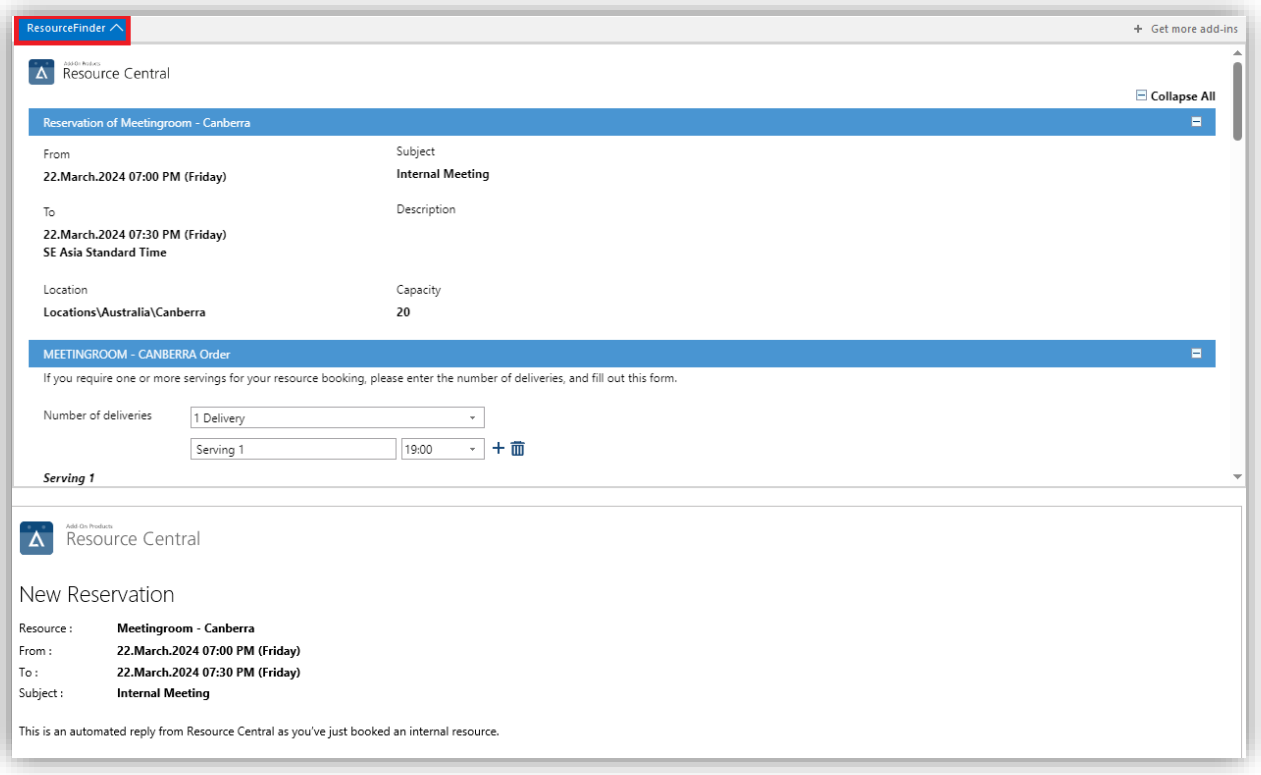
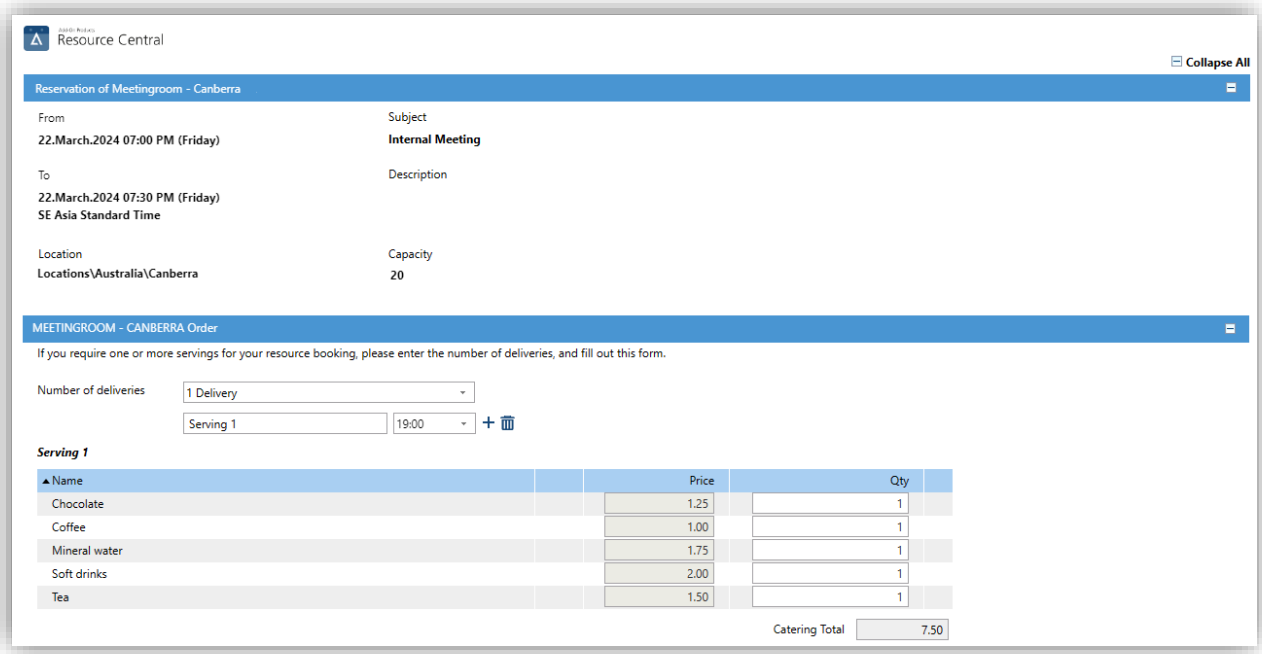


Figure 18. Order form opened from Outlook Add-in button.

The second way to open the order form from the new reservation email is clicking on the [**Click here**] hyperlink. The order form featuring all the associated services available for the meeting room you've booked will display on the web browser:



