Resource Scheduler™
2000 Browser Based Scheduler

User Guide

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RedESoft Resource Scheduler
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Welcome to the RedESoft Resource Scheduler User Guide!

RedESoft Resource Scheduler is the 100% web-based resource scheduling software designed exclusively with business resources in mind. The user interface allows you to easily view and reserve resources such as conference rooms, vehicles, a/v equipment or staff, or you can customize the program to include just about any resource you may need to achieve your scheduling goals.

Your administrator configures the application characteristics and defines the groups of available resources. Once configured, you will find that choosing the appropriate group or resource from the Navigation Tree/Menu, selecting a date and time, and entering a description is all you need to know to successfully schedule your resources.

This manual will define key terms and concepts in Resource Scheduler, and provide example screens to illustrate the point. Note that the screens you see may look different, as each organization will define its own resources to be scheduled, and the characteristics of those resources. Before getting into specific features of the application, we will describe the system requirements (what your computer needs to be able to do), and some common items that you will see on each page of the application.

RedESoft Resource Scheduler excels at scheduling multiple resources. To keep these resources organized, Resource Scheduler presents the concepts of Locations, Groups and Resources. One location can contain any number of Groups, and one Group can contain any number of Resources. In the end, what you reserve and schedule is a **Resource**. The purpose of a **Group** is to logically organize similar resources. Resource Scheduler has the ability to define common characteristics of Resources within a Group, so that you can easily tell the differences between resources. For example, you might have a group of conference rooms, and set characteristics like "Network Drop Available" and "Type of White Board". When viewing the resource list, you can see at a glance what room might best fit their needs. A **Location** is a collection of Groups, and would normally be considered a geographical location. However, some organizations host offices in a campus-like environment, where it might make more sense to setup a location as a specific building. In any case, the Location-Group-Resource concept is there to help you view your resources easily as possible.

Throughout the documentation, you will see various phrases like "If configured by your administrator…" or "If your administrator allows individual user access…". RedESoft Resource Scheduler has many options that can be configured and changed to fit your organizational requirements, and as such, features are dependent of the options selected by the Resource Scheduler Administrator. There is one configuration that is of most interest to end-users: Individual User Access. When Resource Scheduler is configured to allow individual user access, end-users have options to customize certain characteristics of the application as it appears to them.   Additionally, reservations and assignments can be associated with individual users, and Email can be used to notify users of schedule changes or other relevant information. With individual user access disabled, there is no distinction between schedule end-users, and personal customization is not available. Contact your administrator if you have more questions regarding the configuration options selected by your organization.

> *Note: International and professional service users may be more familiar with the term "booking" then with the term "reservation". The two terms are used interchangeably in the manual, with "reservation" being the predominant term.*

SYSTEM REQUIREMENTS

You will be happy to know that clients (users) of Resource Scheduler are not tied to a specific operating system or browser. Please review the client requirements shown below for browser-specific requirements. Users not meeting these requirements may experience problems using Resource Scheduler.

| Client Requirements	
Browser	• HTML 4.0 compatible web browser (Microsoft IE 4.0 +, Netscape 4.0 +) • JavaScript enabled • Recommended cookies enabled • Recommended 800 x 600 or greater display size
Connectivity	Available connection (via network, Intranet, Internet or dial-up) to server running the application.
Extensibility	Optional vCal enabled PIM (i.e. Outlook, Palm) for personal calendar access. Look up vCalendar in your PIM for more information.

CONTACTING TECHNICAL SUPPORT

HTTP://WWW.REDESOFT.COM/

The latest support and product information is maintained at the RedESoft web site. Links to sales and support staff as well as product updates and frequently asked questions (FAQ) are available on the site as well. To mail support directly, simply email support@redesoft.com. Support is available free of charge for the first 90 days after product purchase. When contacting support, please provide the following information:

• Product name and your company name. These will appear near the bottom of every page in the Resource Scheduler. Calls from unregistered users/companies cannot be processed.

• Product version number. Again, this will appear near the bottom of every page in the Resource Scheduler, or on the original product CD.

• The type and version number of the browser you are using (i.e. Internet Explorer 5.0).

• Description of your computer configuration (processor, memory, etc.) and any other hardware present on the machine.

• The network type and version. You will also need to know the network rights assigned to the product directory on the network, and your user rights to that directory.

COMMON ELEMENTS IN RESOURCE SCHEDULER
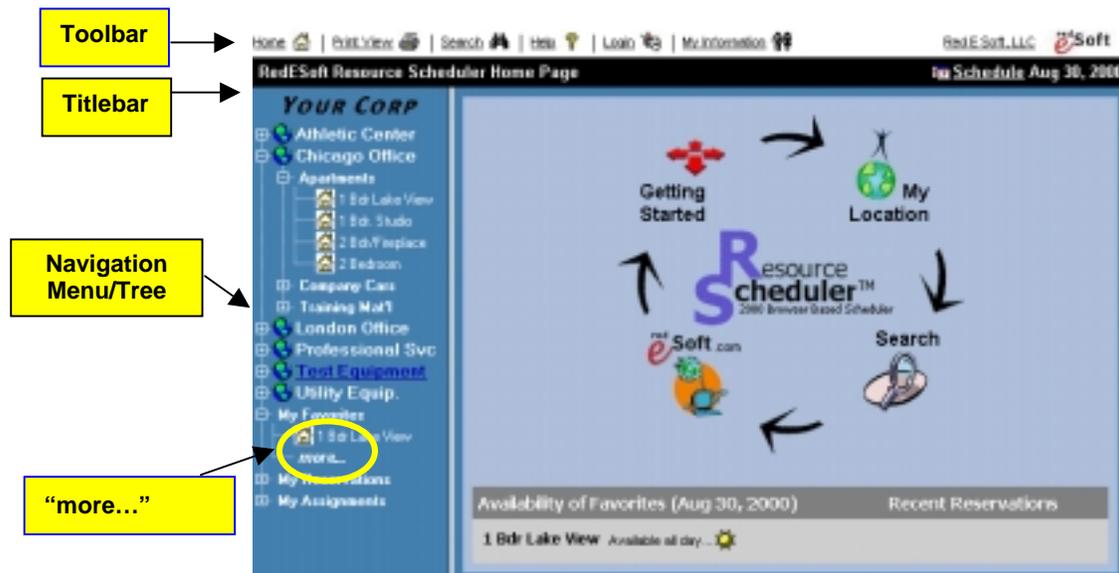
TOOL BAR

The Tool Bar is the horizontal list of options that appears above the black title bar.

