

Resource Scheduler User Guide

Resource Scheduler version 11.0

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Overview

Resource Scheduler is a web-based single source system used to reserve rooms, catering, equipment and furnishings.

General Guidelines

All required fields must be completed for every reservation. Any reservation without these will be auto-deleted by the system.

Logging into Resource Scheduler

This is the link to Resource Scheduler: <https://company.resourcescheduler.net/resourcescheduler>

Clicking on this link will launch your browser and open to the Resource Scheduler Home Page.

Notes:

- *Pop-ups must be allowed in the browser for the Resource Scheduler site.*
- *Please use the links and buttons on pages to move between pages rather than using the browser "back" button.*
- *For best results, set Internet Explorer to check for newer versions of stored pages "every time I visit the webpage".*

Creating Reservations

Using the Reservation Wizard:

Reservation Wizard searches for available rooms based on several filters. When choosing a recurring pattern for a meeting, the results show only those available for every instance of the pattern. This avoids conflicts that would need to be resolved. Reservation Wizard also provides an easy way to reserve more than one room for a meeting.

- 1 Click **Reservation Wizard** in the **Toolbar** or the **Quick Links** drop-down to be guided through a step-by-step process.

HOME RESERVATION WIZARD PLANNER APPROVALS VISITORS REPORTS QUICK LINKS

Company Tree

Company Offices

- CA - San Francisco
- NY - New York City
- 10th Floor

My Favorites

	8 AM	9 AM	10 AM	11 AM
Room 1015				

- Use the wizard to set the criteria for the search.
- The first drop-down sets the location(s). Select one or multiple locations, or select All. Specific locations can be clicked in the list, and the header of the drop-down will reflect the number selected.
- If a single location is selected, one or more groups can be selected in the next column. Specific groups can also be selected.

HOME RESERVATION WIZARD PLANNER APPROVALS VISITORS REPORTS QUICK LINKS

Scope

Sample Location 1

Groups (2)

All Resource Types

Date/Time

04/26/2017

Recurring None Daily Weekly

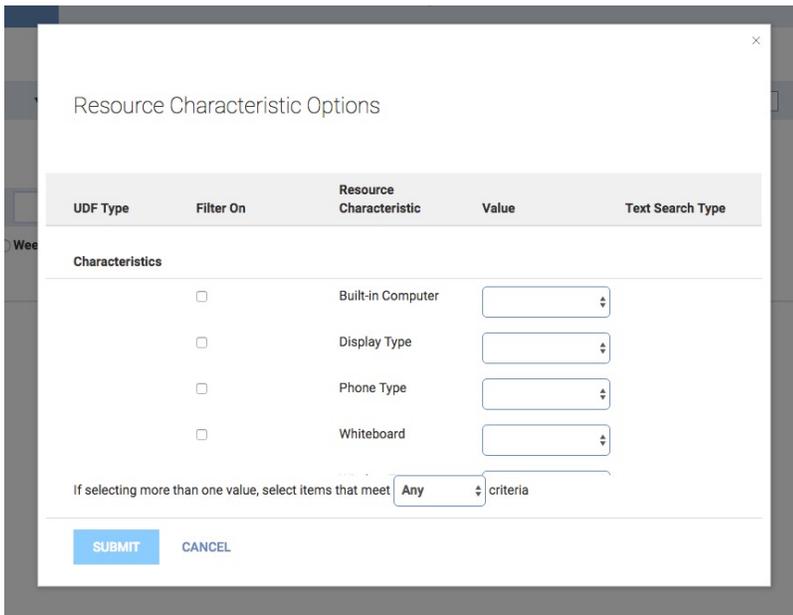
Only Available Resources

- All Groups
- First Floor
- First Floor Meeting Rooms
- First Floor Temporary Offices
- Second Floor
- Second Floor A-V and Computers
- Second Floor Meeting Rooms
- Second Floor Training Rooms

- There may be an option to select the **Timezone for Reservation**.
- Use the **Resource Type** to choose one or more types of spaces for the search. Select All for all types.
- Enter **Capacity** to find a room large enough for the meeting, if appropriate.

Capacity: 0

- If specific amenities are needed, use the **Filter** to select them.



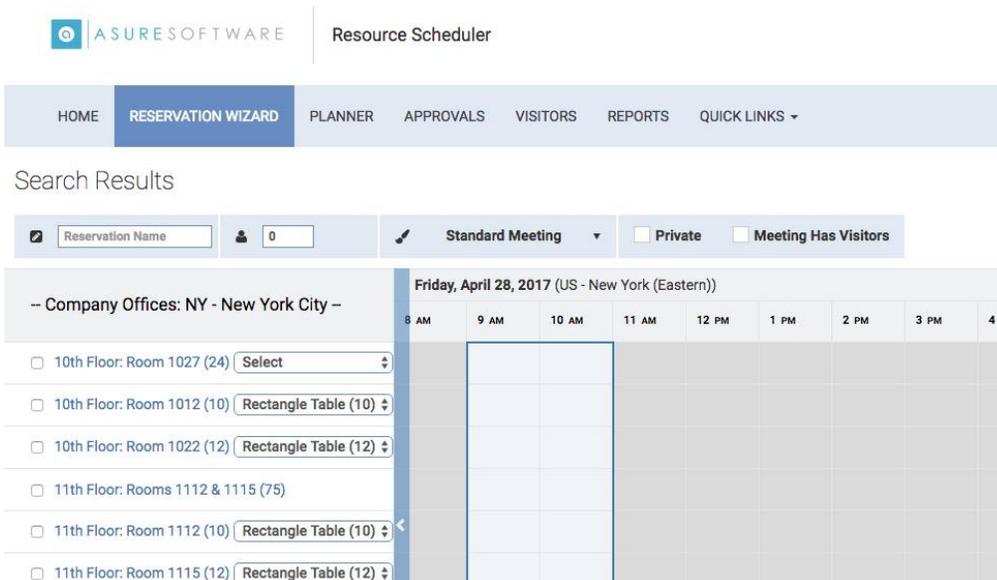
9 Specify the **Date**, **Start** and **End** times.

