

Meeting Room Manager Administration Guide

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Getting Started

What is the Meeting Room Manager?

The Meeting Room Manager module is a powerful room scheduling application designed for booking and tracking not only meeting rooms but other equipment such as data projectors. Each of the items to be tracked is called a resource in the Meeting Room Manager. The module automates the entire scheduling process. Using their web browser, your staff can access the reservation system to view and book rooms or equipment, anytime, from anywhere. Additionally, your clients can view available room and request a booking.

How do I get started?

If you currently do not have The Meeting Room Manager on your incuTrack system, contact Cybergroup to begin the implementation process. You will need to provide Cybergroup with the email address(es) of the Meeting Room Manager's administrator(s). You also will need to schedule a training session for system administrators.

Accessing the System

To access the Meeting Room Manager, login to your incuTrack account and click on the Meeting Room Manager administration link under Facility Modules.

You will see the Meeting Room Manager administration menu. (figure 1)

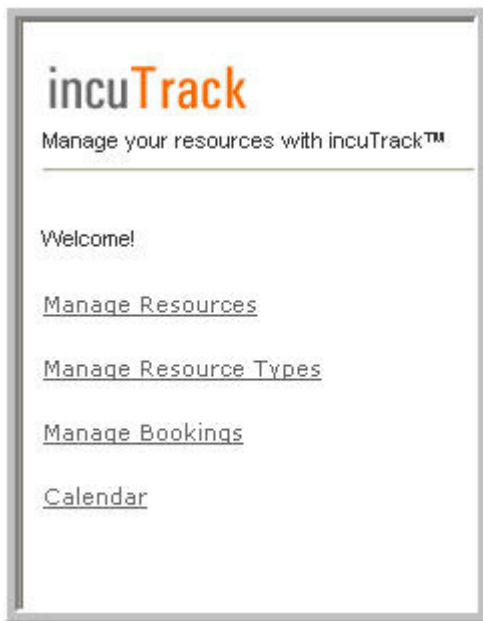


Figure 1

Managing Resources

The first step to system setup is defining your resources. You need to identify with rooms and equipment you want to track with the Meeting Room Manager and create a record for each of these resources. You will need the following information to create the resource records:

- Name of the resource (i.e.: Conference Room B, or Sony digital camera)
- Description (i.e.: 20x25, seats 24)
- Price/cost of room (This can be calculated, hourly, daily, or by your designated minimum billable increment. If no charge, set all cost fields to zero.)
- The category or resource type (i.e.: Is it a **room**, or **equipment**)
- Image of resource*
- Any additional comments*

* = Optional

From the admin menu, click on "Manage Resources". You will see a grid with all of the current system resources which have been included for demonstrative purposes. You may delete or edit an existing resource by clicking on the proper link to the right of each resource. To add a new resource to the system click on "Add Resource". (figure 2)



Figure 2

Now you will fill in the fields with the resource's information. You also may add an image of the resource. (figure 3)