HOME

This link takes you to the Resource Scheduler Home Page from anywhere within the software.

PRINT VIEW

This link brings up the page you are currently on in Print View. Print View is a printer-friendly view that eliminates the extra navigation information from the screen, allowing you to print from your browser without worrying about formatting issues. Print view is ideal when you are displaying the daily or weekly view for a resource and would like to print the page and post it outside a conference room door or similar location.

SEARCH

Clicking on the Search Icon from the tool bar brings up your search options (Text Search and Resource Search). You can also access these options from the search icon on the Home Page. For complete information about the search options, go to the SEARCH section later in this manual.

HELP

The Help Option on the toolbar links you to the complete user documentation available on-line in pdf format.

LOGIN

If your administrator allows individual users to use Resource Scheduler for scheduling purposes, you will see the Login link. Use the Login screen if you want to change the current user on the scheduler. For example, at a public station that many people use, you may want to log in as yourself after another user has used the application. See the LOGGING IN section for more information about logging in.

MY INFORMATION

If your administrator allows individual users to use Resource Scheduler for scheduling purposes, you will see the "My Information" link, where you can customize Resource Scheduler for your personal use. See the **MY INFORMATION** section for more information about configuring your personal preferences.

TITLE BAR

The black bar across the top of the page shows the title of the page you are currently viewing. On the far right of the title bar, there is a link to view the schedule (if no resources are selected, the defaults set in "My Information" will be used). The last schedule date viewed is also shown.

RedESoft Resource Scheduler Home Page   📅 Schedule Aug 30, 2000

When viewing locations, groups, or resources, the Title Bar provides a link to the schedule view for items in that resource hierarchy, as well as informational links for more information about the particular item. For example, in the image below, clicking on the name of the location (London Office) would show you the Location Information view for the London Office location. Clicking the group name (Conference Rooms) would show you the Schedule View for Conference Rooms, utilizing the currently active view option (Day, Week or Month) and the currently selected date. Clicking the Information Icon next to any of the titles will show information about that item in a pop-up window or in the same browser page, depending on your user preferences.

London Office ❶ =>**Conference Rooms** ❶ =>**Big Ben** ❶   📅 Schedule Aug 30, 2000

NAVIGATION MENU

Every Resource Scheduler page displays the Navigation Tree/Menu on the left side. This shows all Locations, Groups and Resources configured in the system. Clicking on a Location will display the Location Information Page. Clicking a Group or Resource will display the schedule for the Resource/Group selected. If your administrator allows individual users, you have the option of displaying your favorite resources (My Favorites), recent reservations (My Reservations), and assignments (My Assignments) on the Navigation Tree/Menu. These settings and other personal options are configured on the "My Information" page, which is described in detail later in this manual.

Additionally, your administrator has the option to configure Resource Scheduler to show helpful information when you move your mouse over a Location, Group or Resource. This information will show up in the status bar of your browser, and might contain information such as the resource contact phone extension, or other useful information.

"MORE…" OPTION

The first four favorites, recent reservations and assignments are shown on the Navigation tree. If there are more than four, a **"More…"** option will be added to the menu. You can click the **"More…"** option to display a report page showing all items, not just the first four.

When selecting "More…" for favorites, the report shows links to the day/week/month schedule views for that resource, as well as a delete option to remove the item from your favorite list. For Reservations and assignments, the "More…" report also shows additional information about that reservation, such as the date and time of the reservation, the primary resource and the extended description.

OTHER COMMON ELEMENTS

INFORMATION ICON ⓘ

When you see the Information Icon, it means that additional information is available about the item that the icon appears next to. Clicking the icon will show you that information either in a pop-up window, or in the same browser, depending on your personal settings.

SUBMIT BUTTON (AND OTHER BUTTONS)   Submit

When you see a button in Resource Scheduler, it will perform a certain action in relation to the screen that you are viewing. Submit typically means "Save" the changes, if any, you have made on the page you were viewing. Note that Resource Scheduler typically will try to return you to the previous page you were viewing after you have performed a "Submit", or save, action.

SCROLL BAR   ◄ | ►

When a scroll bar appears, whether in Resource Scheduler or your browser, it means there is more information available. Simply scroll up/down, or right/left depending on the bars, to view the additional information.

The administrator may control access to all locations, groups and resources in Resource Scheduler with password protection. Additionally, if you elect to set a password on a reservation, only those with the password will be able to edit or delete that reservation. The password-protected reservation will be visible in all of the day/week/month views, but if you attempt to view the details of the reservation, you will be prompted for a password.

This is the same mechanism utilized on a location, group of resources, or an individual resource. When trying to create, edit or delete a reservation on a protected location, group or resource, you will be prompted to enter the password for the "lowest level" of security present. For example, if a password is set at the group and individual resource level, then you will be prompted to enter the password for the individual resource, not the group level password. In this fashion administrators may customize the security levels for reservations and resources.

> *Note: When you successfully enter a password for a location, group, resource or reservation, that password is stored in a cookie on your PC. The next time you try to access that same location, group, resource or reservation, the cookie is used to enter the password. This saves you time, in that you do not have to continually re-enter passwords for a resource or reservation you have already provided a correct password for. For security purposes, this feature may be disabled in the user options, so that no cookies are used and password entry will be required for every action. This would be the recommended setting for computers that would have more than one user.*

Another trick to save time with passwords can be found when you set your user reservation password to be the same as your Login password. Resource Scheduler will check this and if they are the same, you can create or update reservations automatically. This reduces having to memorize infrequently used information.

