



Meeting Room Manager 7

User Guide

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Second Edition, MRM 7 User Guide
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CHAPTER 1 Introduction

Product Overview

Welcome to NetSimplicity's Meeting Room Manager, the easiest-to-use, most customizable room and resource scheduling application in the market. Meeting Room Manager can be easily tailored to your organization's specific operational approach to meeting room management. It allows users like yourself to quickly view and change information about existing meetings and easily reserve new meetings.

Documentation Overview

This User Guide has been created for Meeting Room Manager users. It contains all of the information that day-to-day users require, but does not include administrative information. Additional documentation available for this version of Meeting Room Manager is as follows:

- MRM 7 Installation Guide
- MRM 7 Enterprise Administrators Guide
- MRM 7 Pro Administrators Guide
- MRM 7 Release Notes
- MRM 7 Fixed Issues List
- NetSimplicity Knowledge Base

Each of these documents is available on the NetSimplicity customer support website. Log into the customer support website by visiting:

<http://www.netsimplicity.com/support>

Meeting Room Manager Editions Overview

There are three editions of Meeting Room Manager 7 that are available for purchase.

Some of the features in Meeting Room Manager 7 are not available in the Basic or Pro packages, or are optional in the Pro or Enterprise packages. The matrix below outlines these differences between the available packages:

Feature	Basic	Pro	Enterprise
MRM Architect	✗	✓	✓
Advanced Catering	✗	○	✓
Active Directory Service Integration	✗	✗	✓
Advanced Outlook Integration	✗	✗	✓
LCD Panels	✗	○	○
Room Wizard Panels	✗	○	○

This User Guide has been written as though all of the Meeting Room Manager 7 features are available.

Understanding Users

This document primarily covers the functions handled by a typical user, yet it is helpful for users to understand how what they do affects other users in different roles than their own.

So in order to assist with the understanding of how MRM was designed to work, the following descriptions outline the five user types that are typically found in most organizations who use Meeting Room Manager.

These five user types are assigned to fictional staff in an organization with its head office in New York and an office in Seattle. The names of these users will be referenced in this document.

Kate, Global MRM Administrator, New York



Kate is responsible for high level management and configuration of the database. She is responsible to set up the database for use by users and change settings in the future as necessary. These set up functions include:

- creating security groups
- assigning each user to her respective security group
- setting database options
- adding locations
- customizing the forms, images, and labels in the interface
- setting up the advanced catering module for use

Luke, Local MRM Administrator, Seattle



Luke is responsible for local management of the database and reservations. These local management tasks include:

- adding local resources and their details
- confirming meetings that have been requested or otherwise require a confirmation
- providing usage data to local management

Juliette, Local Service Administrator, Seattle



Juliette is responsible for local Advanced Catering module (ACM) management. These ACM tasks include:

- setting up local menus, food item availability, and pricing
- confirming and refusing order requests

Charlie, User, Seattle



Charlie is responsible for scheduling reservations and placing ACM requests as required.

Though users are granted permissions to create reservations, Kate as global administrator may choose to require that each booking placed by a user is confirmed by an administrator like Luke.

This User guide is designed for users like Charlie.

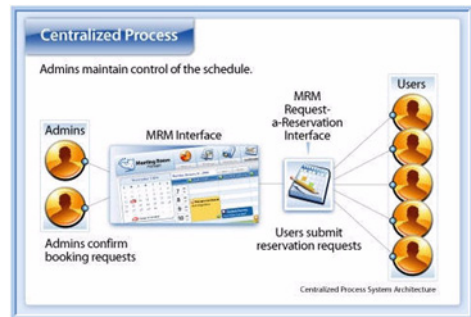
Bob, Requesting User, Seattle



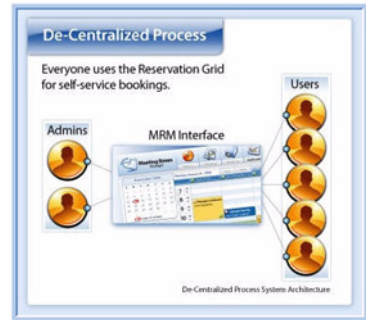
Bob is responsible for requesting meetings as required through the Meeting Request form. He cannot choose the resource (room) in which the meeting will be held.

Because Bob is not a user who accesses the MRM interface, this User Guide does not apply to him. Therefore, sections of this guide which apply to all user types do not apply to requesting users.

There are two typical cases where the Meeting Request form would be used. The first is referred to as a centralized process. A few administrators control the database and anyone who wishes to make a reservation must place a request and have it confirmed and assigned to a resource by an administrator.



The second process is called a de-centralized process. Most staff use the Meeting Room Manager user interface to schedule self-service bookings. The Meeting Request form is used only for guests who require the use of resources. For example, a consultant may need to host a meeting or use a room as an office for a short period. To save administrators the time of creating usernames for these short term guests and to provide an extra element of security, these guests can only request meetings.



System Requirements

In order to run Meeting Room Manager, you need to have the following hardware and software:

On the Server:

Minimum

- Pentium III or better processor
- 300 MB of available hard-drive space
- 512 MB of RAM
- Windows 2000/2003 Server
- Microsoft® IIS 5.0 or above
- Microsoft® .NET Framework 2.0
- Microsoft® SQL Server 2000 and above

Recommended

- 2 GB of RAM
- 128 MB of additional RAM for every 20 concurrent licenses
- Dual processors operating at 3 Ghz (Intel Xeon)
- Crystal Reports 11 or above (optional to design reports)

On Each Workstation:

- Web browser: Microsoft® Internet Explorer 5.x and above is recommended
Pop-up blockers must be turned off in order to perform some specific functions
- Email features (optional): Outlook 2000 or above is recommended but other MAPI-compliant email clients can be used
- Outlook Integration features (optional): Outlook 2000 or above

CHAPTER 2 Getting Started

Run Meeting Room Manager

Meeting Room Manager is run from your web browser.

To run Meeting Room Manager:

1. Launch your web browser.
2. In the address line of your browser, type the name of your web server followed by the Virtual Directory name, for example:
`http://webserver1/MRM7/`
3. Depending upon your settings, you may be asked for your username and password in order to log into the Meeting Room Manager database.
4. If your MRM administrator requires you to confirm your user profile information before continuing, your User Profile detail form opens. Enter the required information and then click OK.



It is important that you enter an email address you check frequently as important notifications from Meeting Room Manager are sent to this address.

5. Meeting Room Manager opens.

Edit Your User Profile

You may be prompted to edit your user profile the first time you log into Meeting Room Manager. Later on, you can go back and edit your user profile by clicking on the Edit User Profile icon at the top right of the main screen.

While editing your user profile, you can change the following information:

- **Username**

This is the name you enter on the login page if using MRM Authentication. If Windows Authentication is in use, this field cannot be edited.

- **Password**

This is the password you enter on the login page if using MRM Authentication. If Windows Authentication is in use, this field cannot be edited.