Date/Time

10 To only show spaces available at that day and time, check the **Only Available Resources** box. If a recurring pattern is chosen, only spaces available for every instance of the series will be shown.

11 Click on **Next** to return the results that match your criteria.

12 Your meeting time will be highlighted in the results grid. Other meetings appear as colored blocks.



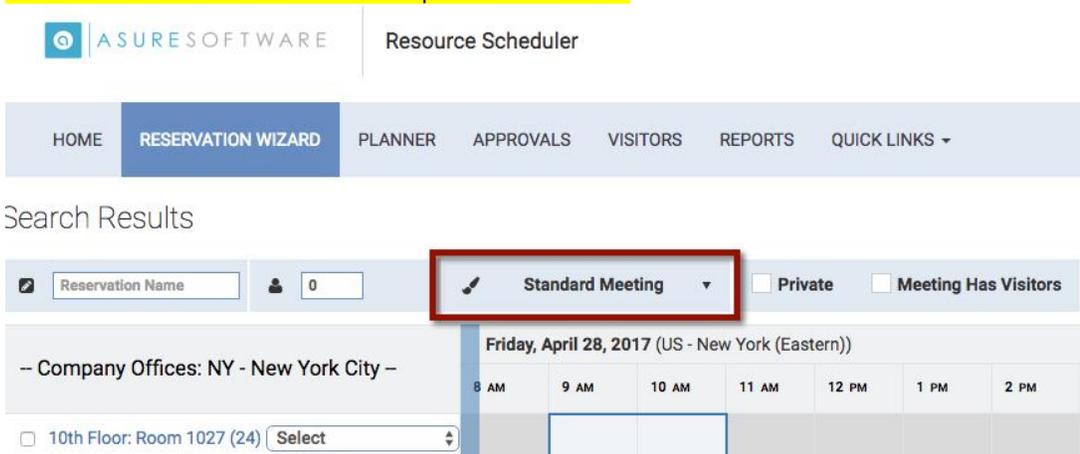
13 To view details about a room or space, click on its name in the list.

Room 1012

Description	Room 1012
Location	NY - New York City:10th Floor
Resource Type	Video Conference Room
Contact Info	
Capacity	10
Reservations require approval	No
Additional Information	
Time Fence	6 Months Rolling (Apply Limit to non-Recurring Schedules) (Location Level)
Options	
Phone Type	Standard
Built-in Computer	Yes
Display Type	Digital Display (TV)
Whiteboard	Yes

[CLOSE](#)

- Numbers in parentheses indicate the max capacity for the room.
- A room with a  requires approval. A response will be provided within 24 hours. Reservations created by Scheduling Administrators are pre-approved.
- View meeting details by *hovering* your cursor over other events.
- Type the **Reservation Name** in the field provided.
- Select the **Status** from the drop-down menu.



The screenshot shows the 'Resource Scheduler' interface. At the top, there is a navigation bar with 'HOME', 'RESERVATION WIZARD' (highlighted), 'PLANNER', 'APPROVALS', 'VISITORS', 'REPORTS', and 'QUICK LINKS'. Below the navigation bar, there is a 'Search Results' section. In the search results, there is a form with a 'Reservation Name' field, a '0' in a box, a 'Standard Meeting' dropdown menu (highlighted with a red box), and checkboxes for 'Private' and 'Meeting Has Visitors'. Below the form, there is a calendar view for 'Friday, April 28, 2017 (US - New York (Eastern))' with columns for 8 AM, 9 AM, 10 AM, 11 AM, 12 PM, 1 PM, and 2 PM. A dropdown menu shows '10th Floor: Room 1027 (24)' with a 'Select' button.

- Check the box for the room(s) you want to reserve, choose a setup style if applicable, and click **Submit** at the bottom of the page.
- Click **Edit** to complete the required fields, add services or include other details. The Reservation Details page will open. Click **Finished** if nothing needs to be added.

Meeting with Catering ID: -1999999311 US - New York (Eastern) CANCEL SAVE MORE

04/28/2017 09:00 AM To 11:00 AM Repeat...

Details Options ! History

Host Nancy Miller # More...

Invite Nancy Miller (1) Attendees

Description

Standard Meeting # Of Attendees 10 Private Flag for Follow-up Meeting Has Visitors

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

NY - New York City - 10th Floor ADD SERVICES

Room 1012 (10) Rectangle Table (10)

21 Fill out all required fields in Red on the Options tab.

Meeting with Catering ID: -1999999311 US - New York (Eastern) CANCEL SAVE MORE

04/28/2017 09:00 AM To 11:00 AM Repeat...

Details Options ! History

Use Video Conferencing?

Long text

Room Usage Policies Please click [here](#) to read the room usage policies and use the drop-down below to confirm that you understand and agree to comply with them.

I have read and agree

22 To assign this meeting to another user as meeting host, use the **Host** section, clicking **More** to add details. See the [Adding More Information to a Reservation](#) section for more information.