When configured to allow individual user access, first-time users of RedESoft Resource Scheduler will by taken to a Login page similar to that shown in below. If individual user access is not allowed, first time users will be taken directly to the Resource Scheduler Home Page and no special Login action is required.

The Login screen can be accessed at any time by clicking on **Login** on the Toolbar, above the Title Bar. Use the Login screen if you want to change the current user on the scheduler. For example, at a public station that many people use, you may want to log in as yourself after another user has used the application.
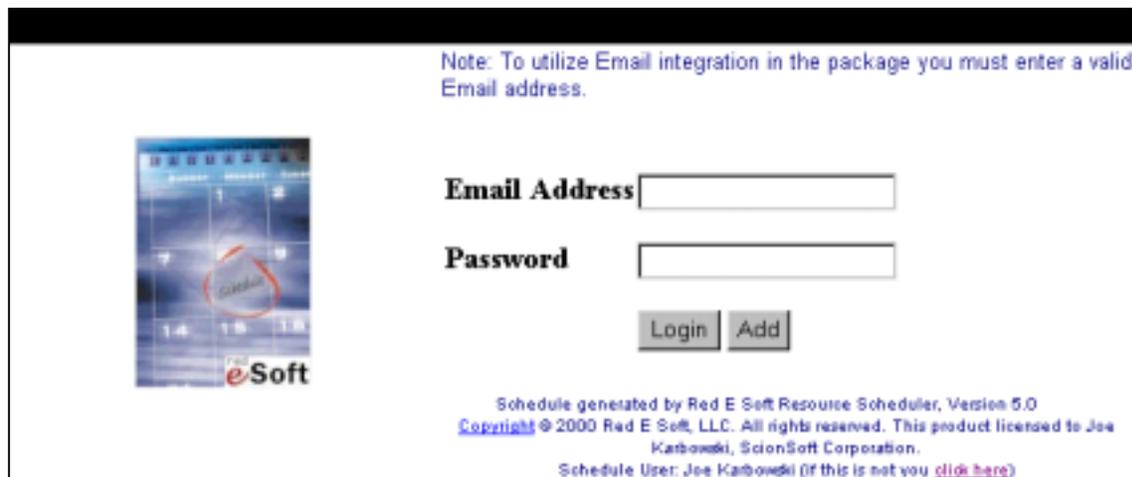
To log in to Resource Scheduler:

1. Enter your Email address

2. Enter your password. Passwords may use any character, up to a maximum of 30 characters in length.

3. First time users should select the Add button, while those who have logged on in the past may select the Login button.

    NOTE: If your administrator has provided you with Login information already, your user information already exists and you can select the Login button instead of Add.

First-time users will be taken to the **MY INFORMATION** page after logging in (see the Section titled "My Information" for more about this page). Once your personal options have been configured and saved, the Home Page appears.

    NOTE: If you have already used the system but have forgotten your password, contact your administrator.

The Home Page is the default start page that appears after you have logged on. The Home Page includes links to various areas in the application. If your administrator has set up Resource Scheduler to allow individual users, you will see the availability of your favorite resources for the current date, and links to recent reservations you have made. Your administrator may have configured the Home Page to include your company logo in the center of the page.
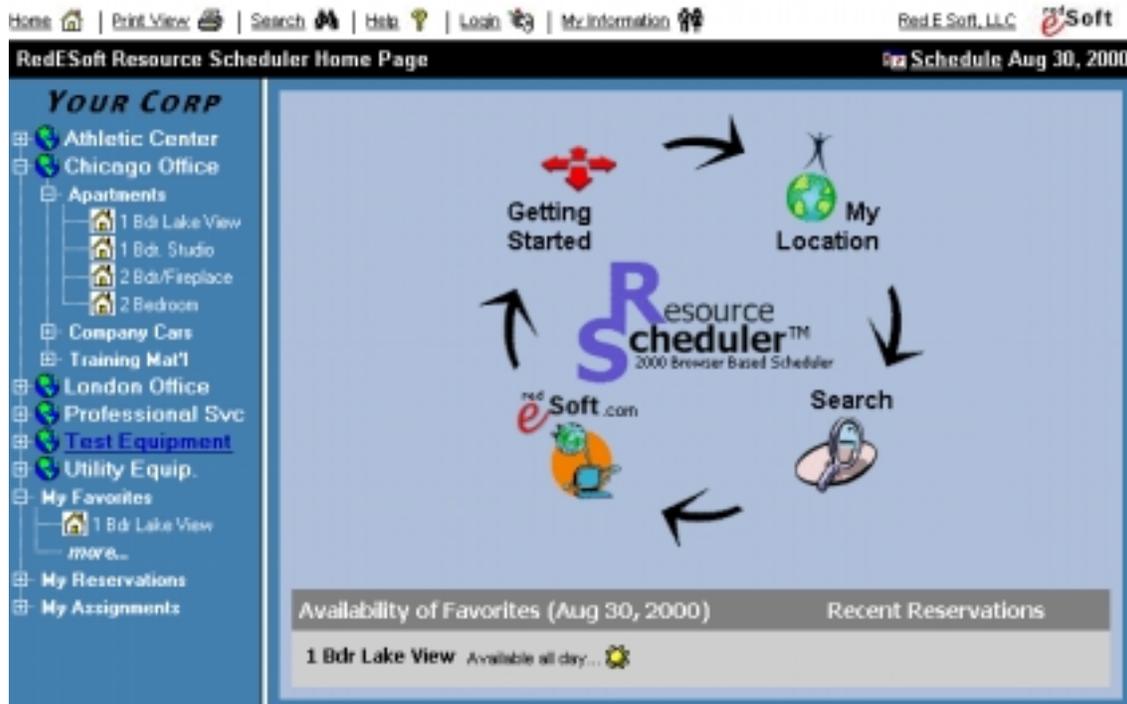
From the home page, you can utilize any of the Common Resource Scheduler Elements to link to a new page, or to view the schedule for a group or resource. The home page presents four simple navigation icons:

- **Getting Started**
- **My Location**
- **Search**
- **RedESoft.com**

If your system is configured to allow individual user access, the availability of your favorite resources, and any recent reservations you have made, will be also be shown.