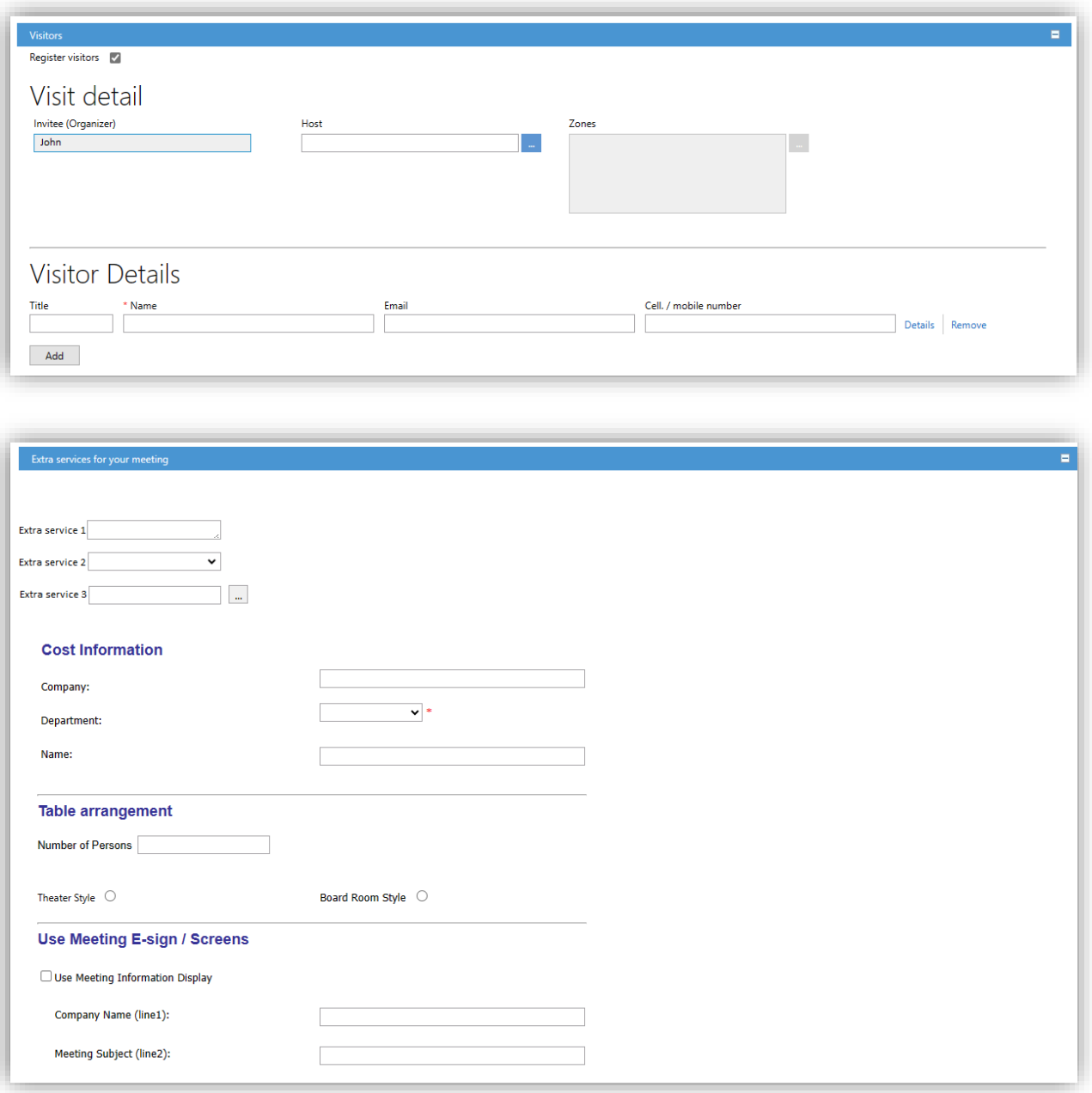


Figure 19. Order Form opened from [Click here] button

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.

If you book a recurring meeting, the order form will assemble the following figure:

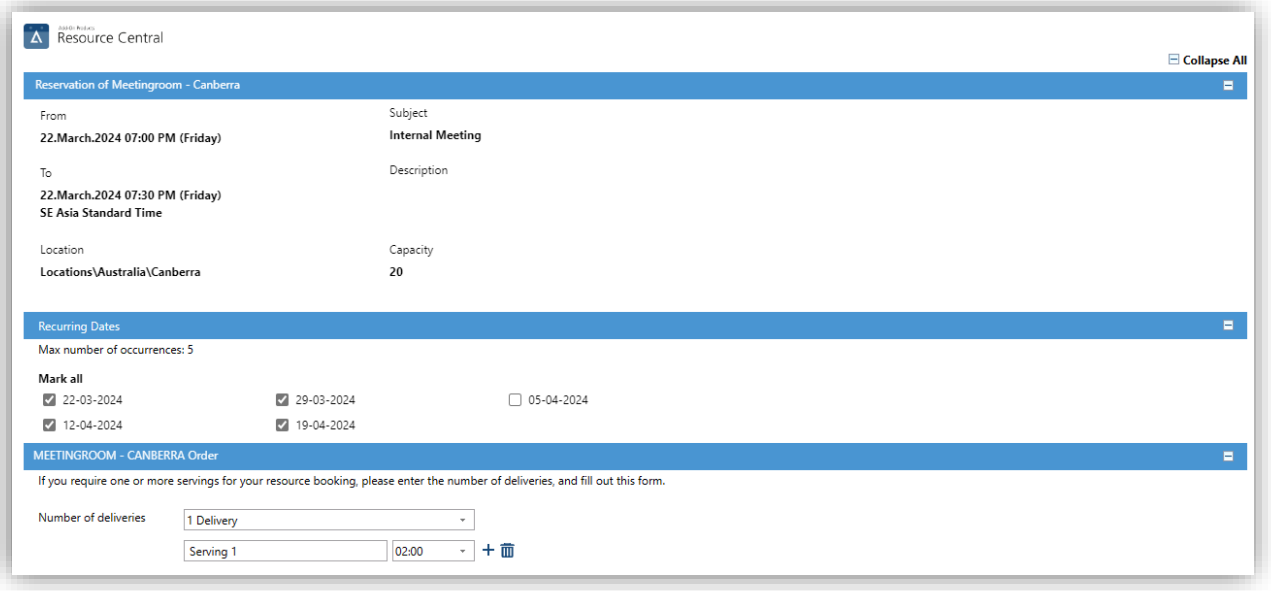
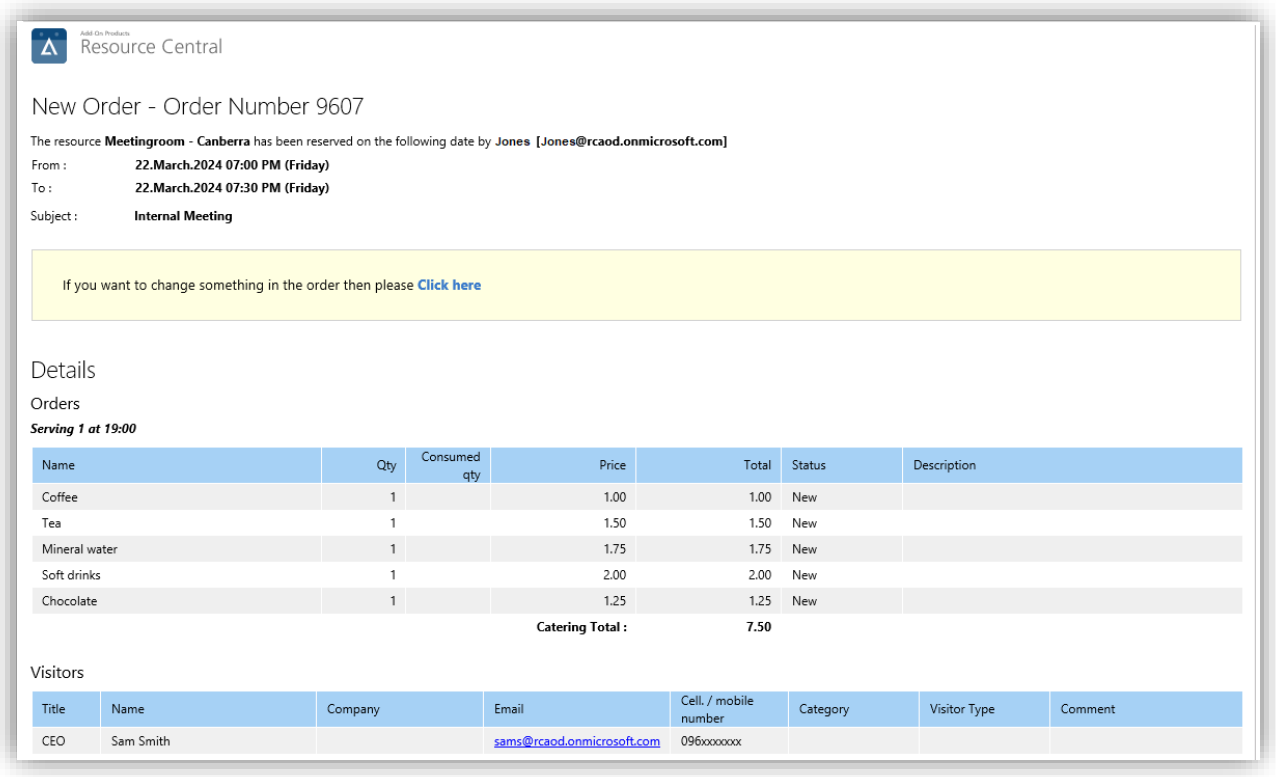


Figure 20. Recurring meeting Order Form

Order Confirmation

After placing the order, you will receive a confirmation email with a detailed summary of your order.



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New Order - Order Number 9607

The resource **Meetingroom - Canberra** has been reserved on the following date by **Jones [Jones@rcaod.onmicrosoft.com]**

From : **22.March.2024 07:00 PM (Friday)**
To : **22.March.2024 07:30 PM (Friday)**
Subject : **Internal Meeting**

If you want to change something in the order then please **Click here**

Details

Orders

Serving 1 at 19:00

Name	Qty	Consumed qty	Price	Total	Status	Description
Coffee	1		1.00	1.00	New	
Tea	1		1.50	1.50	New	
Mineral water	1		1.75	1.75	New	
Soft drinks	1		2.00	2.00	New	
Chocolate	1		1.25	1.25	New	
			Catering Total :	**7.50**		

Visitors

Title	Name	Company	Email	Cell. / mobile number	Category	Visitor Type	Comment
CEO	Sam Smith		sams@rcaod.onmicrosoft.com	096xxxxxxx			

Figure 21. Order confirmation

Should you at any point choose to delete or move your 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.