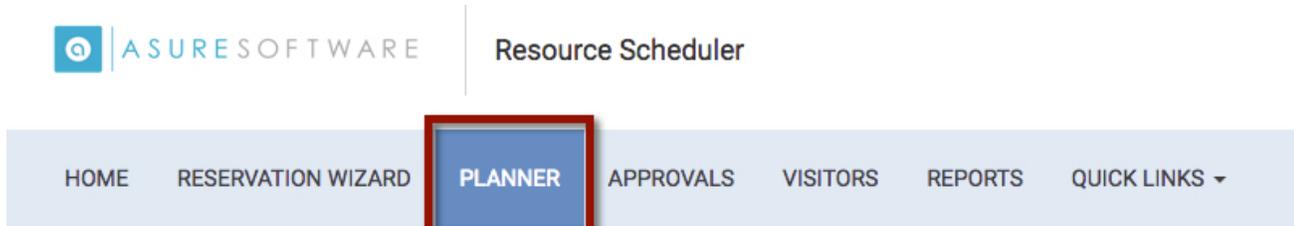
23 Setup and cleanup times can be adjusted by Scheduling Administrators.

24 To add catering or other services, click the **Add Services** button. See the [Requesting Catering and Equipment](#) section for more details.

- 25 To e-mail information regarding this reservation, click **More** at the top right and choose the **Email** options.
- 26 Click the **Submit** button at the bottom of the page when finished.
- 27 Back at the confirmation page, click **Finished** to be returned to Reservation Wizard to continue making reservations.

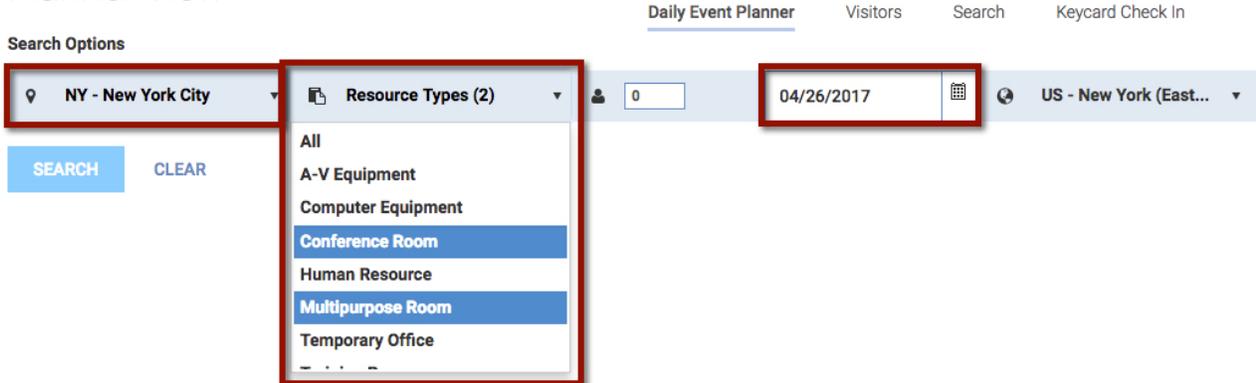
Using Daily Planner View

Daily Planner View provides the ability to view, manage and create reservations across one location for a single day. To view it, click on the **Planner** button in the tool bar.



- 1 Choose the **Scope** for the search. Specific Locations and/or Resource Types can now be selected. Most users prefer not to limit the **Resource Type** or **Capacity** when using **Daily Planner View**. Select the **Date**.

Planner View



- 2 Click the **More Options** link to see additional filters. If desired, choose the **Display Settings** for information to be displayed in the grid. **Title** is the most common option. Most other filters will not apply to your location. Click **Less Options** to collapse the filters again.

Search Options

NY - New York City Resource Types (2) 0 04/26/2017 US - New York (East...
Display Settings Title
Event Status All
Event All
Service Order Placed
SEARCH CLEAR Less Options -

- 3 Click the **Search** Button.
- 4 The search criteria can be collapsed by clicking on the **Hide** link in the upper right hand corner. If the search was for today, a **Red Line** indicates the current time. Existing reservations appear as colored blocks in the grid.

HOME RESERVATION WIZARD **PLANNER** APPROVALS VISITORS REPORTS QUICK LINKS -
Planner View
Daily Event Planner Visitors Search Keycard Check In
Search Options
NY - New York City Resource Types (2) 0 04/26/2017 US - New York (East...
SEARCH CLEAR More Options +
Wednesday, April 26, 2017 (US - New York (Eastern) Time Zone)
12am 1am 2am 3am 4am 5am 6am 7am 8am 9am 10am 11am 12pm 1pm 2pm 3pm 4pm 5pm 6pm 7pm 8pm 9pm 10pm 11pm
-- Company Offices: NY - New York City -- Wednesday, April 26, 2017 (US - New York (Eastern))
10th Floor: Room 1015
10th Floor: Room 1027
10th Floor: Room 1022

5 Symbols may appear by some reservations. They include:

- a. designates a recurring reservation.
- b. indicates a reservation request that has not yet been approved
- c. indicates that the meeting includes an equipment request.

- 2 *Hovering* over an existing reservation displays a pop-up window with links to **Edit**, **Details** and **Delete**. You can only make changes if you created a reservation or are a Scheduling Administrator for that room.
 - a. **Edit** opens a Quick Reserve-style window for quick changes.
 - b. **Details** opens the Reservation Details page for more advanced editing.

c. **Delete** allows you to cancel the reservation.

- 3 Click on an available time in the grid to open a **Quick Reserve** template, which is similar to the Quick Reserve in Schedule View (see the [Using Quick Reserve](#) section for details).

Using Quick Reserve

Use **Quick Reserve** to create a reservation from the **Schedule View**. This method is especially easy when you know what space you want to reserve. Clicking on a group folder in the **Navigation Tree** (on the left side of the screen) will open this view. Clicking on a single room in the Tree will open its **Schedule View**.