HOME PAGE NAVIGATION ICONS

GETTING STARTED ICON

Clicking this icon takes you to the Getting Started page, where you are provided with a brief tutorial regarding the application. Also, the getting started page has links to the various help pages available in the application.

MY LOCATION ICON

Clicking this icon takes you to the Location Information Page. Information about that location, including any contact or other associated information, will be shown. Weather information, if enabled is also shown on this screen. Next, a list of all the groups and resources and their characteristics is shown, including links to view the Day/Week/Month view schedule for that item.

This is a good way to view all of the resources (and characteristics) available at a location if you are not familiar with that specific location.

> *NOTE: Reservations are made at the time shown, for the time zone specified by that location. For example, if your company has offices in New York and California, when viewing schedule information for New York, a reservation from 8-10 am would mean 8-10 am Eastern Time, while 8-10 am in CA would be 8-10 am Pacific time. Resource Scheduler calculates the correct time zones for you. Simply reserve your resource at the time you need it.*

SEARCH ICON

Clicking this icon takes you to the Search page, where you are provided with search criteria regarding resource availability or searching existing reservations. There is no difference between clicking this search icon and the search icon shown in the toolbar.

REDESOFT.COM ICON

Click on the RedESoft.com icon on to see the latest support information and news from RedESoft, or to email questions and comments about Resource Scheduler.

AVAILABILITY OF FAVORITES

This section of the Home Page lists the availability of your favorite resources for the date shown. Note that this date is the last date viewed in the schedule display, so it may change as you navigate through the application reviewing schedule information.

To set up resource as one of your favorites, see "Adding to My Favorites" later in the documentation.

RECENT RESERVATIONS

Recent reservations you have made are listed on the bottom right of the Home Page. Note this does not show old reservations that have already past. This section can serve as a reminder of upcoming responsibilities or meetings.

LOCATION INFORMATION

Location information is shown whenever you select a location from the navigation menu, or visit "My Location" from the home page. Information about the selected location, including any contact or other associated information, will be shown. Weather and time zone information, if enabled by the administrator, is also shown on this screen. Next, a list of all the groups and resources and their characteristics is shown, including links to view the Day/Week/Month view schedule for that item. This is a good way to view all of the resources (and characteristics) available at a location if you are not familiar with that specific location.

> *NOTE: Reservations are made at the time shown, for the time zone specified by that location. For example, if your company has offices in New York and California, when viewing schedule information for New York, a reservation from 8-10 am would mean 8-10 am Eastern Time, while 8-10 am in CA would be 8-10 am Pacific time. Resource Scheduler calculates the correct time zones for you. Simply reserve your resource at the time you need it.*

The **Click for More Information** link allows you to see detailed information about the location, if you are unfamiliar with it. Your administrator may include information such as time zone, location address and contacts at the location, as well as maps and driving instructions.
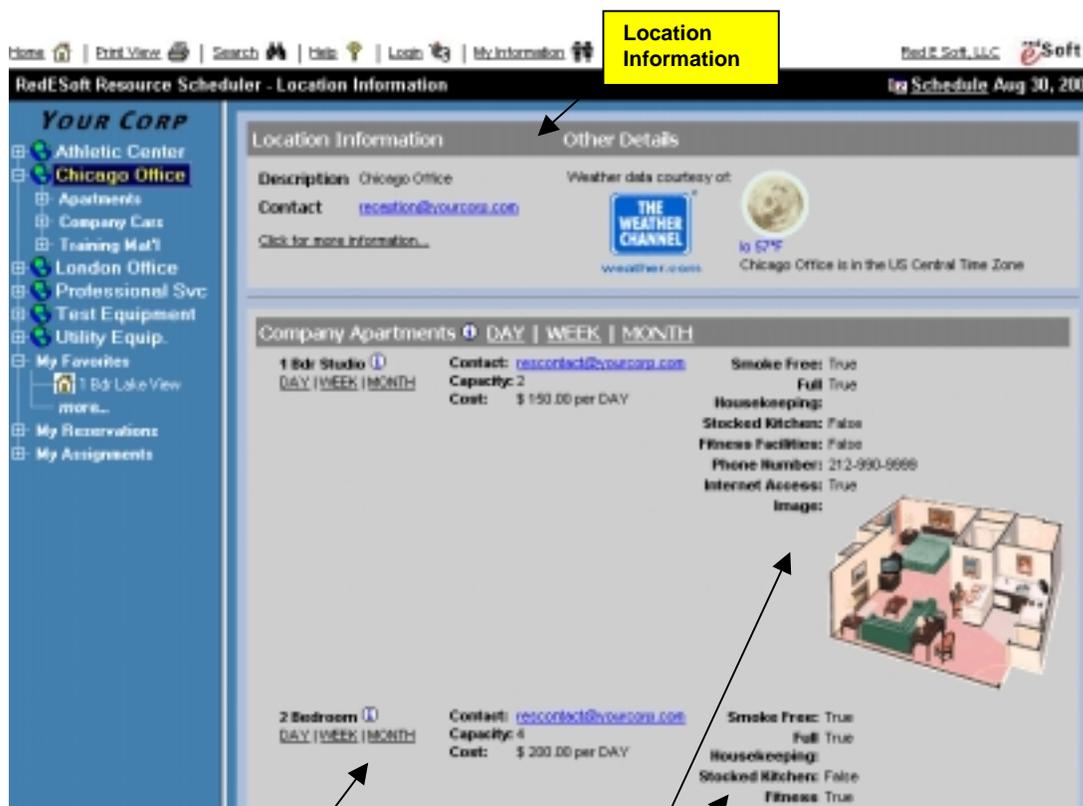
SEARCH

From the Search Icon, you can conduct information searches in two different ways: Text Search and Resource Search. A Text Search helps in quickly locating a reservation, while a Resource Search allows you to retrieve a list of resources or activities based upon your search criteria.

TEXT SEARCH

A text search will search reservation titles for the text that you enter (type in the text to search for in the space provided). You can opt to search the extended reservation description, or, if your administrator has enabled individual user access, only reservations that you have made. Select your criteria and press the Search button to retrieve the results.