- **Full Name**

This is your full name.

- **Email Address**

This is the email address which will receive any email notifications sent by Meeting Room Manager.

- **Default Location**

This setting resets your My Location setting each time you log in. You can change your My Location setting without affecting your default location. This allows you to temporarily choose a different location as your current location view if you're travelling to that office, for example. You would do this to ensure that you see meetings in the time they occur at the location you're travelling to.

For more information on your My Location setting, refer to the "My Location" section of this chapter.

MyLocation

The My Location setting allows you to set the location and therefore the time zone which you are currently in. All time references for meeting start and end times are based on your time zone. Make sure to set your My Location setting accurately so that reservations display their times in your time zone.

Your My Location setting is overridden by the default location set in your user profile each time you log in. If you wish to update your the location you regularly work in, update your user profile information. Refer to the "Edit User Profile" section of this chapter for details.

You may choose to change your My Location setting if you are travelling to a different office location, for example. This allows you to see reservations at the time they will take place where you will be.

To change your current My Location setting:

1. On the left side of the main screen, select Set Current Location.
2. Click the My Location pull-down menu and select the location which you are currently at.
3. Click OK to save the My Location setting.



Your MyLocation setting will be overridden by the default location in your user profile the next time you log into Meeting Room Manager. To change your default location, refer to the “Edit User Profile” section of this chapter.

Log Out

Logging out ends the user session and releases the concurrent user license that was in use making it available to other users. If a user closes his web browser without clicking the Logoff button, the user session will time out after 20 minutes by default. The time out duration can be changed by a global administrator like Kate.

1. To log off Meeting Room Manager click the Logoff icon.
2. The default database Logged Off page opens.
3. To log back into the Meeting Room Manager default database, click on Login.

Understanding Your Reservation Database

Your reservation database consists mainly of reservations, but it also contains options, permissions, form layout information such as customized tabs and fields, room details and reports. Customizations and setting changes can be made by your MRM administrator like Kate.

What is a Resource as Opposed to a Requirement?

When a reservation database is created, resources and their respective details are added to the reservation database by an administrator. These resources can then be reserved by users through the scheduling of a reservation. There may be requirements for a

reservation though, such as small pieces of equipment that will help the meeting to run more smoothly, things like projector screens and white boards. These smaller inventory items that wouldn't typically be scheduled on their own, are referred to as requirements. This is because they are required for the reservation. Their availability can also be tracked by Meeting Room Manager, but the global administrator, like Kate, must first set up their availability.



Resource, definition: An item displayed in the grid that users schedule reservations for. The most common example is a meeting room.



Requirement, definition: An item reserved for use from a departmental tab within the Reservation Form. Some examples are televisions, DVD players, and projection screens.

Regional Settings

The regional settings defined on the workstation in 'Start Menu > Control Panel > Regional Options', are the basis for how Meeting Room Manager displays dates, times and numbers. These settings do not affect the time zone for the user, only the format that is used to display dates and times.

For example, changing Window's Regional Settings to French (France) produces 24-hour (military) time format along the left side of the reservation grid. A date format of DD/MM/YYYY is also used.

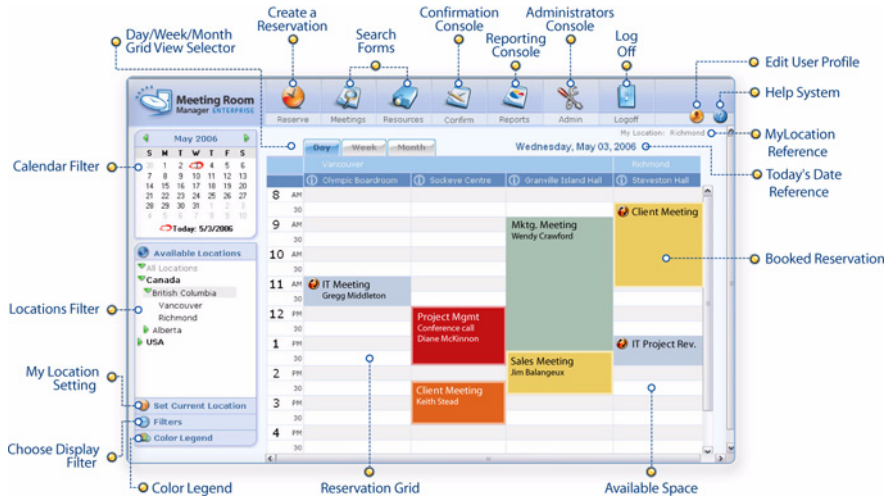
Security in MRM

Security in Meeting Room Manager follows a group-based permissions setup. The global administrator defines security groups which each contain their own unique permissions set. Users are then created and assigned to these security groups. Permissions can be assigned to these user groups for everything from who can view another user's meetings to who can modify the Reservation form using the form designer.

If you find that you do not have the permissions that you require, ask your global administrator, like Kate, to grant you the permissions you need.

The MRM Interface

Use the screenshot and descriptions below to become familiar with the Meeting Room Manager interface.



Reservation Grid

The reservation grid takes up the largest portion of the main screen. It displays reservations based on the calendar, location, and filter settings.

Available Space

Areas which display the background grey and white rows on the day view of the reservation grid are available for reserving. Click the available space below the resource you wish to book in the time slot you wish to schedule the meeting. The Reservation form opens with the resource and start and end dates and times filled in.

Booked Reservation

Booked reservation spaces display various details of the reservation based on settings determined by administrators like Kate. The meeting title is most often used, but some other details can be shown as well, such as the host, the number of attendees, or the client name.

Calendar Filter

The calendar filter allows you to filter the date range of reservations that are visible in the reservation grid. If you are using the day view, select the date whose reservations you wish to see. Similarly, if you are using the week or month view, select any date which falls in the week or month whose reservations you wish to see.

Locations Filter

The locations filter allows you to filter the locations viewed in the day view of the reservation grid. Click on a location to reveal or hide its sublocations. Click on a lowest-level sublocation to show only the resources located there in the grid. To view all resources, click All Locations. The currently selected location displays a grey colored background.

My Location Setting

The My Location setting allows you to set the location and therefore the time zone which you are currently in. Refer to the “My Location” of this chapter for more details.

Choose Display Filter

This setting allows you to set a resource and/or reservation filter for your view in the reservation grid. Some default reservation filters include My Bookings and My Meetings which allow you to quickly filter out other users’ information. Some default resource filters include ‘windows’, and ‘10 seats or less’ which filter your view to display only resources which match these requirements.

Color Legend

This legend describes the color codes you see in the reservation grid.

Day / Week / Month Grid View Selector

Reservations can be viewed in day, week, or month view. Select one of the three tabs to view the corresponding result.

Create a Reservation

Clicking the Reserve icon is one way to begin scheduling a reservation. It opens a blank Reservation form.