The screenshot shows the ASURE SOFTWARE Resource Scheduler interface. At the top, there is a navigation bar with tabs: HOME, RESERVATION WIZARD, PLANNER, APPROVALS, VISITORS, REPORTS, and QUICK LINK. Below the navigation bar is a 'Company Tree' section with a search bar and a list of company offices. The '10th Floor' folder is expanded, showing 'Room 1012', 'Room 1015', 'Room 1022', and 'Room 1027'. The 'Room 1022' folder is highlighted with a red box. To the right of the navigation tree is a 'My Favorites' section with a calendar view for 'Room 1015'. The calendar has columns for 8 AM, 9 AM, 10 AM, 11 AM, and 12 PM. Below the calendar is a 'My Reservations' section with a notification: 'Test e-mail requested for' followed by a blue icon, a yellow icon, and an asterisk, with the date and time 'Apr 27, 2017 1:00 PM - 2:00 PM'.

To change dates for the **Schedule View**, tabs at the top provide **Day, Week, Month and Timeline** views which can be scrolled by using the arrows. Click the date(s) to open a date-picker calendar.



Company Tree ▾

- Company Offices
 - CA - San Francisco
 - NY - New York City
 - 10th Floor
 - Room 1012
 - Room 1015
 - Room 1022
 - Room 1027
 - 11th Floor
 - SA - Johannesburg
 - UK - London

10th Floor

US - New York (Eastern) All Color ▾

Today ◀ ▶ 📅 Sunday, April 23, 2017 - Saturday, April 29, 2017

Day Week Month Timeline Timeline Week

	Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29
Room 1012 (10)						Meeting with Catering (9:00am - 11:00am)	
Room 1015 (12)				* Test e-mail requested for (1:00pm - 2:00pm)		Meeting (9:00am - 11:00am)	
Room 1022 (12)							
Room 1027 (24)							

- 1 When viewing the schedule, click on an open block of time. This will open the **Quick Reserve** window.
- 2 Enter the **Reservation Title**, **# Of Attendees**, **Setup** (if available), **Date**, **Start** and **End** times for the reservation. If the reservation is for another Resource Scheduler user, begin typing their name in the **Requested For** field. After 3 or 4 characters, a drop-down list of options will appear. Select the correct user. Since the system already recognizes you as the creator of the reservation, it will not display your user profile in the choices.

Today Friday, April 29, 2017 Friday, May 6, 2017 Next Week

100
100

100
100

Quick Reserve ✕

Reservation Title	<input type="text"/>
# Of Attendees	<input type="text" value="0"/>
Color	<input type="text" value="Standard Meeting"/>
Resource	<input type="text" value="Room 1015"/>
Meeting Has Visitors	<input type="checkbox"/>
Setup Style	<input type="text" value="Rectangle Table(12)"/>
Start Date/Time	<input type="text" value="May 1, 2017"/> <input type="text" value="Select"/> <input type="text" value="00"/>
End Time	<input type="text" value="Select"/> <input type="text" value="00"/>
Requested For	<input type="text"/>

[MORE...](#)

- 3 Click **Submit** to complete the reservation. Click **More** to open the details page to add any other information such as catering or AV requests. On the **Options** tab, fields in **Red** must be completed.

The screenshot shows a reservation details page for 'Meeting 2'. The 'Options' tab is selected and highlighted with a red box. A warning dialog box is overlaid on the page, stating: 'nmillerlab.resourcescheduler.net says: Please complete all required option fields (shown in red) or click the Delete button to clear this schedule!'. The dialog has an 'OK' button. Below the dialog, the 'Host' field is 'Nancy Miller', and the 'Invite' field is 'Nancy Miller'. The 'Description' field is empty. The 'Standard Meeting' dropdown is set to 'Standard Meeting', and the '# Of Attendees' is '10'. There are checkboxes for 'Private', 'Flag for Follow-up', and 'Meeting Has Visitors'. The 'Setup Time' and 'Cleanup Time' are both set to '0'. At the bottom, there is a section for 'ADD RESOURCES+' and 'REMOVE ALL', showing 'Room 1015 (12)' and 'Rectangle Table (12)'.

- 4 Add additional details as needed. See the [Using the Reservation Wizard](#) and [Adding More Information to a Reservation](#) sections for more information.
- 5 When finished entering details, click **Save**, which will return you to the Calendar View.

Editing a Reservation

To review information about a reservation or update the reservation, click on the **Reservation Title** in the **Schedule View**, **My Reservations**, **My Flagged Reservations** or in any search results.

To modify a reservation:

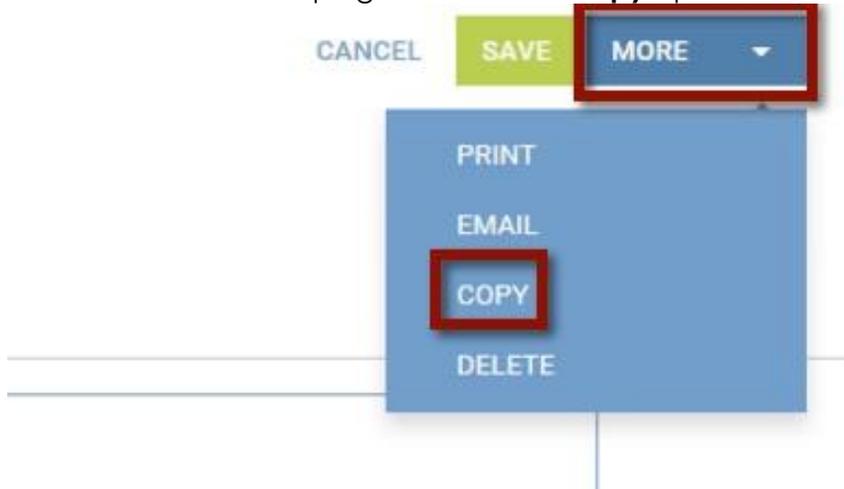
NOTE: Only reservations created through the web client should be edited in the web client. Outlook reservations should be managed in the Outlook calendar where they were created.