Outlook Add-in Settings

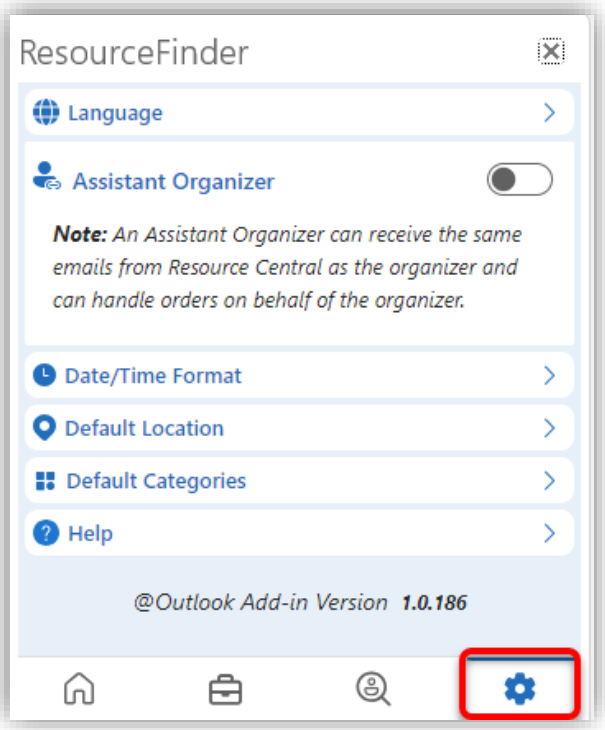


Figure 22. Settings panel

From the main screen of **Outlook Add-in**, you can open **Add-in Settings** by clicking on the cogwheel icon at the bottom right corner.

In the **Settings** panel, configurations for language, assistant organizer function, date/time format, default location, and default categories can be made.

Language Setting

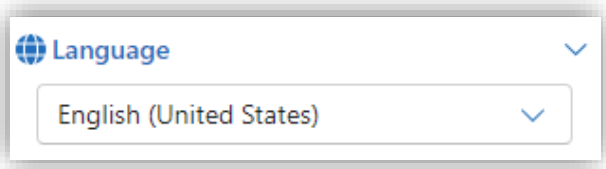


Figure 23. Settings – Language

You can make configurations for Language to be used in **Outlook Add-in** by clicking on the [**Settings**] icon at the bottom right corner of the interface.
Click [**Apply**] to finish.

Assistant Organizer

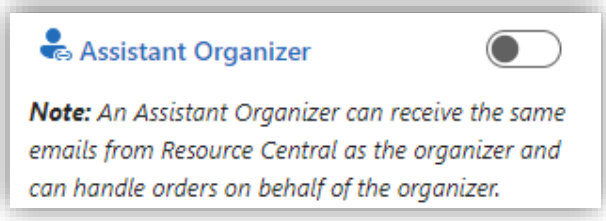
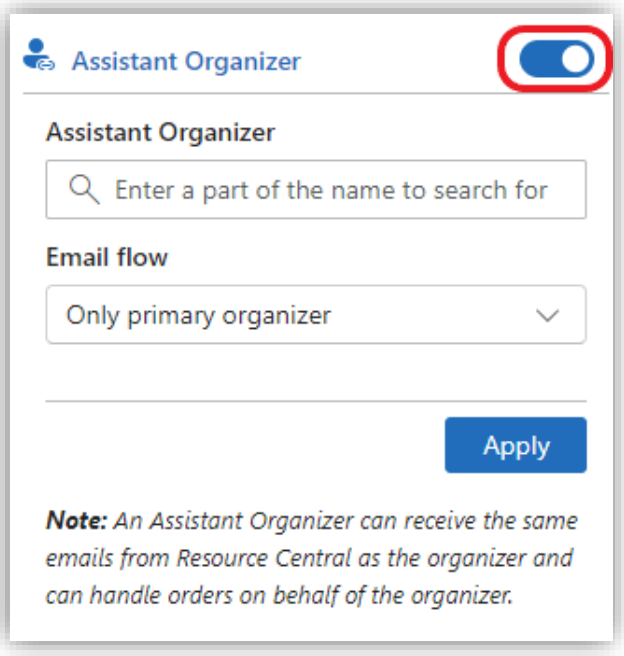


Figure 24. Settings – Assistant Organizer

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 "**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.



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

Under Email flow, you can set up 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:

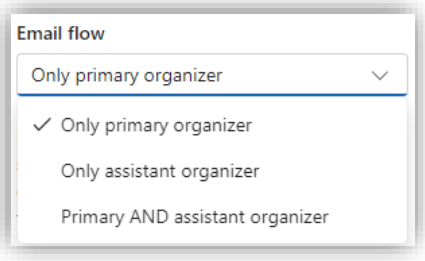
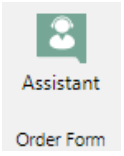


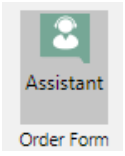
Figure 25. Assistant Organization configuration

After clicking [**Apply**], the icon **Assistant** is available in **Outlook Add-in → New Order → Order Form**.

Disabled Assistant



Enabled Assistant



Enabling the function will make the assistant organizer available in 'Meeting Organizer' section when you make a booking:

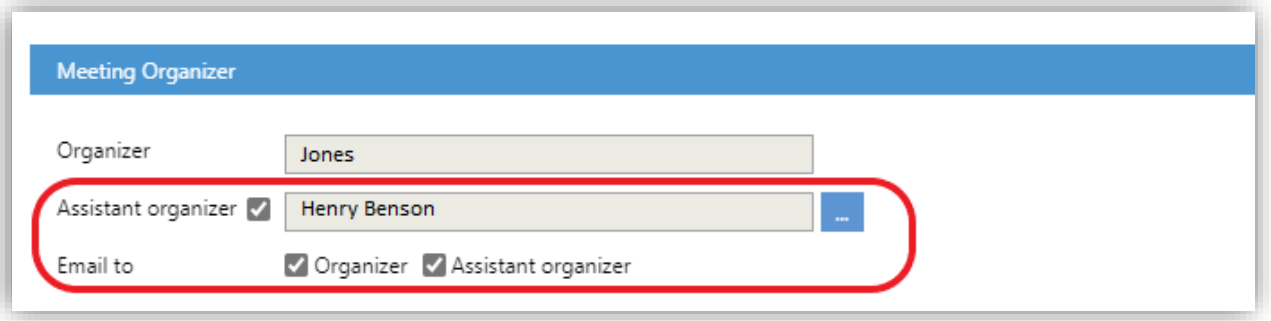


Figure 26. Order Form – Meeting Organizer

The options (assistant and email flow) established previously in **Outlook Add-in Settings** will be displayed here. You can modify them according to the need of a particular meeting or disable it if it is a meeting where you do not need an assistant organizer.

Date/Time Format

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

Go to **Settings** and scroll down to the middle of the panel, you will see the 'Date/Time Format' section.

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

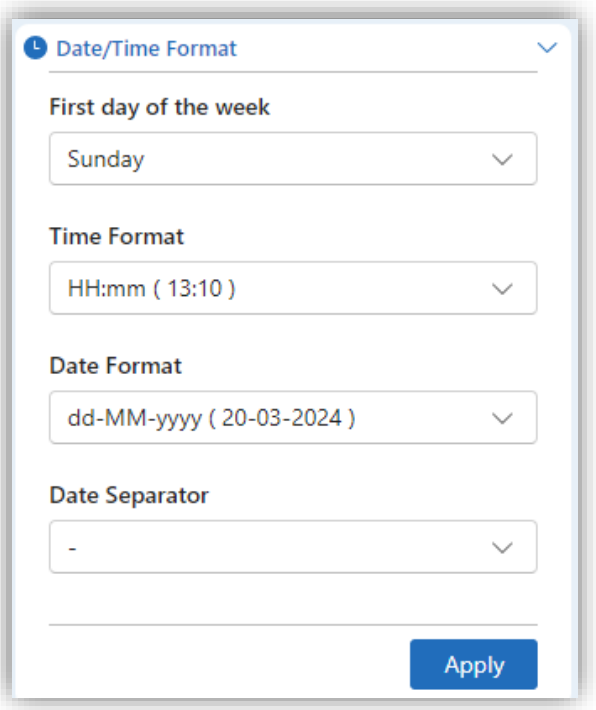


Figure 27. Settings – Date/Time Format

Default Location

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

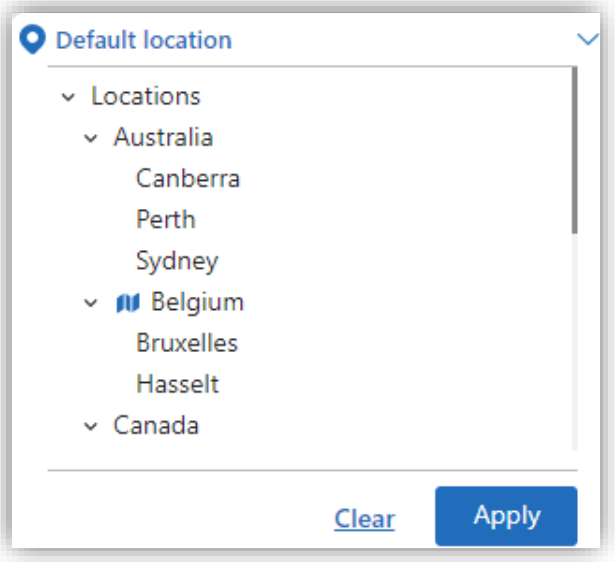


Figure 28. Default location

Default Categories

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.