Search Forms

The search forms, which can be designed using the form designer, allow users to search for resources and meetings. Search results are based upon permissions to view meetings and resources.

Confirmation Console

Clicking the Confirm icon opens the Confirmation Console in which local administrators like Luke can manage and confirm reservations.

Reporting Console

Clicking the Reports icon opens the Reporting Console in which reports can be generated.

Administrators Console

Clicking the Admin icon opens the Administrators Console in which administrators like Kate, Luke, and Juliette can manage settings, permissions, meetings, and catering orders.

Log Off

Every user must click this Log Off icon to properly exit Meeting Room Manager.

Today's Date Reference

Today's date is displayed to all users as a point of reference.

My Location Reference

The current user's My Location setting is displayed as a point of reference.

Edit User Profile

Clicking this icon opens the current user's profile in which updates can be made.

Help System

Clicking this icon opens the online help system.

Resource Location Indicator

Resources are grouped in the reservation grid according to their location. The Location Hierarchy on the left side of the main screen displays a shadow on the currently selected resource. This allows you to know which location's resources you are currently viewing in the reservation grid.

Resource Details Icon

Clicking on this icon opens the corresponding resource's Resource Detail form.

CHAPTER 3 Reservations

Reservation Grid

The reservation grid displays your organization's business hours vertically with resources listed across the top. The purpose of the reservation grid is to display previous and upcoming meetings. There are three different viewing options: Day, Week, and Month.

Day View

The Day View displays the reservations of resources for a single day with resources across the top and time blocks down the left side. A heading over the resources indicates which sublocation each clump of resources belongs to. This heading is based on the sublocations below the currently selected location in the Location Hierarchy filter.

Only business hours are displayed in this view, though reservations can be made outside business hours. Reservations can be created, copied, cut, pasted, and opened in this view.

Timeline View

The Timeline View displays the reservations of resources for a single day with time blocks across the top and resources down the left side, opposite of the Day View. Only business hours are displayed, though reservations can be made outside business hours. Reservations can be created, copied, cut, pasted, and opened in this view. This view is not visible by default.

Week View

The Week View displays reservations for an entire seven day week including reservations scheduled outside of business hours. Because the width size is preset, some reservation titles may be only partially shown. Hover your mouse over a reservation to view its full meeting title.

Month View

The Month View displays reservations for an entire month including reservations scheduled outside of business hours. Because the width size is preset, some reservation titles may be only partially shown. Hover your mouse over a reservation to view its full meeting title.

Create a Reservation

Reservations in Meeting Room Manager can range from the simplest single-resource booking to reservations that involve multiple resources spanning various locations and recurring at random or regular intervals.

While this section gives you an overview of creating reservations in Meeting Room Manager, it is recommended that you also read the following sections in this chapter which pertain to the kind of reservation you wish to create.

Simple Reservation Instructions

To create a reservation:

1. Click the Reserve icon.
2. Select the resource you wish to book.
3. Enter details for the reservation.
4. Click Save and Close.

Detailed Reservation Instructions

To create a reservation:

1. Click the Reserve icon, an empty space in the Day or Timeline views, or the Add button in the Week or Month views.
2. Enter the basic reservation information, such as start and end time, and prep and cleanup time.

3. Check the box(es) beside the resource(s) that you wish to select for this reservation.
Tabs in which reservation details can be entered are displayed.



Refer to the “Multiple Resource Reservations” section of this chapter for helpful information about multiple resource reservations.

4. Enter the details into the available fields. Click on a tab to reveal the fields on it.



By default, only the Meeting Title field must be filled in. Other fields may be required as well, depending upon the customizations made using the form designer.



Different tabs may be available depending upon the resource you select. Because tab availability is based on the resource’s location, MRM administrators like Kate can change which tabs are available for each location.

5. Click the Save and Close button to save the reservation.



If your reservation conflicts with an existing reservation, it can either be saved as a wait list entry or adjusted and saved. Refer to the “Meeting Conflict Resolution” section of this chapter for more details.

6. Meeting Room Manager prompts you if a notification email should be sent. Click Yes to generate the email based on its template.

You may adjust the email and click Send unless emails are sent from the server.

Set Recurrences

You may set any reservation to recur at any interval. To do this, in the reservation’s Reservation form, check the recurrence box. In the Set Recurrence form that opens, make your selection:

Daily

Every [1] Day(s)

Change the number to specify the frequency of the occurrence. Select or deselect the Include Weekends checkbox.

Weekly

Every [1] Week(s) on [Sunday]

Change the number to specify the frequency. Select the day(s) of the week for the recurrence.

Monthly

Day [1] of every [1] Month(s) OR The [first] [Sunday] of every [1] Month(s)

Two examples are the seventeenth day of every one month or the first Monday of every two months. Change the fields as appropriate.

Yearly

Every [October 17]

To select a new date, either enter it in manually or select one from the pop-up calendar by selecting the pull-down menu.

Daily / Weekly / Monthly / Yearly Details

At the bottom of the Meeting Recurrence form are two fields. Either enter the number of occurrences or the date at which the occurrences are to end.

Next Button

On the Daily, Weekly, Monthly, and Yearly tabs, there is a Next button. Clicking this button selects the choices you have set in the tab you are in and opens the Random tab where your chosen dates are displayed. You are then able to specify further exactly which dates you would like the reservation to occur on.

Random

Select any dates from the calendar on the left. Selected dates are displayed in the box to the right. Clicking on a displayed date removes it from the list.

Find Available Resources

It is often helpful to be able to search for meetings rooms that not only match your requirements, and are available for your meeting and its recurrences.

To find available resources:

1. Ensure that the date and time fields for your reservation have been filled in. If you intend to create recurrences for the meeting, enter recurrence information as well.
2. Click the Find Available Resources icon located in the Reservation form to the right of the resources list.
3. In the Find Resources form that opens, enter your requirements. Click the Find button to display the search results.



The default location displayed in the Find Resources form is the location selected in the Locations Hierarchy on left side of the main screen.

4. If unsatisfied with the results, you may adjust your criterion and click the Find button to perform a new search. If you are creating a single reservation with no recurrences, you may also adjust the meeting start and meeting end information.



Adjusting the meeting start and meeting end information should not be done for recurring meetings.

5. Check the checkbox to the left of the resource(s) that you wish to reserve, then click the Select button.
6. The resource(s) you have selected show as selected in the Reservation form.

Multiple Resource Reservations

A multiple resource reservation is a reservation for which more than one resource or room is booked. Any grouping of resources can be selected for a single reservation, regardless of the resource's location or resource type. To make your reservation a multiple resource reservation, simply check the box next to the various resources you wish to book in the Reservation form.

While each resource's occurrence is part of the original reservation, each resources' occurrence can be opened and modified separately from the others or the original reservation as a whole can be opened and modified at one time. However, each resource's occurrence of the reservation always displays separately in the Meeting Confirmation form.