- 1 Click on the link to the reservation you are interested in.
- 2 In the Reservation Details page, make necessary changes to the reservation. The meeting host and any attendees will be notified of the change.
- 3 If a date or time change results in a conflict, a warning prompt will appear. Read the prompt and resolve the conflict. See the [Managing Conflicts](#) section for details.
- 4 Click **Save**.

To copy a reservation:

NOTE: Recurring reservations and reservations that were created through the Outlook interface cannot be copied.

- 1 Click on the link to the reservation you are interested in. In the Reservation Details page, click the **More** button at the top right. Select the **Copy** option.



- 2 Depending on the reservation, you will be given options of other details to copy, including Attendees, Services, etc.
- 3 Click **Copy** at the bottom left.

- Copy Attendees & Visitors
- Copy Requested For/By
- Copy Option Information

COPY CANCEL

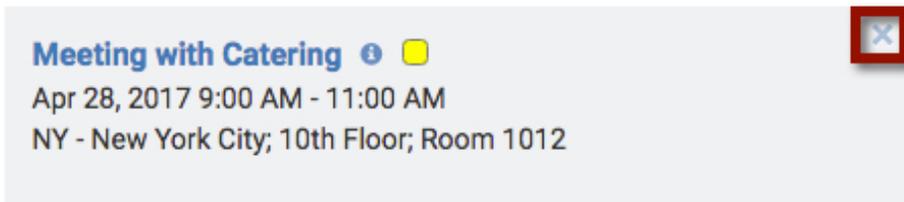
- 4 Resolve any conflicts that occur. See the [Managing Conflicts](#) section for details.

To delete a reservation:

There are two ways of cancelling a reservation:

From My Reservations:

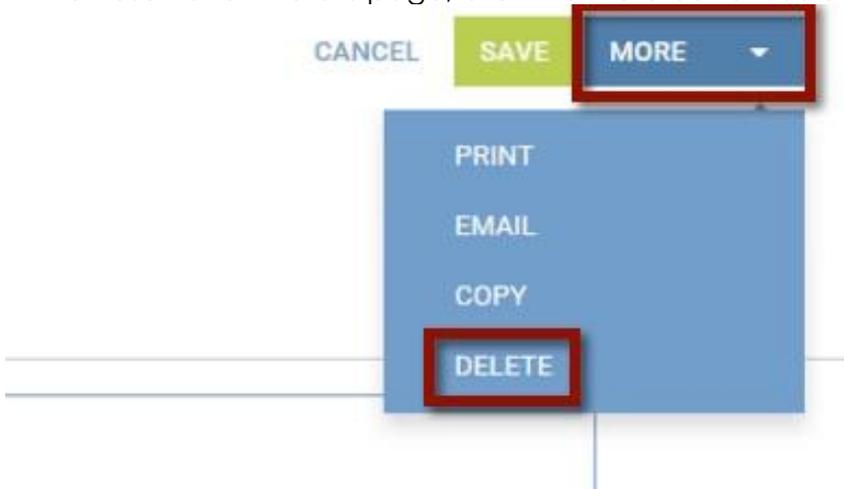
- 1 CHANGED: Click on the **X** at the top right of the box for the reservation you wish to cancel.



- 2 Click **OK** to confirm.

From within the Reservation Details page:

- 1 Click on the link to the reservation you are interested in cancelling.
- 2 In the Reservation Details page, click the **More** button. Select the **Delete** option.



- 3 Click **OK** to confirm.

Making a Reservation Recurring

In the Reservation Details page, select the **Repeat** checkbox and set the recurrence pattern.



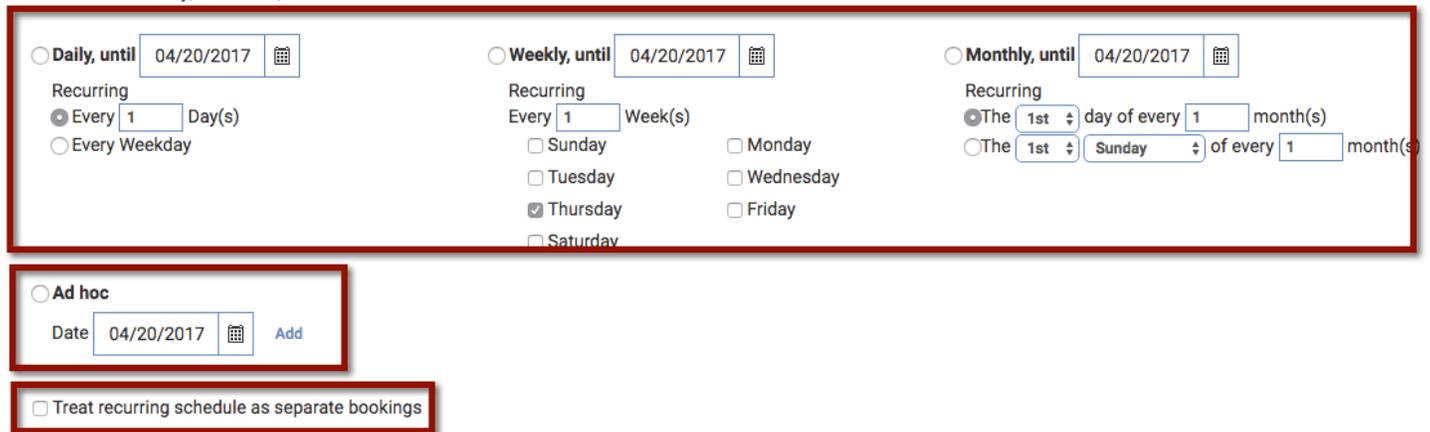
Meeting 1 ID: -1996990102 US - New Jersey (Eastern)

01/25/2017 10:00 AM To 01:00 PM Repeat...