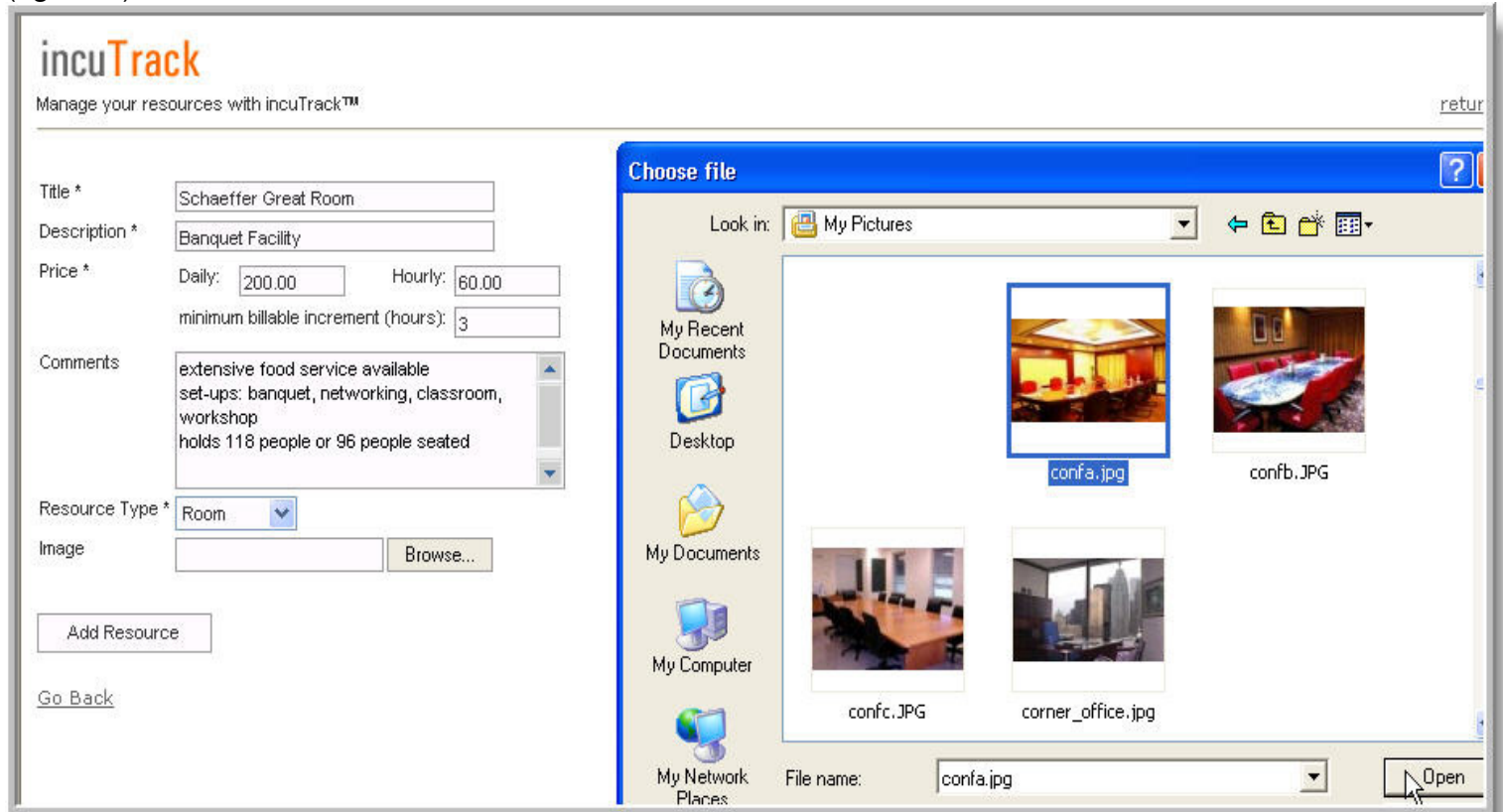


Figure 3

Title: Add the name of the resource. This will appear as a column heading on the calendar.

Description: Add text describing the resource, for example, dimensions, seating, decor...

Price: If you will not charge for the booking of the resource enter \$0 under daily and hourly and enter 0 for minimum billable increment. If you would like to see a calculated charge, enter the daily and hourly charge, and add the minimum billable increment in hours, for example 0.5 hours or 8 hours. When you add price figures here, you will see a calculated price for the room booking when you create a booking under this resource. You can use that figure as a guideline for charging but you will be able to change the actual cost on the booking to any figure you choose, including \$0.

Comments: Any additional information goes here. All of this information will be viewable to your clients when they access the system to check availability or make booking requests.

Resource Type: Define the resource as a room or equipment. (If the resource does not fall into either category, see Managing Resource Types on page 5)

Image: You may add an image of the resource by clicking 'Browse' next to the image field. You can choose a .gif or .jpeg to upload from your computer.

Finally, click "Add Resource".

Managing Resource Types

The Meeting Room Manager comes with two predefined “resource types”. These are “Rooms” and “Equipment”. If you wish to track resources that do not fall into either of these categories, you will need to create a new resource type. In this example, we will add “People” as a third resource type. See figure 4.



Figure 4

To add a new resource type or to edit an existing resource type, click “Manage Resource Types” from the administration menu. You will then see your resource types as shown in figure 4. To add a new resource click “Add Resource Type” and enter the name of the new type in the description field. Then click “Add New Resource Type” button.

You may also edit or delete an existing resource type by selecting the corresponding edit/delete links on the right side of the desired resource type.