Each time a reservation is saved, even when resources spanning multiple time zones are selected, the time of the meeting is based on the time that the meeting will occur for the user booking the reservation. This information is taken from the user's current MyLocation

setting. Therefore, it is extremely important that each user always has a location in his time zone selected for his MyLocation setting.

Tabs by Resource

Once you select more than one resource in the Reservation form, a row of tabs showing each of the selected resources displays above the reservation details tabs. Select a resource's tab to display its available reservation detail tabs. Information in the reservation detail tabs can be the same for all resources involved in the booking or different for each, even within the same booking.

This feature allows users to choose which requirements are needed for each resource, what room setup is required for each different room, what catering order needs to be delivered to which room, and many other options. Keep in mind that your MRM Administrator may have customized the reservation details tabs and fields according to your organization's needs.

If you wish to copy the details from one resource to another, use the Update One and Update All buttons at the bottom of the Reservation form.

- **Update One:** click this button to make all reservation details that are contained on this tab the same for all resources involved in this booking, matching the currently selected tab.
- **Update All:** click this button to make all reservation details on all tabs the same, matching the currently selected resource.



The list of attendees is the only tab whose information is always the same for all resources involved in a multiple resource reservation.



Even in a multiple resource reservation where reservation details are different from resource to resource, the reservation's basic details, such as date and time of the meeting, remain the same.

Edit a Multiple Resource Reservation

To edit a multiple resource reservation:

1. Click on the title of the reservation you wish to edit.
This can be done either from the reservation grid or the meeting search form.
2. When prompted, select which option you wish to perform:
 - **Open Single Reservation:** Selecting this option limits the changes you make to affect this resource only.
 - **Open Multiple Resource:** Selecting this option allows you to make changes to the details belonging to any of the resources involved in this booking
3. In the Reservation form, make changes as required.
4. If the Open Multiple Resource option was selected, the Update One and Update All buttons are available.
 - **Update One:** Click this button to make all reservation details that are contained on this tab the same for all resources involved in this booking, matching the currently selected tab.
 - **Update All:** Click this button to make all reservation details on all tabs the same, matching the currently selected resource.
5. Once you are satisfied with the changes you have made, click the Save and Close button to save the reservation and return to the reservation grid.

Preparation and Cleanup Time

Time may be scheduled outside of the reservation to allow for preparation of the meeting room as well as cleanup after the meeting is finished. The default time is set by the MRM administrator like Kate.

Locked Tabs

There are two different types of locking tabs: Locked, and Lock After Save. These settings affect everyone except those with Modify Locked Tabs enabled.

Locked

A locked tab is that which can be viewed but not modified by most users. Some organizations lock the Invoice tab, for example.

Lock After Save

A lock after save tab locks once the reservation has been created and 'Save and Close' has been selected in the Reservation form. At that time, users can no longer edit the details on the tab.

The only tab that is locked by default is the Invoice tab.

Invoice Tab

The invoice tab allows organizations to keep track of billings for meetings based on the cost of selected requirements. It is auto-populated with selected requirements and their quantity. Only items selected from a tab whose Has Req setting is True are pulled as invoiced items on the Invoice tab.

By default, the invoice tab is a locked tab, which means that only users within a security group which has Modify Locked Tabs permissions may modify the dollar value for any items listed. This allows administrators to assign set dollar amounts for the rental of equipment and the provision of services such as catering. When dollar amounts are adjusted, the invoice tab does not display adjusted totals until it is refreshed. Refreshing can be forced by moving to another tab, then back to the invoice tab.

The Bill To and Ship To fields can only be modified by users within a security group which has Modify Locked Tabs permissions.

No user can modify the quantity in the invoice tab, as the quantity is controlled by the quantity specified in the corresponding number field. In the case where a checkbox indicates selection of an item, only the quantity 1 can be used.

Assign Cell & Font Colors

In addition to the standard confirmed and unconfirmed colors, additional cell and font colors can be assigned. Color codes can be created for different types of meetings. For example, management meetings might be green and new hire orientation might be orange. These colors are defined in options by the global administrator like Kate.

If this color customization has been implemented, a color is automatically assigned to a meeting that has selected a Reservation Type in the Reservation form on the General tab. This color corresponds with the Reservation Type. When a meeting has a reservation type assigned to it, the reservation type's corresponding color overrides any changes made to the Assign Color setting within the meeting's Reservation form.

To change the cell and font colors of a meeting without a reservation type assigned:

1. Click on the Meeting's title to open the corresponding Reservation form.
2. At the bottom of the Reservation form that has opened, select Assign Color.
3. The Assign Color form opens. Click on the desired cell or font color. When complete, select OK.

Request Catering

In order to request catering services using the advanced catering module, your username must be assigned to a security group whose Enable Catering permission is enabled.

To request catering:

1. Create your reservation and enter basic information, such as meeting title, start and end time, and prep and cleanup time.
2. Select the Catering tab.
3. Click the name of the category and then the subcategory that the food item you wish to request is located in.

The list of food items in this subcategory displays.

4. Hover your mouse over the food item you are considering ordering. A brief description and dollar amount display.

To select this item, click on it. The tab refreshes and adds the item to your order on the right side of the tab and displays your order's new total cost.

5. To adjust the quantity of the item you have selected, highlight the current quantity, type in the number you wish to order, then click the Refresh icon.
6. The serving time for each item defaults to the meeting's start time but can be adjusted as needed. Click inside the field and alter the serving time for each item as necessary.
7. Repeat steps three through six for each item you wish to select.

8. Click the Save and Close button to save your reservation and place your order.



If your reservation is recurring, the order is duplicated for each recurrence. If the entire reservation series is altered, each catering order is altered accordingly. If one occurrence in the series is altered, only its catering order is altered accordingly.

Priority Reservations

In some organizations there are staff members who may choose resources that have already been booked by another employee. In Meeting Room Manager, these staff members are referred to as priority users.

Priority users belong to security groups whose Priority Rights permissions are enabled. These permissions are set by location, so if you have priority rights to the boardrooms in your department, that doesn't mean that you'll have priority rights to other boardrooms in your office. You only have priority rights to the locations that your MRM administrator selected for you. If you require priority rights for more locations than you were originally granted, contact your MRM administrator.

For example, in a San Francisco office, the sales department is located on the sixth floor while the HR department is located on the fifth floor. The sales managers have priority rights to the boardrooms on the sixth floor for their client meetings, but they don't have priority rights to the boardrooms on the fifth floor.

While priority users can override reservations created by users without priority rights, one priority user cannot override another priority user's reservation.

The priority rights feature set can be turned on and off by the MRM administrator. When it is turned off, no reservation can be overridden by a priority user.