Use the **Ad Hoc** feature to add days which do not fit one of the standard patterns. To edit an existing series, click the **Options** link next to the **Repeat** checkbox. *Resolve any conflicts that occur – no room is reserved for those dates.*

Recurring

Test e-mail requested for | Apr 20, 2017 1:00 PM - Apr 20, 2017 2:00 PM | US - New York (Eastern)
NY - New York City, 10th Floor, Room 1015



Daily, until 04/20/2017

Recurring

Every 1 Day(s)

Every Weekday

Weekly, until 04/20/2017

Recurring

Every 1 Week(s)

Sunday Monday

Tuesday Wednesday

Thursday Friday

Saturday

Monthly, until 04/20/2017

Recurring

The 1st day of every 1 month(s)

The 1st Sunday of every 1 month(s)

Ad hoc

Date 04/20/2017 Add

Treat recurring schedule as separate bookings

SUBMIT

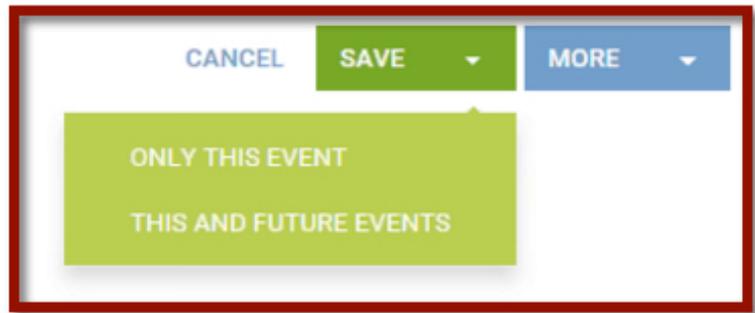
RETURN

NOTE: It is recommended to *not* use the checkbox for “treat as separate bookings”. This will create each instance as a separate reservation, and will require each to be edited separately rather than as a series.

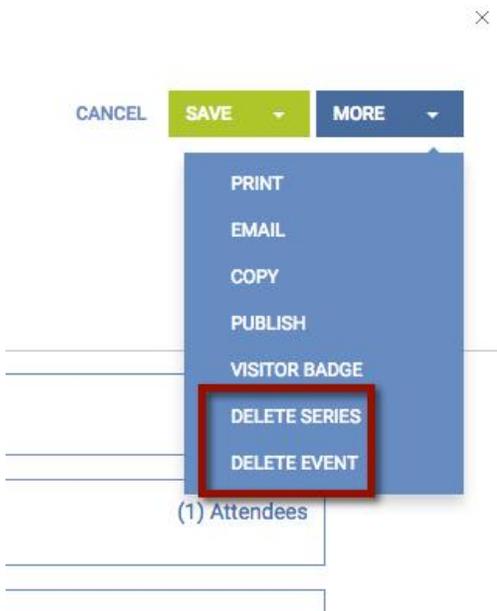
When managing recurring reservations, there will be an option to make a change to a single instance or that instance and all future.

Jersey (Eastern)

Repeat...



The same applies to canceling reservations. There will be an option to delete the single event or the rest of the series.



Managing Conflicts:

- 1 If a room is unavailable for one of the days in your recurring pattern, you will be prompted to resolve the conflict.



2 Reservations with a conflict are marked in red.

Recurring

Recurring with Conflict | Jan 24, 2017 9:00 AM - Jan 24, 2017 4:00 PM | US - New Jersey (Eastern)
BRN001; BRN Conf Rooms; 1230

Recurring Update Completed
There are conflicts in this series.

Ad hoc Date ADD

Extend End Date EXTEND

- ✓ Tuesday, January 24, 2017 (0 Orders)
 - ✗ Wednesday, January 25, 2017 (View Calendar) (0 Orders) 9:00 AM - 4:00 PM Location: BRN001; BRN Conf Rooms; 1230
 - ✓ Thursday, January 26, 2017 (0 Orders)
 - ✓ Friday, January 27, 2017 (0 Orders)
-
- ✓ Monday, January 30, 2017 (0 Orders)
 - ✓ Tuesday, January 31, 2017 (0 Orders)

3 Select the instance which is unavailable, and click on the meeting date.

4 From the Reservation Details page, click on the **Add Resources** button. For recurring reservations, change only one instance at a time.

Confirmed # Of Attendees Private Flag for Follow-up

Setup Time Cleanup Time

ADD RESOURCES + REMOVE ALL

BRN001 - BRN Conf Rooms

1230 (30) !

5 Choose the group of rooms to search and click **Show**. A list of available rooms is shown. Select

an alternate room for this instance of your recurring meeting, and click **Submit**.

- 6 Click the **X** for the room highlighted in red to remove the conflict.

The screenshot shows a meeting reservation form. At the top, there is a dropdown menu set to 'Confirmed', a text input for '# Of Attendees' with the value '29', and two checkboxes for 'Private' and 'Flag for Follow-up'. Below these are two dropdown menus for 'Setup Time' and 'Cleanup Time', both set to '0'. There are two buttons: 'ADD RESOURCES +' and 'REMOVE ALL'. The main area is titled 'BRN001 - BRN Conf Rooms' and has an 'ADD CATERING & EQUIPMENT' button. It lists two room options: '1023 (10)' with a 'Board Table (8)' dropdown, and '1230 (30) !' with a 'Board Table (30)' dropdown. A red box highlights the 'X' icon next to the '1230 (30) !' option.

- 7 Click **Save** to save your change. Choose **Only This Event**.

The screenshot shows a dialog box with three buttons at the top: 'CANCEL', 'SAVE', and 'MORE'. Below these is a green button with 'ONLY THIS EVENT' and a red box around it, and another green button with 'THIS AND FUTURE EVENTS'.

Requesting Catering and Equipment

Catering, A/V and IT equipment can be requested alone or along with a room reservation. If this is an independent request (with no associated room reservation), click the **Catering & Equipment** link in the **Quick Links** in the tool bar. To be included with a room reservation, click the **Catering & Equipment** button in the Reservation Details page.