Managing Bookings

There are two ways you can create, view, edit, copy and delete bookings on the Meeting Room Manager System. You may go through a daily calendar by clicking on the “calendar” link from the administration menu or you may access the bookings through a comprehensive grid by clicking the “manage bookings” link from the administration menu. Both the “Calendar” and “Manage Bookings” links will allow you administrative access to create, view, edit, copy, or delete bookings. This user guide will detail these actions via the calendar view, however you may choose either link to accomplish these administrative tasks.

Calendar View

To access the daily calendar as an administrator from the admin menu click on “Calendar”. You will be shown the calendar for the present date. If any of the resources have been booked for the day, you will see the time of the booking blocked off under the resource. For example, in figure 5, below, you can see that the company, Advanced Systems, has booked conference room B from 8:00 am – 12:00 pm. As an administrator, you can click on the booking to view or edit details of the booking.

The screenshot shows the incuTrack interface with the following elements:

- Logo: incuTrack
- Slogan: Manage your resources with incuTrack™
- Date selector: Go to: 05/18/2007
- Calendar grid with columns: Conference Room B, Conference Room C, Sony Data Projector
- Time slots from 6:00 AM to 1:00 PM (partially visible)
- Booking in Conference Room B: 8:00 AM - 12:00 PM, Advanced Systems

	Conference Room B	Conference Room C	Sony Data Projector
6:00 AM			
6:30 AM			
7:00 AM			
7:30 AM			
8:00 AM	8:00 AM - 12:00 PM Advanced Systems		
8:30 AM			
9:00 AM			
9:30 AM			
10:00 AM			
10:30 AM			
11:00 AM			
11:30 AM			
12:00 PM			
12:30 PM			
1:00 PM			

Figure 5

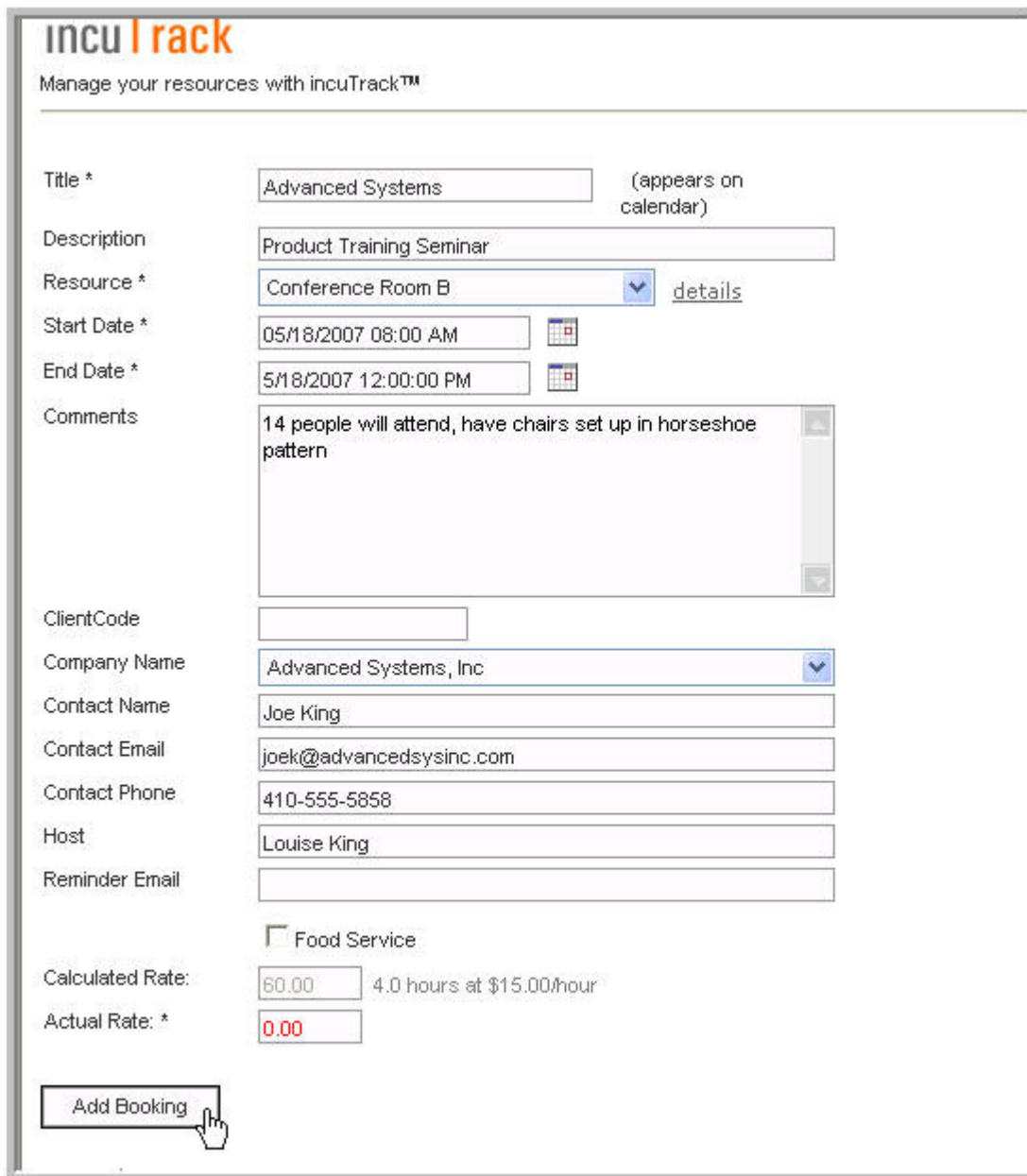
To navigate to a different date you may use the “next” and “previous” links at the top of the calendar. You also have the option of entering a new date in the “Go to:” date field or you may click on the calendar icon to choose a new date. (figure 7)