Terms

The following terms are used to describe the priority rights reservation workflow:

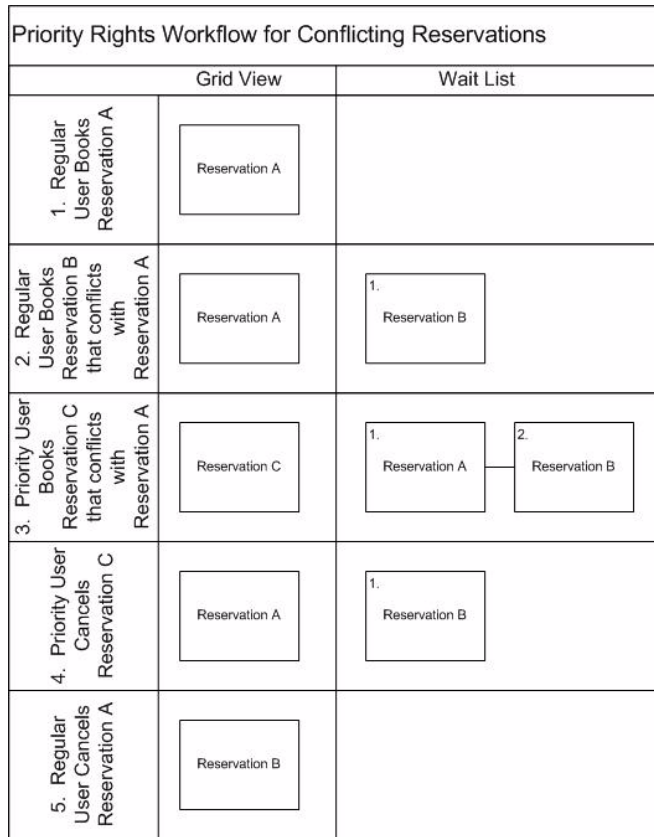
Priority Reservations. Priority reservations are reservations scheduled by a user who has priority rights for the corresponding location. Priority reservations can bump regular reservations even if they are already confirmed by an administrator. Priority reservations themselves cannot be bumped, even by users who also have priority rights.

Regular Reservations. Regular reservations are reservations that are scheduled by a user who does not have the priority rights enabled for the corresponding location. They can be

bumped by any user who has priority rights to the corresponding location. When bumped they are placed in first priority on the wait list. If the reservation which bumped the regular reservation is cancelled, the regular reservation is pushed back to its original booking space.

Priority Rights Reservation Workflow Diagram

The following diagram shows the priority rights reservation workflow:



Explanation:

1. Regular User Books Reservation A

When a user without priority rights permissions creates a reservation in the grid, the reservation is identified as a regular reservation. It can be overridden by users with priority rights.

2. Regular User Books Reservation B that conflicts with Reservation A

When another user without priority rights desires the space (time and resource) already taken, he is free to create a reservation on the wait list. Only if the space becomes available will this user's reservation get the desired space.

3. Priority User Books Reservation C that conflicts with Reservation A

A user with priority rights can take the space even though a regular user has already booked it. The regular user's reservation is bumped to the front of the wait list.

4. Priority User Cancels Reservation C

When the space becomes available, the first in line on the wait list is automatically bumped into the desired space.

5. Regular User Cancels Reservation A

When the space becomes available again, the next in line on the wait list is automatically bumped into the desired space.



For more information about the Wait List feature set, refer to the "Create a Wait List Entry" section in this chapter.

Create a Priority Reservation

Every reservation scheduled at a location you have priority rights to is a priority reservation.

With priority rights to the location you are scheduling resources in, there are two ways to create a reservation that overrides, or bumps, a regular reservation to the wait list. When you try to save a reservation that conflicts with one or more regular reservations, a prompt indicates the conflict(s) and gives you the option to override the conflicting regular reservation(s).

Alternatively, you can hover over an existing regular reservation in the Day view of the reservation grid and select the Override option. The reservation form then opens for you to enter your reservation's details. In this case you will also receive a prompt when you save that indicates the conflict(s) and gives you the option to override the conflicting regular reservation(s).

Meeting Conflict Resolution

If the reservation you are trying to save conflicts with an existing reservation, you receive a conflict message to indicate that your reservation cannot be saved. This conflict message is different for single occurrence reservations and recurring reservations.

Single Reservations

If you are trying to schedule a single reservation and you encounter a conflict, Meeting Room Manager will prompt you with a message that reads similarly to this one:

“Cannot Save. This meeting overlaps with meeting:

Executive Meeting 12/5/2005 9:00:00 AM ~ 12/5/2005 10:00:00 AM”

Three options become available:

Override. Click this button to create a priority reservation and bump the conflicting reservation to the wait list. This option is only available to users with priority rights if the conflicting reservation was created by a user without priority rights.

Wait List Request. Click this button to create a wait list entry. All of the details you have entered in the Reservation form are held in the wait list. If the space becomes available, your wait list entry is automatically moved to fill the reservation space you desire.

Cancel. Click this button to cancel the saving process and return to the Reservation form. From there you can make the appropriate changes to avoid the conflict. You may wish to change the resource, time, or date of your meeting. The Find Available Resource icon can be used to find an available room if the date and time of your meeting must remain the same.

Recurring Reservations

If you are trying to schedule a recurring reservation and you encounter one or more conflicts, Meeting Room Manager will prompt you with a report of exactly which recurrences conflict with existing meetings. The message reads similarly to this one:

“Conflicts Found.

The following meetings are conflicting with occurrences of the recurring meeting you are attempting to create:

Resource	Meeting Title	Start Time	End Time
Executive Boardroom	Executive Meeting	12/5/2005 9:00:00 AM	~12/5/2005 9:30:00 AM
Pacific Room	Client Meeting	12/5/2005 9:00:00 AM	~12/5/2005 9:30:00 AM

Do you wish to skip the occurrences that are conflicting?”

You can now make note of the conflicting reservations and click the Skip button to skip the occurrences that conflict with the listed meetings or click the Cancel button to return to the Reservation form and make the appropriate changes. The following are some recommendations as to which scenarios work best for each of these two options:

Skip

- If you wish to keep the reservation at the same time and date but wish to change the room in which the meeting is held. Ensure that you take note of the conflicting occurrences, skip them, and then create new meetings for these times in an available room.
- If you do not wish to hold the meetings at all if they conflict with another meeting.

Cancel

- If you wish to change the time of all recurrences in order to avoid the conflicts.
- If you wish to change the dates of some recurrences in order to avoid conflicts.

Create a Wait List Entry

A wait list entry is essentially a place in line for a resource and time that are already booked. The wait list contains all wait list entries and automatically manages wait list entries on a first-come first-served basis.

Wait list entries can be created two ways:

- When a user tries to save a reservation that conflicts with one or more reservations, a prompt provides the option to save the reservation as a wait list request.
- If a user sees an existing reservation on the Day view in a space he would like, he can hover over the reservation and select the Wait List Entry button.



Before users can create wait list entries, the wait list feature set must be enabled by your MRM administrator.

Time Period Blocking

In order to block off days for which your resources are not available, such as holidays, simply create a recurring all day meeting for all of your resources.