RESOURCE SEARCH

To perform a Resource Search, there are two basic options:

SEARCHING FOR AVAILABILITY OF A RESOURCE

When searching by availability, the return list will include the date, resource and the available time for resources meeting the selected criteria. Results will be returned for each date in the range selected, and show the availability of each resource. Clicking the Day View icon shown

Date	Resource Availability
8/29/00	1 Bdr Lake View Available all day...
8/30/00	1 Bdr Lake View Available 5:00PM - 8:00PM
8/31/00	1 Bdr Lake View Available all day...

after the availability information will take you to the day view for the resource and date selected.

SEARCHING RESOURCE ACTIVITY (RESERVATIONS)

When searching by activity, the return list will include the date, resource, title and extended description, plus any reservation characteristics (special setup, lunch) for reservations meeting the criteria selected. Each reservation shown has a link to the Reservation Detail page to view more information about that reservation.

Date	Resource Availability			
8/29/00	1 Bdr Lake View None			
8/30/00	1 Bdr Lake View	Title: Outside Consultant Last Mod By: Joe K.	Reserved: Aug 30 2000 8:00AM - Aug 30 2000 5:00PM Primary Resource: 1 Bdr Lake View	Lodging Staff Notes: Stock beverages Purpose of Stay: Consultant for ABG project Hosting Guests: Yes
8/31/00	1 Bdr Lake View None			

The other criteria selected (date or time, etc.) apply to either activity or availability. The start date/end date are required for the search, and all others fields are optional. If capacity is not an issue, simply leave it at zero.

You can refine the search by selecting a date and time range. You can also run the search for all resources, or select a specific location, group or resource. Lastly, you can narrow the search to check a user-defined field for a particular value. For example, this is a good way to easily search for what reservations might need lunch or catering services, or special setup options

PERSONAL INFORMATION

User Number	This is for informational purposes only, and cannot be changed.
Name	Enter your name, as you would like it to appear.
E-Mail	Enter your E-Mail address. This is used for Login purposes, and for any notification from Resource Scheduler about changed reservations
Password	Enter the password you would like to associate with your E-Mail address to log in to Resource Scheduler. This password is NOT connected with any reservation security.

OPTIONS

Language	Changes the language display for calendar information. (This function is only available in the enterprise edition.)
Country	Controls what holidays are displayed within the schedule, specific to your country. (This function is only available in the enterprise edition.)
Refresh	Specifies the time interval, in seconds, in which the schedule display will automatically refresh. Browsers do not automatically check the database to see if there is new schedule information available. If zero, your browser will not automatically refresh.

> *Note: This does not affect the actual schedule or reservation in Resource Scheduler. All reservations are immediately updated in the scheduler.*

Allow Assignments	If checked, other users will be able add you to a reservation. Being assigned to a reservation means you will be notified about any changes or deletion of that reservation.
Info as Popup	If you check yes here, the information icon will appear in a popup window outside the browser.
Use Cookies as Passwords	If enabled, cookies (little bits of information stored by the browser on your computer), will store the password values you enter for secure reservations, locations, groups or resources so you do not have to re-enter them. Some companies do not allow browsers to use cookies so this may not be available to you.
Show My Favorites	Any items selected as favorites will appear as such on the navigation tree.
Show My Reservations	Recent reservations you have made will be shown on the navigation tree.
Show My Assignments	Reservations you have been assigned to will be shown on the navigation tree.
Default Location	The location you set here controls the "My Location" link from the default page.
Default Group	When you click the schedule without specifying any criteria, the group specified here will appear.
Default View	When you click the schedule without specifying any criteria, the view specified here will appear.

GENERAL CONCEPTS

You may view schedules for either a group of resources (i.e. Conference Rooms), or for an individual resource (i.e. Conference Room 1B). You can select the Group or Resource from the Navigation Tree that appears on the left side of all Resource Scheduler pages, or from any favorites you have configured. Additionally, you may elect to view the Daily, Weekly, or Monthly schedule for the selected Group or Resource. This means there are six possible schedule displays that you may view: the Daily, Weekly or Monthly view for a resource, and the Daily, Weekly or Monthly view for a group. While the look of each view is slightly different, the concept is the same: to show the existing reservations for the resource(s) selected.

COMMON AREAS OF THE SCHEDULE DISPLAY

While the look of the schedule may change slightly, there are common areas to every schedule display.

ACTIVE DATE

The active date shows the date range of the schedule currently being displayed.

VIEW SELECTION

The current view can be changed to Daily, Weekly, or Monthly via the View Selection tab.

> *Note: Once in a given view, clicking the forward and back arrows will move you forward or back in time based on the view (i.e. clicking the forward arrow in the week view will show you the schedule for the next week).*

ACTIVE RESOURCE OR GROUP

Displays the title of the currently active resource or group. Clicking this title will show you more information about that resource or group as established by the administrator.

WEATHER/TIME

Displays the weather information (if enabled by the administrator) for the location where the current group or resource is located. This information is updated every hour. Time zone information is established by the administrator, and applies to all resources at that location. If enabled, clicking the time zone information will link to the world time clock to show the current time in that location, including adjustments for time zone differences and daylight savings.

SCHEDULE CALENDAR

The schedule calendar is located on the upper right side of the screen when viewing resource schedules. This calendar allows quick and easy navigation to a specific day, week or month. Clicking on a day in the calendar will display the schedule for the active group or resource. The view (Day, Week, Month) will remain what it was prior to changing the date. Clicking a month will change the active schedule display to that month, while selecting the arrows next to the year display will increase or decrease the current year.

QUICK RESERVE INFORMATION

Quick Reserve allows you to quickly reserve a resource, or proceed to create a more detailed reservation that might include additional resources or a recurring schedule. See more about Quick Reserve functionality in the **RESERVING RESOURCES** section.

SCHEDULE FOOTER

The schedule footer shows the current license information for the product, and a link to the RedESoft copyright statement. Additionally, if you are viewing a Resource (as opposed to a group), and the resource is not currently a favorite, a link to add the resource to your favorites list will be shown.   Add this to my favorites...