The screenshot shows the incuTrack interface. At the top left is the logo 'incuTrack' and the tagline 'Manage your resources with incuTrack™'. Below this is a 'Go to:' field containing '05/18/2007' and a small calendar icon. To the right of the 'Go to:' field are navigation links '< Prev Next >'. Below the 'Go to:' field is a table with columns for 'Data ctor', 'Overhead Projector', and 'Conferenc Room A'. The table rows represent time slots from 6:00 AM to 10:00 AM. A calendar pop-up is open over the 'Go to:' field, showing 'May, 2007' and 'Today' highlighted. The calendar grid shows dates from 17 to 22, with the 18th highlighted. A 'Select date' button is at the bottom of the calendar pop-up. Two red arrows point to the calendar icon and the '< Prev Next >' navigation links.

Figure 7

Adding a Booking

Once you are viewing your desired date, to add a booking, click and drag over the timeslot that you would like to book below the desired resource. A new screen will appear where you will enter the details of the booking. See figure 8.




The screenshot shows the 'incuTrack' web interface for adding a booking. The form is titled 'Manage your resources with incuTrack™'. It contains several input fields and a 'Food Service' checkbox. The 'Title' field is 'Advanced Systems' with a note '(appears on calendar)'. The 'Description' is 'Product Training Seminar'. The 'Resource' is 'Conference Room B' with a 'details' link. The 'Start Date' is '05/18/2007 08:00 AM' and the 'End Date' is '5/18/2007 12:00:00 PM'. The 'Comments' field contains '14 people will attend, have chairs set up in horseshoe pattern'. The 'Company Name' is 'Advanced Systems, Inc', 'Contact Name' is 'Joe King', 'Contact Email' is 'joek@advancedsysinc.com', 'Contact Phone' is '410-555-5858', and 'Host' is 'Louise King'. The 'Calculated Rate' is '60.00' for '4.0 hours at \$15.00/hour' and the 'Actual Rate' is '0.00'. A mouse cursor is pointing to the 'Add Booking' button at the bottom left.


incuTrack
Manage your resources with incuTrack™

Title * (appears on calendar)

Description

Resource * details

Start Date * 

End Date * 

Comments

ClientCode

Company Name

Contact Name

Contact Email

Contact Phone

Host

Reminder Email

Food Service

Calculated Rate: 4.0 hours at \$15.00/hour

Actual Rate: *

Figure 8

Title: This is what will appear on the calendar. It is recommended to use the name of the company as the title.

Description: Additional descriptive language describing the booking can be placed here.

Resource: The room or equipment that is being booked will appear here. You may change the resource by making a new selection from the dropdown list.