To block off time periods:

1. Click the Reservation icon.
2. Click the All Day Event checkbox.
3. Click the Recurrence checkbox.

Select recurrences as indicated in the “Recurring Reservations” section of this chapter.

4. Click the Find Available Resources button.
5. Perform a search according to the required criterion. Click Find, then select the checkbox beside each resource you wish to block off, and click the Select button.



To ensure that no resources are booked for the holidays you are blocking off, do your search based on “*” in one field while all other fields, including auto-filled fields such as Meeting Start and Meeting End, are blank. This allows you to select all resources, and upon saving, see which resources are already scheduled for the holiday.

6. Give your reservation a meeting title, such as Closed for Holiday.
7. Save and Close. If conflicts are present, you are prompted with details of the existing reservations which conflict with the reservation you are currently scheduling.



Copy a Reservation

To copy a reservation:

1. Hold the mouse over the reservation you wish to copy. From the menu that displays, select Copy.
2. Move your mouse to the time, date, and room title on the grid where the copied reservation should be placed. Click on the space.



Recurring reservations are copied / pasted as a single non-recurring reservation. Notifications are also not sent automatically.



Multiple resource reservations are copy / pasted as single, not multiple-resource reservations. For more information about multiple resource reservations, refer to the “Multiple Resource Reservations” section of this chapter.

3. To make changes to the pasted reservation and send notifications, simply click on the newly pasted meeting to open the corresponding Reservation Form.
4. When you are satisfied with your specifications, click Save and Close to save your changes and schedule the reservation.
5. Depending upon your database’s options settings and the details you have added or edited, you may be prompted to send a notification email to attendees or the head of a requirements department.

It is recommended that you click Yes when prompted, and send the email to the address that Meeting Room Manager automatically enters for you.

Your email client will not open and allow you to customize the notification if emails are sent from the server.

Open a Reservation Form

To open a reservation’s details, click on the reservation either from the grid or from a search results list.

If the reservation you wish to delete is part of a recurring series or a multiple-resource reservation, select the appropriate option from the list when prompted:

- Open Single Reservations
- Open Series

- Open Multiple Resource
- Open Multiple Resource and Series

Edit Reservation Details

Reservations can be edited at any time.

To edit a reservation's details:

1. Click on the reservation you wish to delete either from the grid or the results of a reservation search.
2. If the reservation you wish to edit is part of a recurring series or a multiple-resource reservation, select the appropriate option from the list when prompted:
 - **Open Single Reservation**
This opens the single instance that you have clicked on. Even if this reservation belongs to a series or a multiple resource reservation, only the selected instance is opened.
 - **Open Series**
This opens all instances of this recurring reservation. Even if the reservation is also a multiple resource reservation, only the recurrences that apply to the selected instance's resource are opened.
 - **Open Multiple Resource**
This opens the selected instance for all resources involved in the multiple resource reservation. Even if the reservation is also a recurring reservation, only the selected instance is opened for the multiple resources involved.
 - **Open Multiple Resource and Series**
This opens all instances for all resources involved in this reservation.
3. Edit the details on the form as required.
4. When you are satisfied with your specifications, click Save and Close to save your changes and schedule the reservation.

5. Depending upon your database's options settings and the details you have added or edited, you may be prompted to send a notification email to attendees or the head of a requirements department.

It is recommended that you click Yes when prompted, and send the email to the address that Meeting Room Manager automatically enters for you.



If emails are sent from the server, your email client will not open and allow you to customize the notification.

Cut and Paste a Reservation

To cut and paste a reservation:

1. Hold the mouse over the reservation you wish to cut and paste. From the menu that displays, select Cut.
2. Move your mouse to the time, date, and room title on the grid where the copied reservation should be placed. Click on the space to paste the reservation.



Recurring reservations are cut / pasted as a single non-recurring reservation; only the occurrence selected is changed. Notifications are also not sent automatically.



Multiple resource reservations are cut / pasted as single reservations. Only the selected reservation is updated. If you wish to update all reservations involved in a multi-resource reservation, do not use the cut / paste feature. Instead, follow the instructions provided in the "Multiple Resource Reservations" section of this chapter. For more information about multiple resource reservations, also refer to the "Multiple Resource Reservations" section of this chapter.

3. To make changes to the pasted reservation and send notifications, simply click on the newly pasted meeting to open the corresponding Reservation form.
4. When you are satisfied with your specifications, click Save and Close to save your changes and schedule the reservation.

5. Depending upon your database's options settings and the details you have added or edited, you may be prompted to send a notification email to attendees or the head of a requirements department.

It is recommended that you click Yes when prompted, and send the email to the address that Meeting Room Manager automatically enters for you.



If emails are sent from the server, your email client will not open and allow you to customize the notification.

Delete a Reservation



Deletion of a reservation is permanent.

To delete a reservation:

1. Click on the reservation you wish to delete either from the grid or the results of a reservation search.
2. If the reservation you wish to delete is part of a recurring series or a multiple-resource reservation, select the appropriate option from the list when prompted:
 - **Open Single Reservation**
This opens the single instance that you have clicked on. Even if this reservation belongs to a series or a multiple resource reservation, only the selected instance is opened.
 - **Open Series**
This opens all instances of this recurring reservation. Even if the reservation is also a multiple resource reservation, only the recurrences that apply to the selected instance's resource are opened.
 - **Open Multiple Resource**
This opens the selected instance for all resources involved in the multiple resource reservation. Even if the reservation is also a recurring reservation, only the selected instance is opened for the multiple resources involved.
 - **Open Multiple Resource and Series**
This opens all instances for all resources involved in this reservation.
3. When the Reservation form opens, click the Delete button.



4. If the reservation you wish to delete is part of a recurring series or a multiple-resource reservation, select the appropriate option from the list again when prompted:
 - **Delete Reservation (same as 'Single Reservation')**

This applies to the single instance that you have open at the moment. It applies to this instance of the recurrences if there are any, and this resource only, even if the reservation is for multiple resources.
 - **Delete Series**

This applies to all instances this recurring reservation. If the reservation is a multiple resource recurring reservation, it does not apply to instances of this recurring reservation which belong to another resource.
 - **Delete All (related reservations)**

This applies to all instances of this recurring multiple resource reservation. It applies to all recurrences that belong to all resources for this reservation.
5. Click OK to confirm deletion of the reservation(s).
6. Depending upon your database's options settings and the details that were included in the reservation you deleted, you may be prompted to send a notification email to attendees or the head of a requirements department.

It is recommended that you click Yes when prompted, and send the email to the address that Meeting Room Manager automatically enters for you.



If emails are sent from the server, your email client will not open and allow you to customize the notification.

Email Reminders

As you create and host meetings that are scheduled in Meeting Room Manager, you may begin to notice email reminders being sent to you. These are in addition to the notification emails that are sent when a reservation is created or the details of a reservation are changed. Your MRM administrator, like Kate, chooses the interval that reminders are to be sent and decides who will receive them.