SCHEDULE VIEWS

GROUP VIEW

Group views are ideal for seeing which resources are available if there is more than one resource and you do not have a strong preference. Groups can be shown in day, week or month formats. For example, you might use a Group View/Week View when trying to view availability of a company car over a two day span. Group views also have links to the resources contained in that group, so you can drill down to the resource view to display the schedule for a specific resource. To access Group View, click on the group title on the Navigation Tree for the location of interest.

RESOURCE VIEW

When you know the room, person or piece of equipment you want to reserve and are flexible about the date and time, use Resource View to make your reservation. Resources can be shown in Day, Week or Month formats. To access Resource View, click on the resource title on the Navigation Tree for the location and group of interest. Additionally, while in group view you may click on the resource name in the schedule display area to "zoom" in on that resource (changing from Group View to Resource View).

DAY VIEW

The Day View is best when you want to find an available time slot for a group of resources or if you want to see all the detail for a specific resource. The access the Day View, click on the Day tab located above the schedule or click on any date in the schedule in the Month View. Use the arrows located on the tab to move forward or backward one day at a time, or click on the calendar to move directly to a date.

WEEK VIEW

The Week View is convenient when you need to check out a resource for several days or if you are looking for an opening for a specific resource during a given week. Using the week view, you

can look at groups of resources or an individual resource. Access the Week View by selecting the tab above the schedule, or click on the week icon to the left of the schedule when in the Month View. Clicking on the any day in calendar will keep you in Week View mode, but will take you to that specific day.

MONTH VIEW

The Month View is designed to give a quick visual representation of how utilized a resource is. When used to display a group of resources, each day is highlighted in red, yellow or green. Green means the resource is available for that day; Yellow means the resource is partially available, while Red means the resource is entirely booked for the day. When looking at a specific resource, the Month View allows you to check availability of a resource for an extended period. This works well for lengthy stays in company provided living quarters. Access the Month View by clicking on the Month tab above the schedule, or select any month displayed on the calendar.

No matter what Schedule Display you are viewing, you are always just a few clicks away from making a reservation. The Quick Reserve area of the schedule display shows the resource, date and time options for your current view, allowing you to quickly enter the specifics for your information along with a description.

To Make a Reservation:

1. Select the Reservation from the drop-down list. Only resources relevant to your current view will be shown (i.e. a single resource in Resource View mode or the list of resources for a group in Group View mode).

2. Select the date of the reservation. Again, only dates relevant to your current Date View mode will be shown (current date for Day view, or dates in the active Week/Month being viewed).

3. Enter starting and ending time of the reservation. The administrator has configured the available times, as well as the reservation increments (i.e. 15-minute, 30-minute increments). If the reservation is for the entire day, select the "All Day" checkbox.

    NOTE: If the selected resource is unavailable at the time you have reserved, you will get an error message. To quickly search for an open reservation time or date, see the Search section earlier in this document.

4. Enter a description of the reservation. This is a required field.

5. Click the **Save** button to simply save the reservation as it stands, without adding any additional information. You can always edit the reservation later to change or add information.

6. Click the **More** button to add resources (such as a/v equipment for a conference room) or expand on the information about the reservation, such as if it is a recurring reservation. See the DETAILED INFORMATION ABOUT YOUR RESERVATION section for more information on this kind of reservation.

7. If the resource you have selected has been configured by the administrator to be a secure resource (either the resource, group or location is password protected), you will be asked to enter the password before the reservation can be saved. If you fail to enter the proper password, your reservation will not be saved.

When you follow a link to the detailed information about a reservation, you are able to review the reservation and update relevant information. There are many ways that you can be shown a reservation detail link: from the My Reservations or My Assignments section of the Navigation Menu, from the results of a Search, or when viewing the Day, Week or Month views of a particular Group or Resource.

To modify a reservation:

1. Click on the link to the reservation you are interested in.

2. If the resource you have selected has been configured by the administrator to be a secure resource (either the resource, group or location is password protected), or the reservation has been secured with a password, you will be asked to enter the password before the reservation can be edited. If you fail to enter the proper password, you will be denied access to the reservation.

3. If the reservation is not secured, or you enter the proper security information, the Reservation Detail Screen will display.

4. On the Detailed Reservation Screen, you can make any necessary adjustments to your reservation. You must select a new time for a time change. When you make a time change, all users will be notified via email of the change. See the **DETAILED INFORMATION ABOUT YOUR RESERVATION** section for more information about editing reservations.

DETAILED INFORMATION ABOUT YOUR RESERVATION

You can view details about a reservation on the Reservation Detail page. This is also where you can make changes to your reservation, including time or recurring options. You can access the Reservation Detail page by clicking the **More** button when you first create the reservation, or by clicking on the various reservation links that are presented in the application.
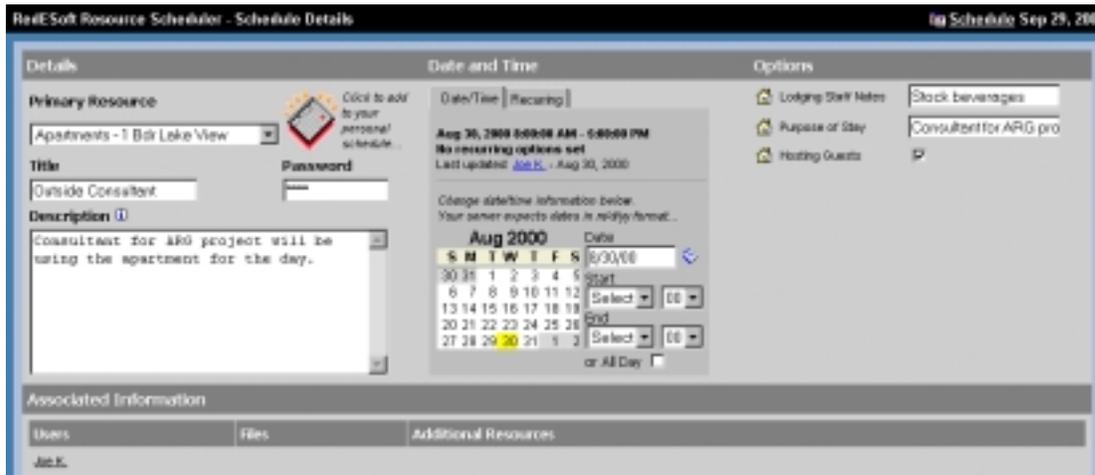
If you want to change any of the information about the reservation, simply edit it and select the **Save** button. If it is a recurring reservation, you will be prompted if you would like to update all future recurring reservations as well.