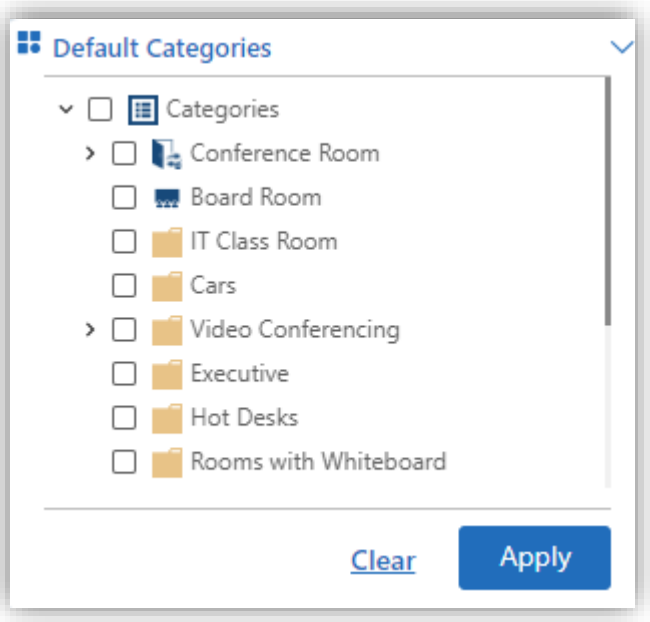


Figure 29. Default Categories

Help

Click on [**Further information**] button to visit our support site.

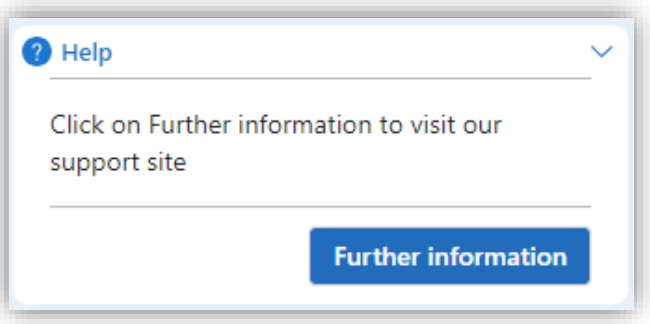


Figure 30. Help

CHAPTER 6.

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 at the same time. 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, allowing conflicts, and setting capacity number (which determines how many attendees (including the organizer) can be invited in the pool), you can book a resource multiple times simultaneously as long as the total attendees invited (including organizer) to the meetings do not exceed the capacity number set for this resource.

Outlook Add-in will block you if you exceed the available capacity at the time you try to book.

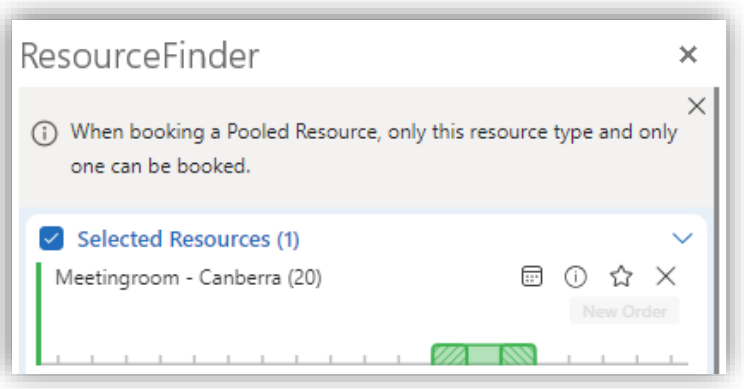


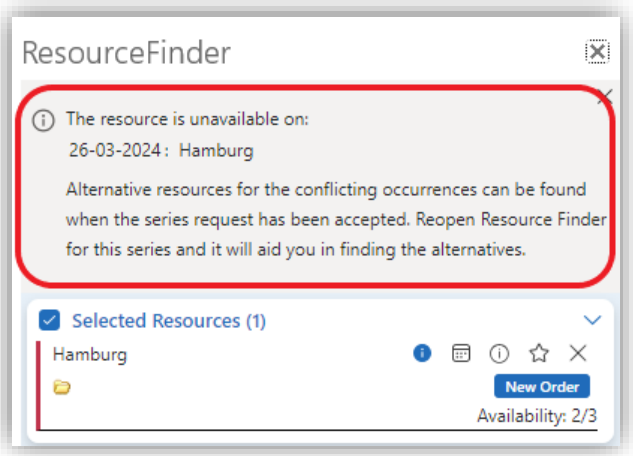
Figure 31. Pooled resource

NOTE:
- If the capacity is violated either when the organizer uses native Outlook to book excessive capacity, the organizer will receive a decline email from Exchange on that resource reservation.
- You are unable to order services for the meetings in the pool.
- You are allowed to invite a person to different meetings in the pool.

CHAPTER 7.

Booking alternative resource for recurring meeting

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

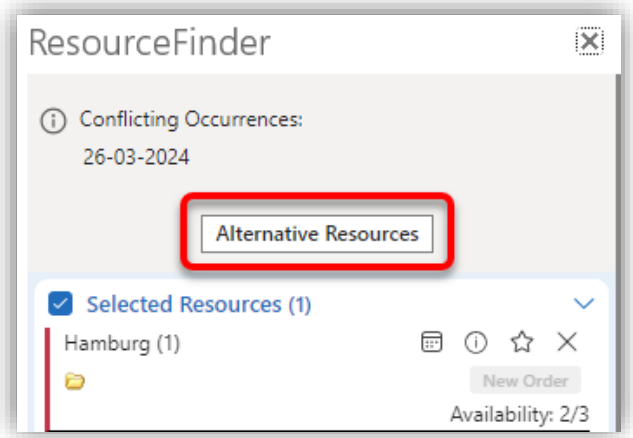


The message warns you about the dates that have conflicts. These conflicts can be replaced by using **Outlook Add-in** after the Series has been approved – meaning after you have sent the meeting invite, you will be sent the acceptance email for your booked resource.

Figure 32. Conflicted resource

To start selecting alternative resources, 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 **Outlook Add-in** again. You will see the [**Alternative Resource**] button:



Notice that it shows conflict dates but there is no resource next to it.
Click the button to open the 'Alternative Resources' section. Here you can select conflicting dates and then click [**Available Resources**] to select different resources for those dates:

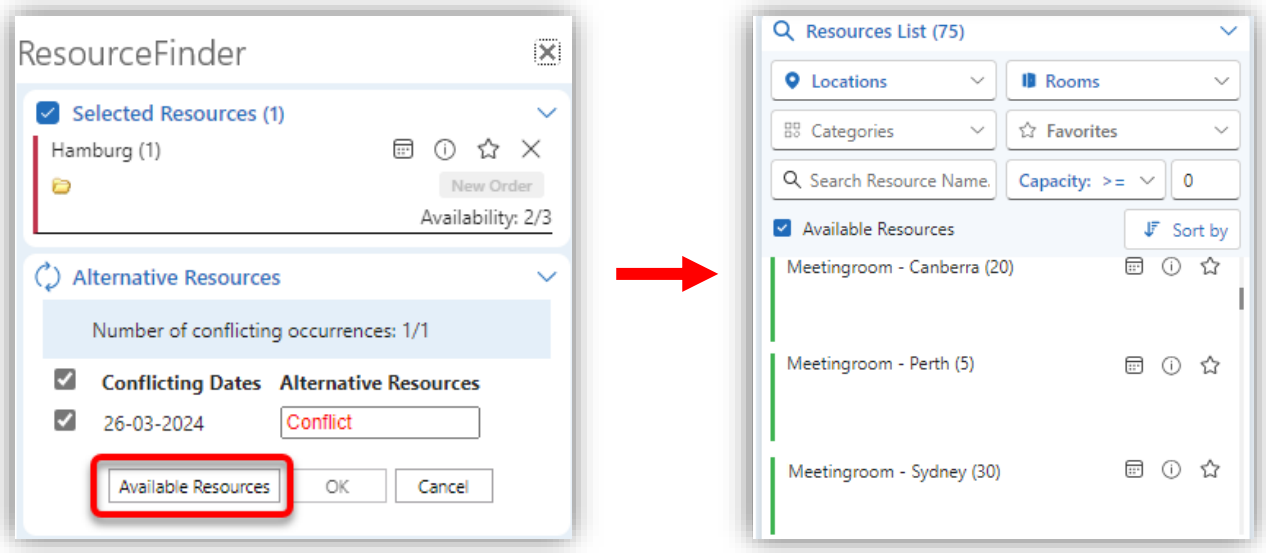
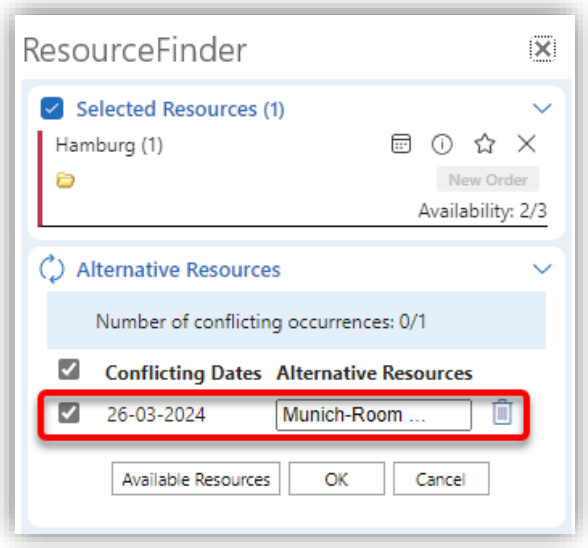


Figure 33. Selecting alternative resource

Once you have selected an alternative resource, you will then see a new message as example below:



You can delete the alternative resource by clicking on the **Delete** button on the right and re-select a different resource ➔ [**OK**].

A warning will appear to confirm the Alternative Resources you have changed for each Conflicting Occurrences:

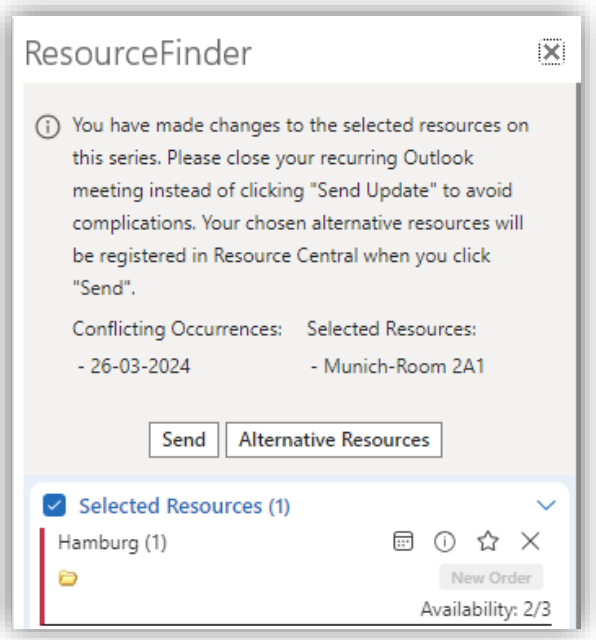


Figure 34. Alternative Resources confirmation

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

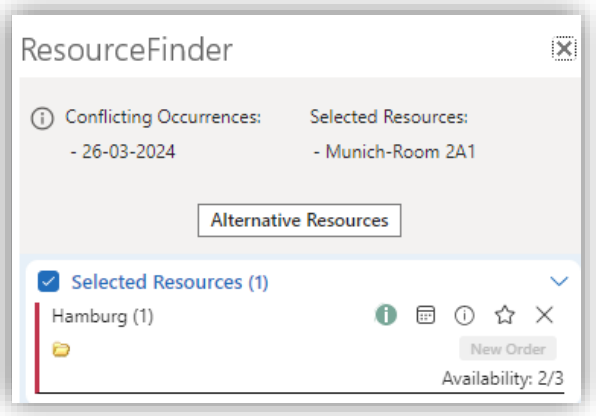


Figure 35. Altering resource successfully

Be aware that once you click [**Send**], conflicting dates that are registered with alternative resources cannot change the resource again. Clicking the [**Alternative Resources**] button only lets you change the resource for conflicting dates that still do not have alternative resource.
Then, you will receive an email for each conflicting Occurrence informing you that the booking of the old resource is now cancelled.

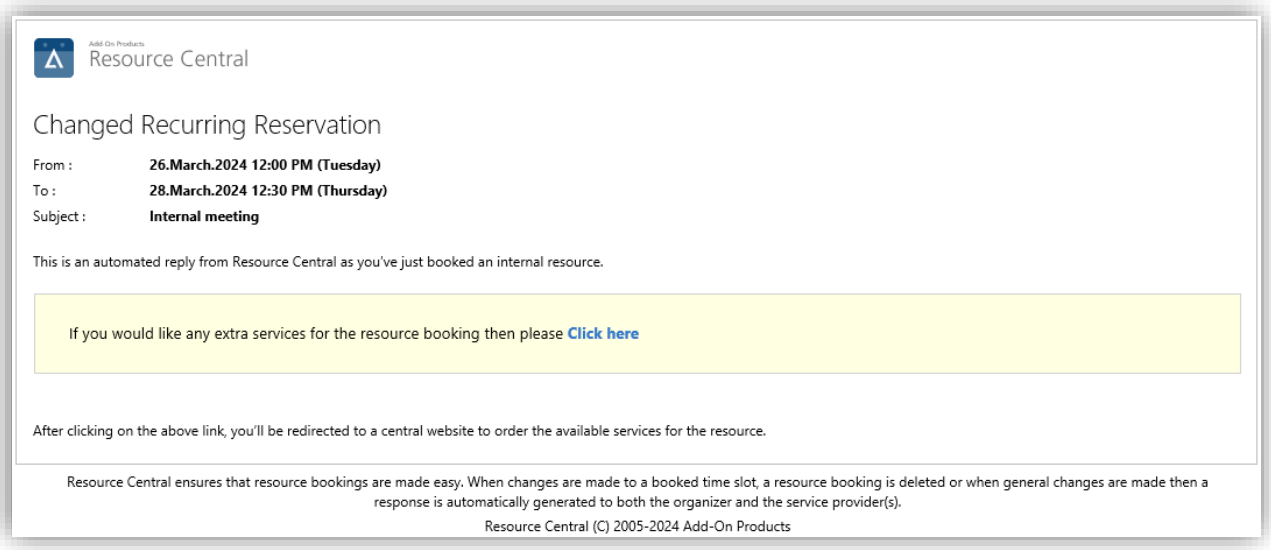


Figure 36. Cancelling conflicted resource email

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

Finally, close your Meeting Series window.
If there is a message asking you what to do with this meeting request, choose '**Don't save changes**' and then click [**OK**].

NOTE: 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.:

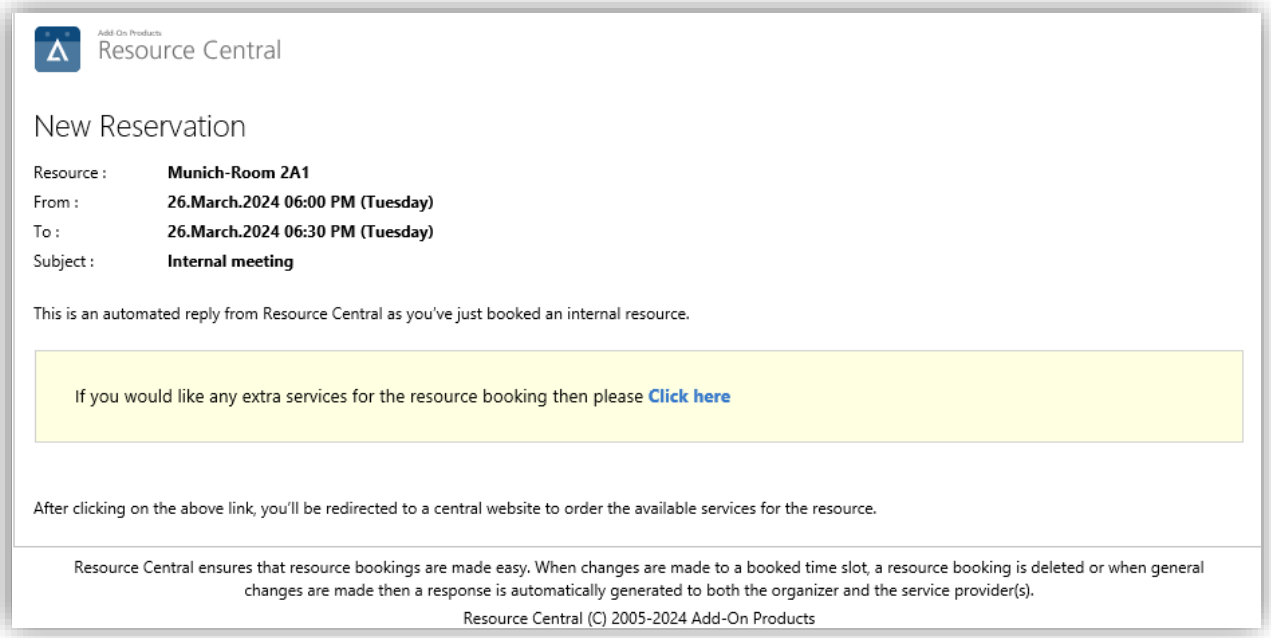


Figure 37. New alternative resources email

CHAPTER 8.