For example, she may choose to send out an early morning email reminder to each user which provides the list of that user's meetings for the day. Or perhaps she wants the receptionist to receive a reminder each morning that details the day's meetings

scheduled for her location. She could also arrange to remind each host an hour before his scheduled meeting. The possibilities are nearly endless.

If you would like to receive an email reminder that is not set up yet, please contact your MRM administrator.

View a Reservation's Confirmation Status

Your MRM administrator, like Kate, may choose to set up your reservation database so that reservations require confirmation by a local administrator. There are two cases that your MRM administrator can set up:


- Only reservations which have requirements selected must be confirmed
- All reservations must be confirmed


Your reservation's status is shown in the grid by its color. Select the color legend to view the colors that represent various meeting types and their confirmed and unconfirmed colors. To view the legend, click the Color Legend bar on the left side of the main screen.

Reassign a Reservation to Another User

In most organizations, staff like Charlie who simply schedule their own reservations usually do not have permissions assigned to them which would allow them to change another staff member's reservation.

If you would like to pass control of a reservation you created to another user, you can do so using the reservation reassignment feature which changes the ownership of the reservation to the other user. This gives the other user ownership of your reservation, and therefore the ability to modify the reservation.

 Keep in mind that once you have passed the ownership to the other user, you no longer have control of the reservation unless the other user passes ownership back to you.

 If a priority rights user passes his reservation's ownership to a user who does not have priority rights, the reservation is no longer a priority reservation and can be overridden by a user with priority rights. Similarly, if a user who does not have priority rights passes her reservation's ownership to a user who has priority rights, the reservation is now a priority rights reservation and cannot be overridden.

To reassign one of your reservations to another user:

1. In the day view of the reservation grid, hold the mouse over the reservation you wish to reassign. From the menu that displays, select Reassign Reservation.
2. The Reservation Reassignment form that opens and indicates the meeting title, the current owner as indicated in the Created by field, and the start and end dates and times of the meeting.

This detail is provided to allow you to confirm that the reservation you are reassigning is the one you mean to reassign.

3. From the Reassign to field, select the username whom you wish to transfer ownership to.
4. Click the OK button to save the ownership change.

CHAPTER 4 Attendees

Attendees Introduction

The Attendees tab of the Reservation form allows users to select attendees from their MRM Address Book or Outlook Address Book and send notification emails to attendees. Microsoft Outlook 2000 and higher is supported.

The Reservation form contains an Attendees tab by default. From this tab, you can access the MRM Address Book, the Outlook Address Book, the Lotus Notes Address Book, and Email Invitations. To send Outlook Invitations, refer to the “Outlook Invitations” section of this chapter.

MRM Address Book

The MRM Address Book is the address book feature that can be used if a MAPI compliant email program other than Outlook or Lotus Notes is installed, or if no address book currently exists. It is hosted by the MRM server, so this book can be accessed by any user even if they do not have an email system installed on the workstation they are using.

Modify the MRM Address Book



It is recommended that when you are editing the MRM Address Book that you do so from a blank Reservation form.

To add, edit, or delete entries manually in the MRM Address book:

1. In the Reservation form on the Attendees tab, click the MRM Addr icon.

The MRM Address Book opens.



By default, the MRM Address Book displays entries whose first names begin with the letter A. Use the letters across the top of the form to display entries beginning with other letters of the alphabet.

2. To add a new contact, click New Entry to the bottom left.
Or, to edit an existing contact, click Edit next to the contact's information.
3. The Address Detail form opens. Enter or change contact details on the General, Personal, and Notes tabs as required.
4. When you are satisfied with you're the information you have entered, click Save and Close to save the contact's details.

Delete an MRM Address Book Contact

To delete an MRM Address Book contact:

1. In the Reservation form on the Attendees tab, click the MRM Addr icon.

The MRM Address Book opens.



By default, the MRM Address Book displays entries whose first names begin with the letter A. Use the letters across the top of the form to display entries beginning with other letters of the alphabet.

2. Click 'Delete' beside the information of the contact you wish to delete.
3. A confirmation prompt displays the name of the contact you are deleting. When you are ready, click OK.

Select Attendees from the MRM Address Book

To select attendees from the MRM Address book:

1. In the Reservation form on the Attendees tab, click the MRM Addr icon.

The MRM Address Book form displays.

By default, the MRM Address Book displays entries whose first names begin with the letter A. Use the letters across the top of the form to display entries beginning with other letters of the alphabet.

2. Enter a name or partial name into the Search field and click the Search button to find all matching entries.
3. Click on a contact's name to add the individual to the attendee list.
4. Click the Close button in the MRM Address Book when complete.

Outlook Integration

Meeting Room Manager allows users to utilize some of the features in their Microsoft Outlook application in co-operation with their MRM database.

- The Outlook Address Book can be utilized to select attendees for meetings.
- Outlook Invitations can be sent to notify attendees of a meeting.
- The Meeting Change Email and Cancellation Email each contain a link which, when clicked by the recipient, automatically updates the recipient's Outlook calendar.
- Attendee Availability can be checked for those attendees sharing your exchange server.
- Basic meetings can be scheduled through Outlook.
- Meetings that were creating using Outlook can also be modified and deleted using Outlook.

Outlook Address Book

The Outlook Address Book gives you the ability to add attendees to your reservation directly from local and global address book lists.

The instructions in this section are based on Microsoft Outlook 2003. If you are using other versions of Outlook, your steps may vary.

To select attendees from your Outlook address book:

1. In the Reservation form on the Attendees tab, click the Addr Book icon.
2. When prompted to allow an ActiveX control to run, select Yes. If a Microsoft Outlook security prompt appears, ensure 'Allow access for...' is checked, and click Yes.

If you receive the prompt that states "ActiveX component can't create object," you must adjust your Active X settings before proceeding. Refer to the "Active X Control Setup" section of this chapter for details.

3. In the Outlook Distribution List that displays, click Select Members.
4. Select the contact list you wish to invite from, highlight the individual you wish to invite, and then click the Members button.
5. Repeat for each individual you wish to invite, then click OK.
6. Click Save and Close.

Back in Meeting Room Manager, the individuals you selected are displayed in the list of attendees.

Outlook Invitations

Meeting Room Manager can send an Outlook Invitation to attendees. This invitation, when accepted by the recipient, is automatically booked into the recipient's Outlook calendar. In addition, if the computer you are using is connected to a network running Microsoft Exchange Server, you can view attendee availability in the Scheduling tab of the Outlook Invitation.

The Outlook Invitations feature must be activated by your MRM administrator before it can be used in Meeting Room Manager. To create a reservation in Meeting Room Manager and send an Outlook Invitation for it through Outlook, refer to the "Outlook Interface Integration" chapter.

To check attendee availability and send an Outlook Invitation:

1. Once you have selected attendees and saved your reservation, you are prompted to send an Outlook Invitation. Click Yes.