Select the **Delete** button to delete your reservation. If it is a recurring reservation, you will be prompted if you would like to delete all future recurring reservations as well.

DETAILS

Primary Resource The Primary Resource is the "main resource" for the reservation. Other resources may be added as well (see **ADDITIONAL RESOURCES** later in this section). Resource Scheduler first checks primary resources for availability if you are making time changes to your reservation. If the resource is available you can make changes.

Title The reservation title is a required field on the Reservation Detail page. It is what appears on the schedule display, the reports and under My Reservations and My Assignments on the Navigation Tree/Menu. The length of the title, which can be configured by your administrator, can be between 10 and 40 characters. However, it is a good idea to keep the title brief, so it displays in its entirety, and add more information in the larger description field. Your company may use a code or standard format for the title, which simplifies reporting and search options.

Password If you do not want other users to edit or view the details of your reservation, you can protect it with a password on the Reservation Detail page. The character limit for the password is 30 characters. See the **SECURITY CONCEPTS** and **SECURING RESERVATIONS** sections for more information on security.

Description The Description field on the Reservation Detail page allows you to add text about each reservation. The description of the reservation appears on the schedule display and reports. It allows you to include notes about your

reservations for yourself or other users. You can enter up to 2000 characters in the description field.

PIM Integration

Resource Scheduler is designed to integrate with industry standards, rather than require special proprietary tools. This means you can add reservations to your vCalendar-compliant Personal Information Manager (such as Microsoft Outlook) with the click of your mouse! To add the reservation to your PIM calendar, simply click the vCalendar icon. Your browser will then create the transfer file used to load into your PIM. Click the link shown on this new screen, and you will initiate the file transfer into your calendar. For more information and steps for this function, access your specific PIM help documents. The vCalendar icon will only be visible if your administrator has enabled the PIM integration option in Resource Scheduler.

NOTE: If your PIM does not initiate a dialog with clicking on the link, but rather the browser shows textual information, your PIM has not been configured to support the vCalendar standard. See your PIM documentation regarding vCalendar integration. Netscape 4.x users will experience this if they do not have their browser configured to run the file from the host location.
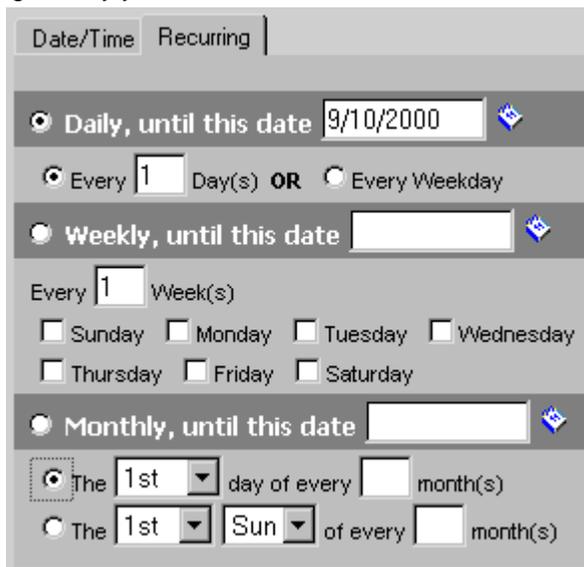
DATE/TIME TAB

The **Date/Time** tab that appears on the Reservation Detail shows the date and time of a reservation, and whether or not it is a recurring reservation. You can change the date and time of the reservation by changing the information shown.

NOTE: If the primary resource is unavailable for the new time/date selected, the change is not allowed. This prevents overbooking a resource. If additional resources are assigned to this reservation, their availability is also checked. If any are unavailable, you will get a warning message stating that some of the additional resources are not available at the new time, and those resources will not be rescheduled to the new time.

RECURRING RESERVATIONS

The **Recurring** tab, which is only available if configured by your administrator, allows the reservation to be scheduled on a recurring basis. The characteristics for the recurring schedule can be set to daily, weekly or monthly, based on the options shown.

If a recurring schedule is added, Resource Scheduler checks the primary resource for availability, as well as any additional resources. All available dates will be booked with the new recurring schedule. Dates that are unavailable (for example, someone has previously booked one or all of the resources) are skipped and shown on a report page when the record is saved. Once a recurring schedule is set, the recurring pattern cannot be changed. However, the time can be changed. If the recurring pattern must be changed, simply delete the old reservation (and all future items), and recreate it with the new pattern.

It is important to note that you must set an end date for your recurring reservation. Your administrator will have set a maximum duration for a recurring reservation, so you may get an error message if you try and extend your reservation further than allowed.

When you save a change to a reservation that is part of a recurring schedule, the change is applied to that single reservation. At that time you will then get a message box asking if you want all future reservations associated with that schedule to be changed (future to the date of that selected reservation). Click OK to do so, or Cancel to avoid updating all future items. Reservations prior to the one selected will not be affected by the change. For example, this allows you to change the time of a monthly meeting for upcoming months but leave the current month unchanged.

When deleting a recurring record, the same concept applies. You will then get a message box asking if you want all future reservations associated with that schedule to be deleted (future to the date of that selected reservation). Click OK to do so, or Cancel to avoid deleting all future items. Reservations prior to the one selected will not be affected by the deletion. For example, this allows you to change a recurring item that repeats for the next two months to only repeat for the next month.