My Meetings

In Outlook®, you have another Icon in your toolbar named **My Meetings**. The function of My Meeting is to help you keep track of all your orders for your future meetings or create new orders.

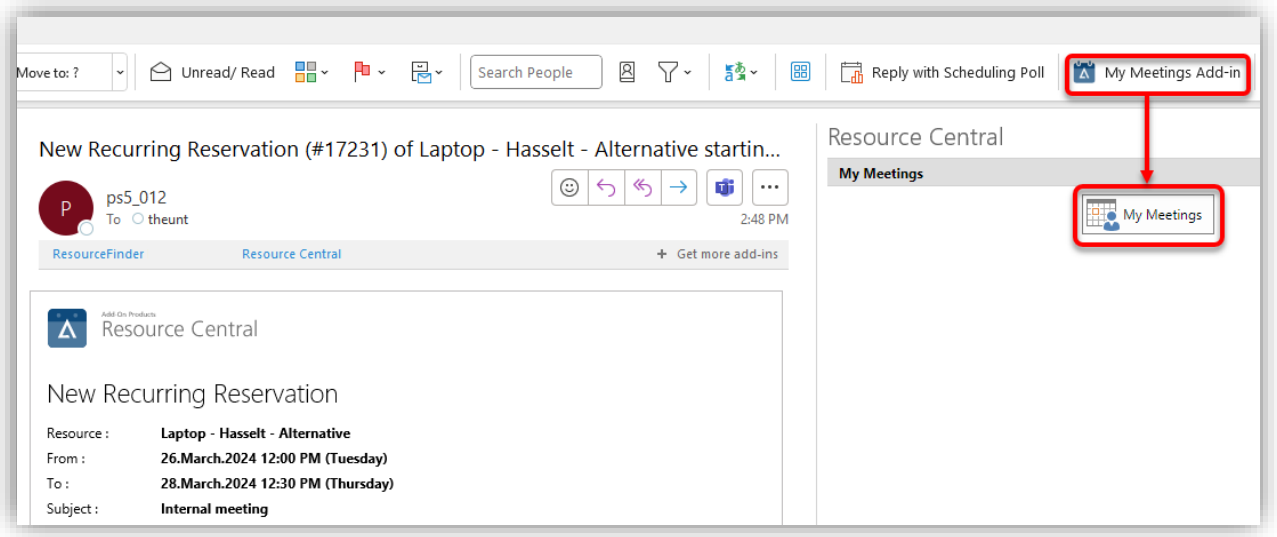


Figure 38. My Meetings – Outlook Desktop

My Meetings is accessible:

1. When you open an email, 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 and New Outlook Desktop, My Meetings is accessible when you open an email, click [**More apps**] button, and select [**My Meetings**] as in the following figure:

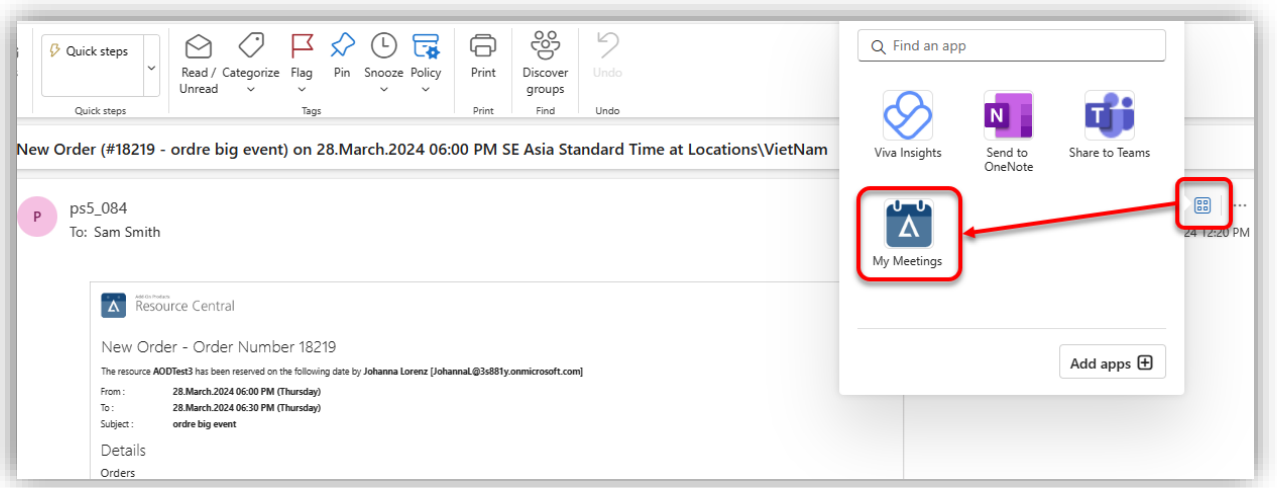


Figure 39. My meetings – Outlook on the web/New Outlook Desktop

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

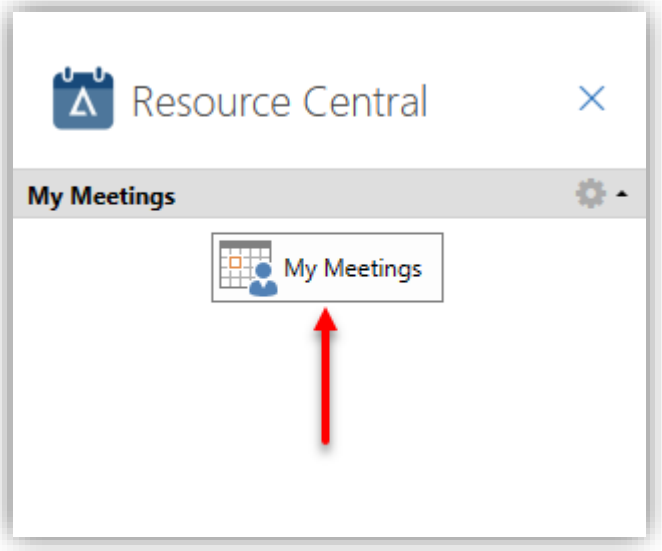


Figure 40. Open My Meetings

My Meetings navigation

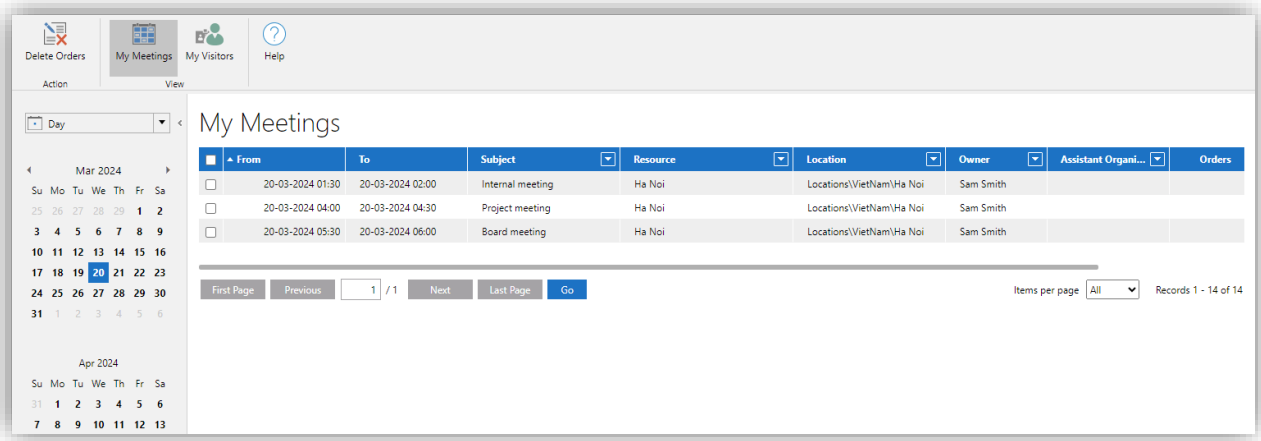


Figure 41. My Meetings Navigation

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 the status of the order you selected.