Start Date/End Date: Based on the block of time that clicked and dragged to begin the booking process, a start and end date and time will be assigned. If you need to modify the date(s) or time(s) you may modify these by typing in a new date or time into the field, or you may use the calendar icon to modify the date(s) and/or time(s).

Comments: Add any additional comments here.

ClientCode: This field can be used to place a client id number, purchase order number, or any other identifying code that you need to track in the booking process.

Company Name: Choose the company from the dropdown list. If the company does not appear on the dropdown list, choose "other" from the dropdown and then a field will appear where you can manually enter the name of the company.

Contact Name, Email, & Phone: Simply enter the contact information in these fields.

Host: If you need to identify a host or additional contact person or company use this field.

Reminder Email: If you will be sending out a reminder before the date of the booking, enter the email address for this contact. Reminder emails are sent manually by a staff member.

Food Service: If food service will be needed for this booking, check the box next to "Food Service". Checking this box will provide you with a comments section where you can describe the food service details for the booking.

Calculated Rate: A figure will automatically be calculated and will appear here. This calculation is based upon the duration of the booking and the Hourly, Daily and Minimum Billable Increment fields for each resource in the "Manage Resources" section.

Actual Rate: The calculated rate will automatically be populated into the Actual Rate field, however you may highlight this figure and type any amount, including 0 (zero) into this field.

When you have completed the fields on the screen, click "Add Booking".

Editing and Deleting Bookings

Editing a Booking

Now that booking will appear on the calendar. If you need to edit a booking, simply click on the booking block from the calendar. You will see a screen similar to the “Add Booking” screen. You may change any of the fields as desired and click “Update Booking” at the bottom of the screen. Your booking will be automatically updated to reflect the changes you made. If the changes conflict with another booking, you will receive a message that there is a conflict and your changes will not go into effect.

Deleting a Booking

If you need to delete a booking, simply click on the booking block from the calendar. You will see a screen similar to the “Add Booking” screen. At the bottom of the screen click “Delete Booking”.

Copying a Booking

Copying a booking can be used when you want to create a booking that is similar to an existing booking. Rather than creating a new booking from scratch, you can click on the existing booking and at the bottom of the screen click on “Copy Booking”. Now an “Add Booking” screen will appear with all of the fields filled in with the “model” booking’s information. Make the necessary changes, for example change the start and end date or change the resource, then click “Add Booking”. Now you have added a new booking to the calendar with minimal data entry.

For example, let’s say that Advanced Systems has booked Conference Room B from 8:00 am – 12:00 pm. Then they call and ask if you have a data projector available for rent that they could use in that meeting. You can simply view the calendar to see their booking and at a glance you can see if a data projector is available during the time of their meeting. The simplest way to add the second booking would be to click on the booking block for Advanced System’s meeting. Then at the bottom of the screen click on “Copy Booking”.

Description	Product Training Seminar
Resource *	Conference Room B details
Start Date *	5/18/2007 8:00:00 AM
End Date *	5/18/2007 12:00:00 PM
Comments	14 people will attend, have chairs set up in horseshoe pattern
ClientCode	
Company Name	Advanced Systems, Inc
Contact Name	Joe King
Contact Email	joek@advancedsysinc.com
Contact Phone	410-555-5858
Host	Louise King
Reminder Email	
<input type="checkbox"/> Food Service	
Calculated Rate:	60.00 4.0 hours at \$15.00/hour
Actual Rate: *	0.00
<input type="button" value="Update Booking"/>	
<input type="button" value="Delete Booking"/>	
<input type="button" value="Copy Booking"/>	

Figure 9

Now the booking screen appears, and all of the fields are duplicated to match the original booking. Simple make the needed change to this booking screen. In this case, we will change the resource from “Conference Room B” to “Data Projector”. Then click “Update Booking”. (Figure 10)

incuTrack
Manage your resources with incuTrack™

Title * (appears on calendar)

Description

Resource * details

Start Date *

End Date *

Comments

ClientCode

Company Name

Contact Name

Contact Email

Contact Phone

Host

Reminder Email

Food Service

Calculated Rate: 4.0 hours at \$15.00/hour

Actual Rate: *

Figure 10

The same process can be used to create recurring bookings, only in that case you will copy the booking and then change the dates of the booking rather than changing the resource, as we did in this example. Now we can see both booking on the calendar view. (Figure 11)