OPTIONS

Resources that have been configured by the administrator to have optional input fields will display those fields under the Options heading. Examples might be room layout, lunch requirements, or other information specific to that reservation. Enter or select the appropriate information as needed. If the administrator has not set any optional input fields, the Options section will be blank.

> *Note: If you have multiple resources associated with a reservation, you will see all distinct option fields for those resources, not just the primary resource.*

ASSOCIATED INFORMATION

Additional information may be associated with a reservation, including Users, Files, and Additional Resources.

USERS

Associated Users of a reservation primarily exist for the purpose of E-mail notification. Any user that is associated with a reservation will receive E-mail notification (if the administrator has enabled E-mail features) whenever that reservation is changed or deleted. Another good use for associating users with reservations is for important meeting dates, so that you can see them under the "My Assignments" section of the Navigation Menu. Your organization may have other uses for the Users information, so make sure you check with your administrator to understand the proper utilization of this information.

When you first create a reservation, you will automatically be assigned to the Associated User list. If there are more users than can be displayed, a "**More…**" link will appear, which you can click on to see the complete list.

To add users:

1. Press the **Select** button next to Users.

2. Users who have made themselves available for reservations will appear on the next page. Select the appropriate users by clicking on the box before their names. Select yourself if you did not create this reservation but wish to be notified of any changes.

3. You can either add to, or replace, the existing users by changing the drop-down menu at the top of the page.

4. Click on the **Save** button when you have selected the appropriate users, or select the **Return** button to return to Reservation Detail page without making any changes.

NOTE: this option is not available if your administrator has not configured the application to allow individual users.

FILES

Files associated with a reservation might include meeting agendas, pre-meeting preparatory information, or other reservation specific documents. If there are more files than can be displayed, a "**More…**" link will appear, which you can click on to see the complete list.

To add files:

1. Press the **Select** button next to Files.

2. Click on the box next to the files you would like to include with your reservation. You can either add or replace files by changing the drop-down menu at the top of the page.

3. If you would like to upload a file to be included with the reservation, press the **Browse** button to select the file name, and then the **Upload** button to upload it. This will add the file to the list of available files to associate with a reservation. If your administrator has not configured Resource Scheduler to allow file uploads, you will not be able to perform this task.

4. Click on the **Save** button when you have selected the appropriate files, or select the **Return** button to return to Reservation Detail page without making any changes.

ADDITIONAL RESOURCES

If you want additional resources to be associated with your reservation, you can do so on the bottom of the Reservation Detail page. For example, if you are reserving a conference room and need a projector or screen, you can add those resources here. These reservations will be scheduled in the same fashion as the primary resource, meaning they will also be checked to make sure that they are not already booked during the time selected. Note that the optional reservation fields (set up by the administrator) for all additional resources will be shown in the Options area of the Reservation Detail page. If there are more additional resources than can be displayed, a "**More…**" link will appear, which you can click on to see the complete list.

To add additional resources:

1. Press the **Select** button next to Users.

2. You can either add to, or replace, the existing resources by changing the drop-down menu at the top of the page.

3. Click on the **Save** button when you have selected the appropriate resources, or select the **Return** button to return to Reservation Detail page without making any changes.

4. If any of the additional resources are unavailable during the time of the reservation, they will not be reserved. All available resources will be reserved, and considered part of the reservation. This also applies to recurring reservations - the additional resource(s) may be available for some or all of the recurring schedule dates.

5. Any changes in date or time to the reservation will also apply to the associated resources.

You can create reservations with or without passwords. However, if you do not enter a password for your reservation, anyone with access to that resource can modify the reservation. You can protect your reservation on the Reservation Detail page by entering a password. Any users (including you) who try to access that reservation will be prompted for the password. If the proper password is not provided, the user will be denied access to the reservation. As such, it is important to remember your password!

Enter a password on the Reservation Detail page to protect your reservation from modification.
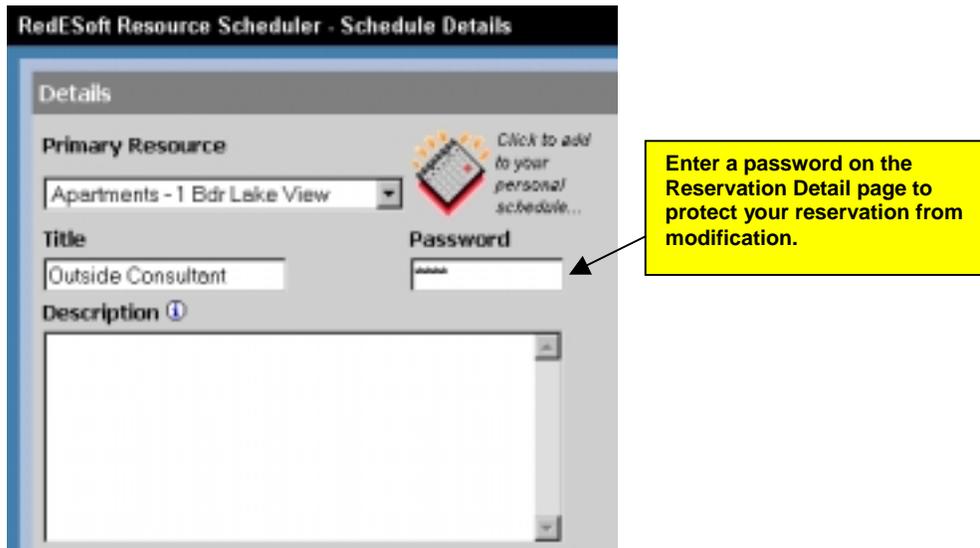
The titles of secure reservations are still displayed in the various schedule views. Additionally, secure reservations will be displayed in any search or reporting pages as well. The idea behind securing a reservation is to prevent accidental or purposeful modification to your reservations, not to make it invisible to all users. It is helpful for end users to receive visual clues to the availability of resources even if it is not something they wish to change.

See the **SECURITY CONCEPTS** section for more information on security.

> *NOTE: If you set your reservation password to be the same as the Login password, you will not be prompted for the password when attempting to edit that reservation. Often users will make the password on all reservations the same password as their Login password to simplify memorization of infrequently used information.*