The screenshot shows a meeting reservation form. At the top, there is a dropdown menu set to 'Standard Meeting', a text input for '# Of Attendees' with the value '10', and two checkboxes for 'Private' and 'Flag for Follow-up'. Below these are two dropdown menus for 'Setup Time' and 'Cleanup Time', both set to '0'. There are two buttons: 'ADD RESOURCES +' and 'REMOVE ALL'. The main area is titled 'NY - New York City - 10th Floor' and has an 'ADD SERVICES' button highlighted with a red box. It lists one room option: 'Room 1012 (10)' with a 'Rectangle Table (10)' dropdown.

- 1 Select the **Add Service** button for the needed service. The options will vary by location. If multiple

rooms are reserved, confirm that the correct location is selected.

Progress bar: Select Service (active), Select Item, Confirm Order

Location: NY - New York City

Service Type	Service Provider	Services	Available Times	Action
AV Requests	New York AV Services	NYC Videoconference and AV List	7:00 AM - 10:30 PM	ADD SERVICE +
Catering	New York Catering	NYC Catering Menu	7:30 AM - 10:00 PM	ADD SERVICE +
Office Services Requests	New York Office Services	NYC Office Services List	6:00 AM - 11:30 PM	ADD SERVICE +

- The meeting title, date, times and location are automatically filled out if the request is part of a room reservation. The times can be adjusted if they should be different than the reservation (common for all-day meetings with catering needs). If multiple rooms have been reserved, confirm that the correct room is reflected in the **Delivery Location** field. For independent requests, fill out the fields appropriately (including building, room, dates and times - see the Independent Service Orders document for details).

Progress bar: Select Service, Select Item (active), Confirm Order

New York Catering - NYC Catering Menu

Order Description: Meeting with Catering

This order will be: Delivered - Room 1012

Delivery Location: Room 1012

Delivery or Start Date & Time: 04/28/2017 09:00 AM

End Date & Time: 04/28/2017 11:00 AM

Beverages	Price	Quantity
Assorted Juices	\$ 1.50 / Each	0
Assorted Sodas	\$ 1.50 / Each	0
Coffee Break Regular and decaf...	\$ 2.50 / Each	0
Hot Tea	\$ 2.00 / Each	0

Breakfasts	Price	Quantity
Bagel and Cream Cheese	\$ 4.00 / Each	0
Continental Breakfast Minimum order 6.	\$ 12.00 / Each	0
Danishes	\$ 2.50 / Each	0

Dinners	Price	Quantity
Special Request Please enter...	Market	0

- Click on an **Item's Title** to learn more about an item. Type the number needed for each desired item in the field next to its name.

Coffee Break

Regular and decaf coffee urns, cream, sugar and supplies. Minimum order 10.

\$ 2.50

[CLOSE](#)

- 4 Some items come with options. Click the link below the item to make your choices.

Coffee Break Regular and decaf...	\$ 2.50 / Each	<input type="text" value="0"/>
Hot Tea	\$ 2.00 / Each	<input type="text" value="0"/>
Lunches		
Bag Lunch Sandwich, bag of...	\$ 12.00 / Each	<input type="text" value="0"/>
✎ Comes with your choice of Bagged Lunch Sandwich Choices		

- 5 Click **Next**.
- 6 In the Confirmation Page, type general information about the order in the **Notes** field in the top section.

Select Service Select Item Confirm Order

CANCEL UPDATE FINISHED BACK

New York Catering NYC Catering Menu View Confirmation

Order Description  Meeting with Catering

This order will be Delivered

Delivery Location Room 1012

Delivery or Start Date & Time 04/28/2017  09:00 AM 

End Date & Time 04/28/2017  11:00 AM 

Notes

Order Information	Billing Information	<input type="checkbox"/> Use Order Info FIND
Ordered Date 4/26/2017	Contact Nancy Miller	
Contact Nancy Miller	EEmail nmiller@asuresoftware.com	
EEmail nmiller@asuresoftware.com	Phone <input type="text"/>	
Department Professional Services	Department Professional Services	
Account Code 55-5555	Account Code 55-5555	

- 7 Fill out the **Billing Information**. Check the **Use Order** Info box if this should be billed to the person in the **Order** Information section. If the person is a Resource Scheduler user, their information can be located by using the **Find** button. Billing information can also be typed into the fields. Fields in red are required.

Order Information	Billing Information	<input type="checkbox"/> Use Order Info FIND
Ordered Date 4/26/2017	Contact Nancy Miller	
Contact Nancy Miller	EEmail nmiller@asuresoftware.com	
EEmail nmiller@asuresoftware.com	Phone <input type="text"/>	
Department Professional Services	Department Professional Services	
Account Code 55-5555	Account Code 55-5555	

- 8 Enter information for a specific item by clicking on the **Pencil** icon next to the item.

Order Management

Status New Order Phase **Not Submitted**

Qty	Description	Item Options	Item Notes	Price Each	Total
NYC Catering Menu					EDIT
10	Assorted Sodas	- None -	Caffeine-free 	\$1.50	\$15.00
10	Coffee Break	- None -	- None - 	\$2.50	\$25.00
10	Bag Lunch	Bagged Lunch Sandwich Choices Turkey and Cheddar, Vegetarian	- None - 	\$12.00	\$120.00

Order Subtotal \$160.00
Sales Tax \$12.80
ORDER TOTAL \$172.80

- 9 Some administrators will have the ability to adjust prices if necessary.
- 10 Click **Finished** when done. Check the **View Confirmation** checkbox first if a printed confirmation is needed.