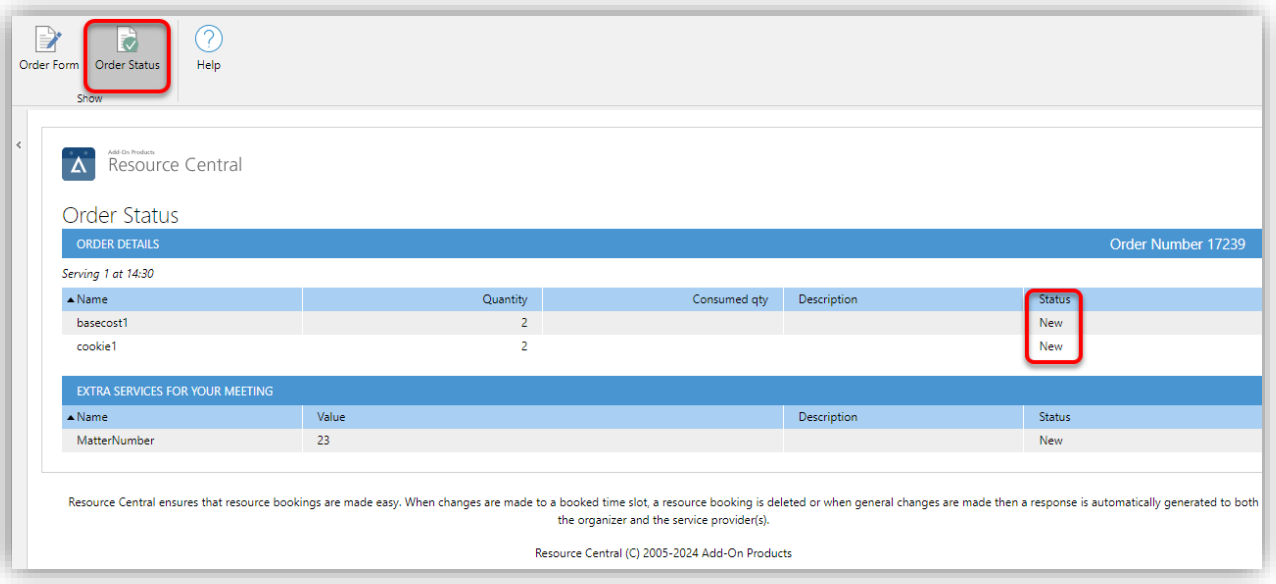


Figure 42. Order status

Delete 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.

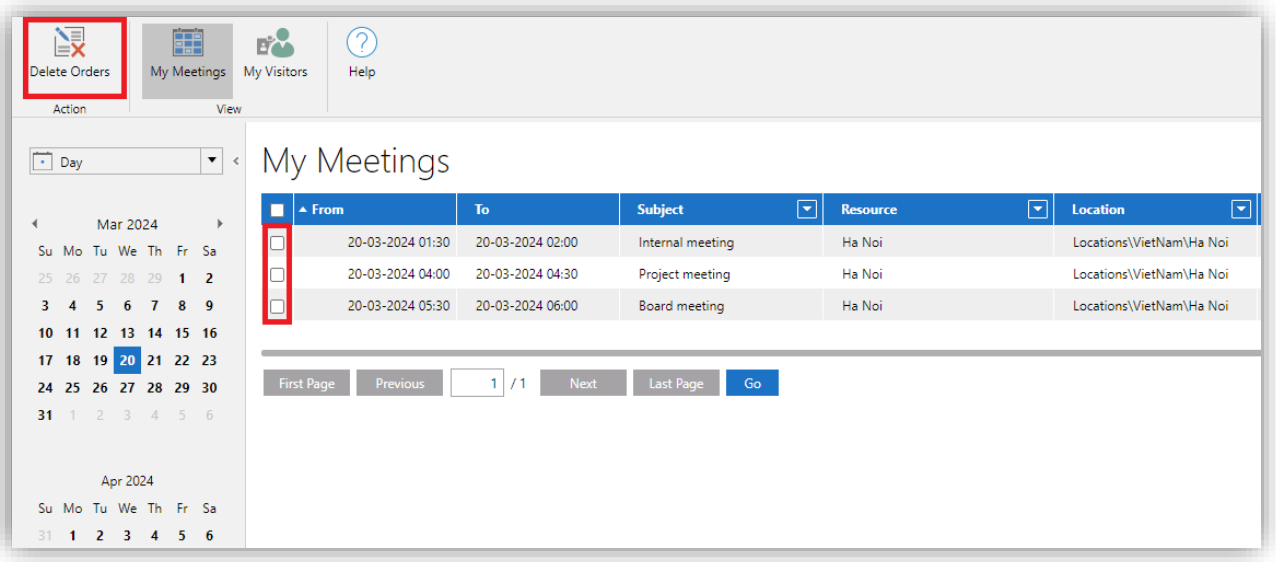


Figure 43. Delete Orders Button

Cancelled Order Email will be sent to the 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.

Manage Visitors

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

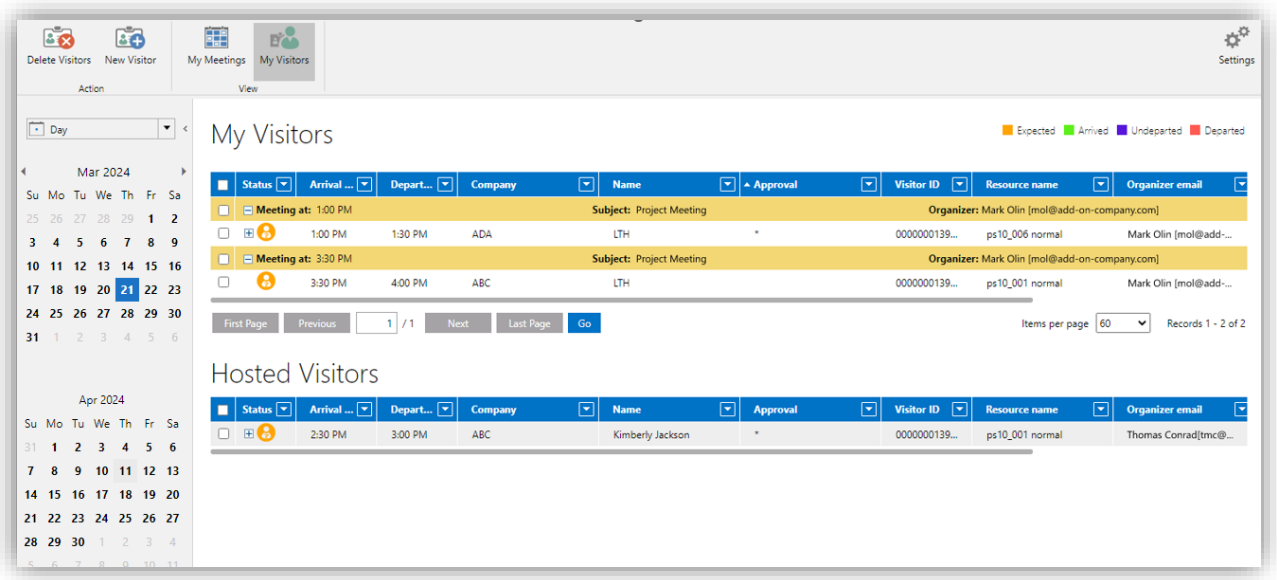


Figure 44. My Meetings – Visitors list

Button	Description
New Visitors	Add a visitor to a meeting or a person/user
Delete Visitors	Delete the selected visitor(s)
My Meetings	Go back to My Meetings list
My Visitors	Show list of visitors invited