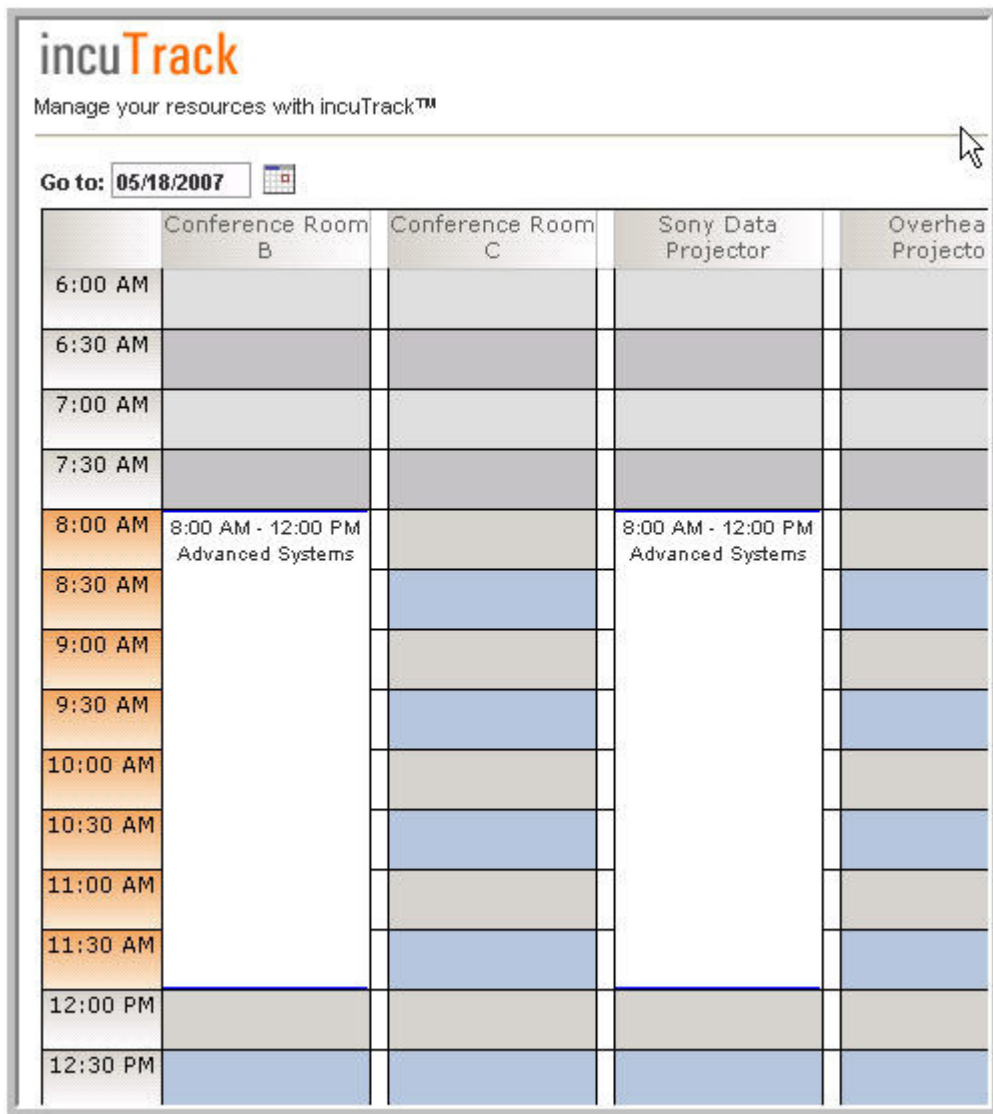


Figure 11

Sharing the Meeting Room Manager with your Clients

Once you are comfortable with the system and you would like to give your clients access to the calendar view you can provide a web link to the client's calendar view. This address can be found by clicking on "Meeting Room Manager – Client View" from your incuTrack menu. After clicking that link, look in your web browser's address window for the correct URL. By sharing this link with your client's they will be able to view the calendar and see availability of the resources. They also will have the option of submitting an electronic booking request. This will trigger an email to the Meeting Room Manager's administrator(s). The administrator(s) are responsible for following up with the client regarding the request and creating the new booking if necessary.