Select Service
Select Item
Confirm Order

CANCEL
UPDATE
FINISHED
BACK

Branchburg Catering Branchburg Catering

Order Description  Meeting 1

This order will be Delivered Picked Up

View Confirmation

- 11 The order now appears in the Reservation Details page. Click the **Edit** button to make changes to this request. To create further requests, click the **Add Catering & Equipment** button again.

Standard Meeting # Of Attendees Private Flag for Follow-up Meeting Has Visits

Setup Time Cleanup Time

ADD RESOURCES + REMOVE ALL

NY - New York City - 10th Floor **ADD SERVICES**

Room 1012 (10) ×

Rectangle Table (10)

New York Catering: NYC Catering Menu - Meeting with Catering
Delivered 9:00 AM - Pending **EDIT**

Adding More Information to a Reservation

Flagging a Reservation for Follow Up

Reservations can be flagged for tracking purposes if there will be additional changes to the information. In the Reservation Details page, check the box labeled **Flag for Follow-up**. Flagged reservations can be listed by clicking the **More** link under **My Reservations**.

The screenshot shows the 'Reservation Details' page with three tabs: 'Details', 'Options', and 'History'. The 'Host' section shows 'Nancy Miller' with a 'More...' link. The 'Invite' section shows 'Nancy Miller'. The 'Description' section is empty. Below the description are several controls: a dropdown menu set to 'Standard Meeting', a '# Of Attendees' field with '10', a 'Private' checkbox, a 'Flag for Follow-up' checkbox (highlighted with a red box), and a 'Meeting' label. At the bottom, there are 'Setup Time' and 'Cleanup Time' dropdowns both set to '0', and two buttons: 'ADD RESOURCES +' and 'REMOVE ALL'.

On Behalf Of:

If you are creating this reservation on behalf of someone else, click the **More** link in the **Host** section of the Reservation Details page.

Details Options History

Host Nancy Miller [More...](#)

Invite Nancy Miller

Description

Standard Meeting # Of Attendees 10 Private Flag for Follow-up Meeting

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

Enter or select the meeting host, and if needed a third party who is requesting the meeting. If the host is a Resource Scheduler user, you can search for their information with one of the links. They will receive email confirmations, reminders and notice of any changes if you keep the boxes checked.

Request

Meeting with Catering | Apr 28, 2017 9:00 AM - Apr 28, 2017 11:00 AM | US - New York (Eastern)
 NY - New York City, 10th Floor, Room 1012

[User List](#)
[Address Books](#)

Requested For

Name

Email

Phone

Account Code:

Send Email Notices

Requested By

Name

Email

Phone

Send Email Notices

SUBMIT RETURN

Adding Resources

Add additional rooms by clicking the **Add Resources** button. Click **Show**. Only available resources

will be shown.

Details Options History

Host Nancy Miller # More...

Invite Nancy Miller

Description

Standard Meeting # Of Attendees 10 Private Flag for Follow-up Meeting

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

NY - New York City - 10th Floor ADD SERVICES

Room 1012 (10) X

Rectangle Table (10)

New York Catering: NYC Catering Menu - Meeting with Catering Delivered 9:00 AM - Pending EDIT

Other Features

Search Reservations

The Search Reservations link under the Quick Links in the **Tool Bar** allows you to search for reservations. Options include:

- Narrow results by setting the **Scope**, **Resource Type** and **Capacity**.
- Search across easy dates ranges in the future or past, or specify a range of dates.
- Use the **Resource Types** button to be more selective about locations and rooms in the search.
- The **Text Search** is a required field. Type part of the reservation name in the field, or a percentage sign (%) for a wildcard search.
- If you check the box for **Search Deleted Reservations**, the search will include cancelled meetings or events.
- If looking for a specific reservation created or assigned to a Resource Scheduler user, click the gray box next to the **User Contact** field and locate the correct user.

Display Resource Availability

The Display Resource Availability link under the Quick Links in the **Tool Bar** allows you to search room

with specific criteria. Options include:

- Limit the search by **Scope**, single **Resource Type** and **Date** and **Time** ranges.
- By clicking on the **Advanced** link, you can also filter by:
 - Different **Resource Types** at different locations;
 - Specific **Resource Setups**;
 - Or specific **Resource Characteristics** (equipment or other room features).

Reports

The **Reports** link is available to some users in the **Tool Bar** at the top of the page. The following tips will help when using the standard reports:

- The **Report Type** drop-down displays categories of reports. Commonly used reports are frequently found in the **Activities and Details**, **Managed Services** and **Resource Utilization** sections.
- You can choose easy **Time Ranges** with the top radio button, or chose a **Custom Time Range** with the bottom one.
- Using the **Scope**, the report can be limited to a single room, group of rooms or location.
- Under **Report Details**, many reports will have a text description and picture of the page format. The **Mark Report as Favorite** will allow you to identify favorite reports you can name as desired. A favorite report will appear at the top the next time you visit the Reports page, and usually maintains the selected Time Range, Scope and Report Format that were set when the report was marked as a favorite.
- Some reports will include other filters under the **Additional Criteria** section.

Setting Personal Defaults

Your personal options allow you to change your preferences such as default location, language and country.

- 1 To change personal options, click on your name on the upper right hand corner of the screen and select **My Information**.



- 2 If necessary, you can adjust the language displayed and which countries are displayed in the

calendar view. Use the **Language** and **Holiday** drop-down boxes at the top of the page.

- 3 Use the drop down lists to choose your home location under **Default Location** and **Default Group**.
- 4 The **Default Calendar View** sets your preference for which calendar view is shown. You may choose Daily, Weekly or Monthly.
- 5 **Time Format** choices will show the calendar in an AM/PM format or in 24-hour format.
- 6 To be reminded of the **End of Recurring Reservations**, check that box. You can designate the minimum number of reservations that must be in the series before you are notified and at what point (number of remaining occurrences) the reminder should be sent.
- 7 Click the **Submit** button to save your choices.