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

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

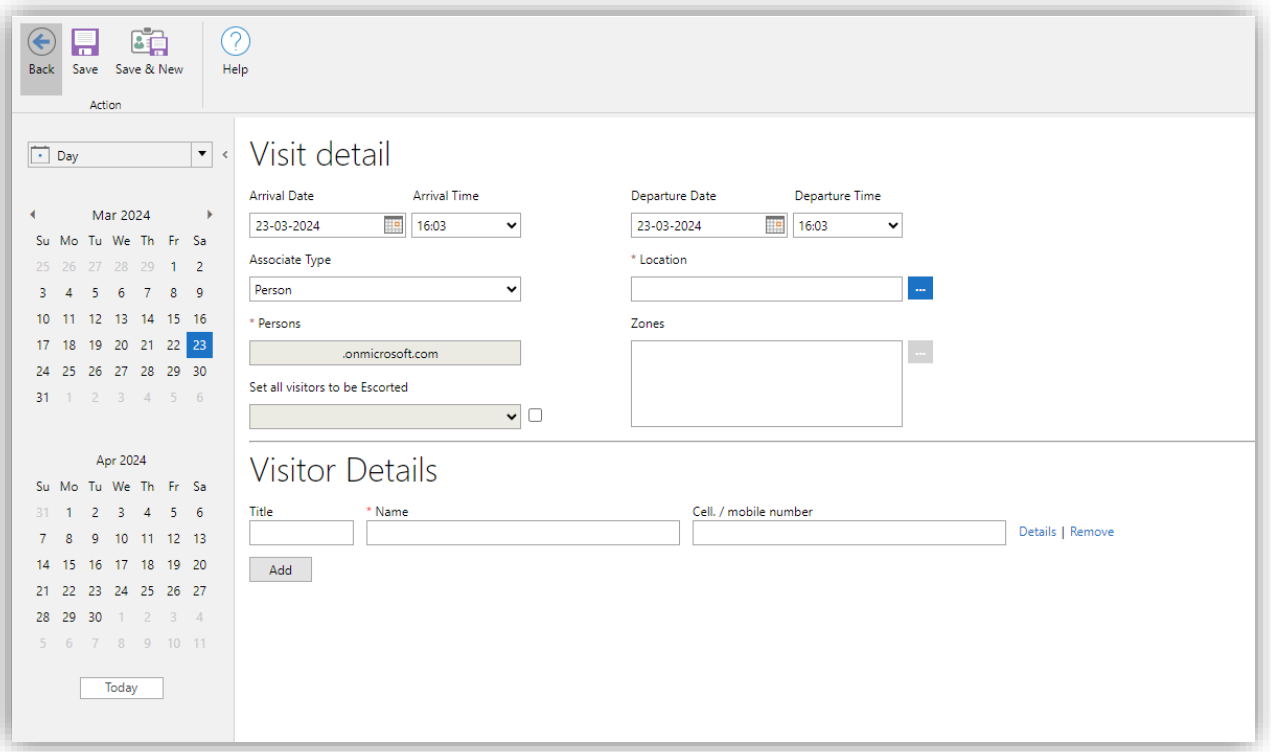


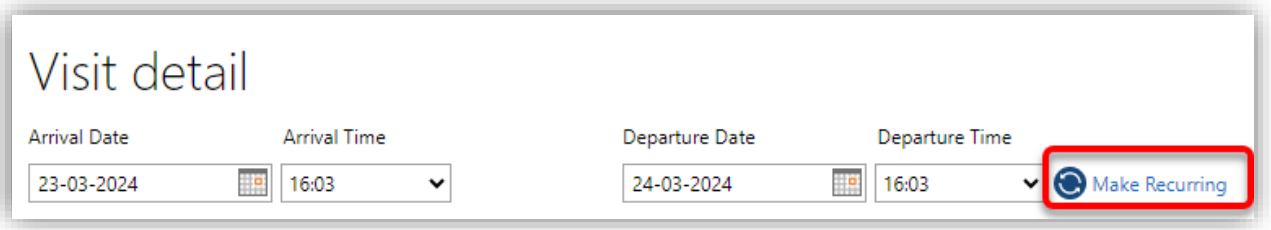
Figure 45. Add a visitor

On 'Visit detail' section, you can set **Arrival and Departure date & time**, **Location** where your visitors will be invited to, and **Zones** where your visitors can go to.

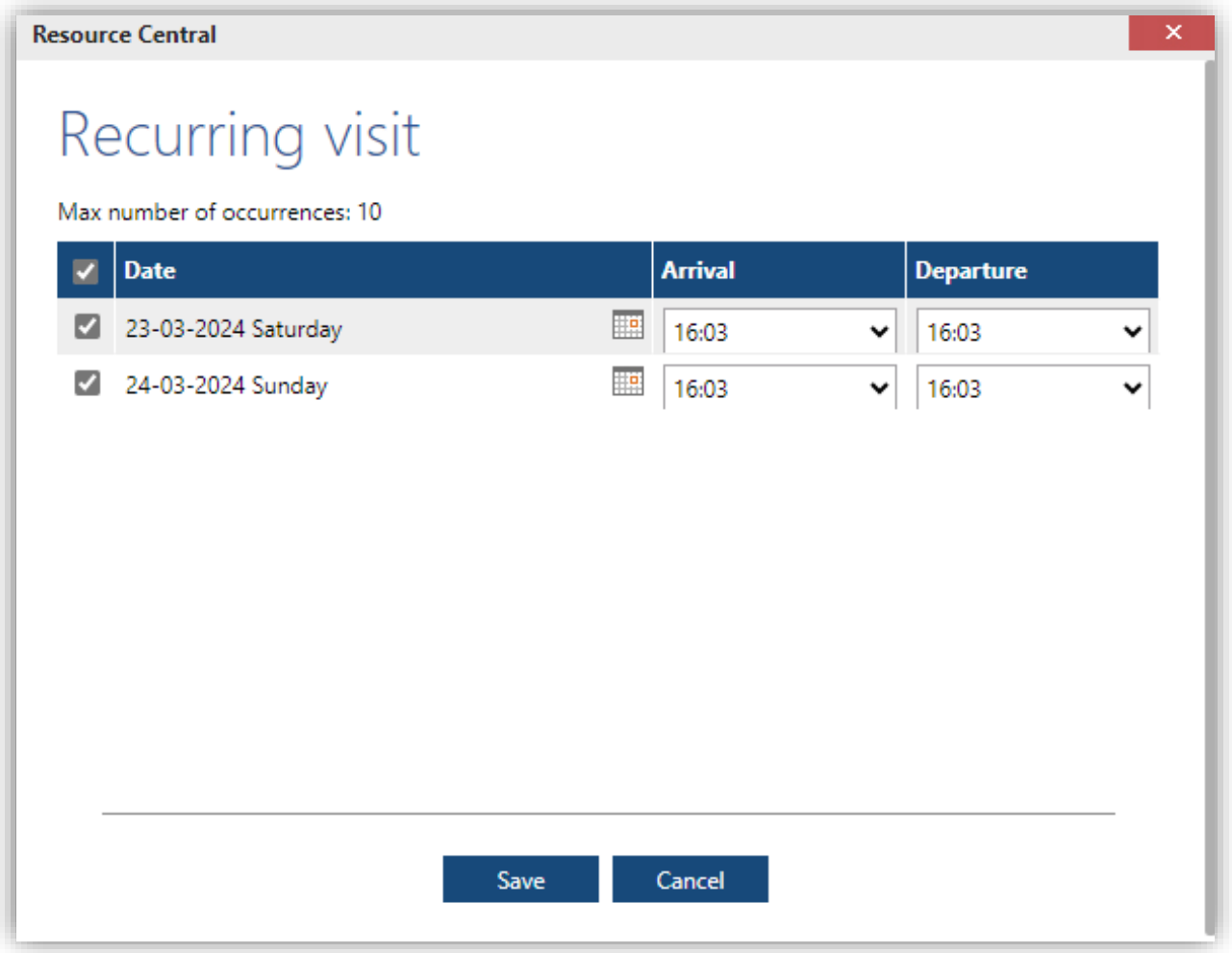
If you select 'Reservation' for **Associate Type** field, then you will not need to fill in the fields mentioned above. Instead, you simply need to select a reservation that you have created.

On 'Visitor Details' section, you can add specific visitors and fill in their information. Once you are done, click [**Save**] to finish.

You can also set recurring visit for your visitor if the Arrival Date and Departure Date are 2 different dates. In this case, a new option [**Make Recurring**] will appear, e.g.:



Clicking [**Make Recurring**] will open a 'Recurring visit' similar as follows where you can select the exact recurring dates:



Here you can select the exact date and time for each occurrence. Note that there may be a maximum number of occurrences which is determined in **Resource Central Admin ➔ Designer ➔ Visitors** (refer to Resource Central Administrator Guide for more details).

After filling in necessary information of your visitor(s), click [**Save**] to finish.