2. When prompted to allow an ActiveX control to run, select Yes. If a Microsoft Outlook security prompt appears, ensure 'Allow access for...' is checked, and click Yes.

If you receive the prompt that states "ActiveX component can't create object," you must adjust your Active X settings before proceeding. Refer to the "Active X Control Setup" section of this chapter for details.

3. The Outlook Invitation opens.

Information for the meeting is included where appropriate, along with a summary of the meeting details in the body of the invitation.



The specifications for the Outlook Invitation including the subject and content are all set in the Options Email Messages tab.



Additional attendees can be added to the meeting by adding their email addresses to the Outlook Invitation. Meeting Room Manager automatically adds any added email addresses to the list of attendees on the Attendees Tab of your reservation.

4. Attendee availability can now be viewed by selecting the Scheduling tab.

This information is only available through Microsoft Exchange Server, and is not a function of Meeting Room Manager.

5. Turn the Outlook iCalendar feature off by clicking Tools > Options, and then unchecking the Send as iCalendar checkbox.



Turning off the iCalendar default is necessary specifically for Outlook versions 2002 (XP) and 2003 where use of the iCalendar is set to On by default.



To turn off the default setting which sends invitations as iCalendars, select Tools > Options in Outlook. On the Preferences tab, click the Calendar Options button. In the dialog that opens, under the Advanced Options section, uncheck the When sending meeting requests over the Internet, use iCalendar format option.

6. The Outlook Invitation can be sent by clicking the Send button.

If a Microsoft Outlook security prompt appears, ensure 'Allow access for...' is checked, and click Yes.

Active X Control Setup

While attempting to access your Outlook Address Book from Meeting Room Manager, if your workstation's ActiveX security control setting called "Initialize and Script ActiveX controls not marked as safe" is set to Disable, you receive the VB Script error as follows:

"ActiveX component can't create object."

To change this setting so that you may open your Outlook Address Book from intranet sites that you deem safe on a per-use bases, follow these instructions:

1. Select Tools > Internet Options.
2. On the Security tab, with Local Intranet selected, click the Custom Level button.
3. Scroll down to the ActiveX controls and plug-ins heading, and underneath the security control setting called Initialize Script ActiveX controls not marked as safe, select Prompt.

Notes Address Book

The Lotus Notes Address book can be used to enter attendees into a reservation.

To select attendees from the Lotus Notes Address Book:

1. In the Reservation form on the Attendee tab, select the Lotus Notes icon.
2. The Lotus Notes Address Book opens.
3. By default, the Lotus Notes Address Book displays entries whose first names begin with the letter A. Use the letters across the top of the form to display entries beginning with other letters of the alphabet.
4. Click on a contact's name to add the individual to the attendee list.
5. Click the Close button in the Lotus Notes Address Book when complete.

CHAPTER 5 Outlook Interface Integration

Outlook Integration

The Outlook Interface Integration feature set described in this chapter is only available in the Enterprise version of Meeting Room Manager 7.

Microsoft Outlook can be used to schedule any of the resources in your MRM database. In order to use Outlook, the MRM component must be installed on your workstation and then configured to connect to your MRM database. Talk to your network administrator or MRM administrator for details.

Once the component is in place, Outlook can be used to schedule, modify, and delete reservations. Attendee availability can be examined for those who share an Exchange server, and Outlook Invitations can be sent.



It is recommended that the latest service packs for Microsoft® Office be applied before the MRM component is installed. After the installation of the MRM component, Microsoft® Outlook should continue to be updated with the latest service packs when they come out in order for optimal compatibility with the MRM component.

Create a Reservation Using Outlook

Creating a reservation for an MRM resource in Outlook is just as simple as creating an Outlook Invitation. Create an Outlook Invitation as you normally would, then select the Meeting Room Manager tab and select the MRM resource(s) you wish to book. This tab has start and end date fields so that you can adjust the time of your meeting to suit resource availability.



Meeting Room Manager security constraints are applied to reservations created in Outlook. If you do not have permission to schedule resources in a specific location in Meeting Room Manager, the resources at that location are not available to be selected in Outlook.

To create a reservation using Microsoft Outlook:

1. In Microsoft Outlook, click New, then Appointment.
2. In the Subject field, enter the name of the reservation.
3. Select the start and end time for your reservation.



Leave the location field blank as Meeting Room Manager will auto-fill it once you have selected the resource(s) you wish to schedule.

4. Click the Meeting Room Manager tab.
5. Select the “Book rooms and resources with Meeting Room Manager” checkbox.

The status box displays briefly, and then the list of resources displays.

Resources located in all of the locations which you have permission to view are displayed on the left while hours of the day are listed horizontally. Each resource’s existing reservations are displayed in their respective time blocks.

6. If you wish to narrow the list of resources, select a location from the Location dropdown list.
7. Check the box next to the resource or resources that you wish to book.

Boxes next to resources which are unavailable for the time of your reservation are marked with an X. If you wish to adjust the time of your reservation to accommodate resource availability, do so in the start time and end time fields below the list of resources.

Selected resources are displayed in the list at the bottom of the Meeting Room Manager tab.

8. If you wish to add preparation and cleanup time, do so in the fields provided.
9. If you wish to invite attendees, click the Scheduling tab and enter attendees’ email addresses to the list. If the attendees are connected to your Microsoft Exchange server, their availability is visible.

10. Add any further details you wish to include in the reservation.



Catering and equipment requests cannot be placed from Microsoft Outlook. They must be placed using Meeting Room Manager.

11. Click Save and Close to save the reservation, or if attendees were selected, click Send to save the reservation and send the Outlook Invitation to attendees.

Edit a Reservation Using Outlook

Reservations which were created in Microsoft Outlook should be edited in Outlook in order for each attendee's schedule to be updated.

Edit any reservation as necessary. Once the changes are saved, Meeting Room Manager automatically updates the database. If the update presents a conflict with existing reservations in the MRM database, you are notified and given the opportunity to resolve the conflict before attendees are notified of your desired changes.

Delete a Reservation Using Outlook

If you wish to delete a reservation that you created using Microsoft Outlook, you should delete it in Outlook in order for each attendee's schedule to be updated.

Recurring Meetings Using Outlook

Recurrences can be scheduled using Outlook. However, being that Meeting Room Manager does not allow for reservations which recur with no end date, this option cannot be used. All other options can be used.

CHAPTER 6 Find

Find Reservations

The Find Reservations Search form is designed to allow users to quickly and easily find a specific reservation or set of recurring reservations based on specific criterion. The fields displayed for users to search by can be customized using the form designer.

To perform a search for a reservation or a set of recurring reservations:

1. Click the Meetings icon.
2. The Find Reservation Search form opens.
3. Enter your criterion into each respective search field.
 - Wildcards such as '*' and '?' can be used on their own in the search fields.
 - In Date fields, you can search for values after or before a certain date by placing '<' or '>' before the date (i.e.: '>DD/MM/YY').
 - The pop-up calendar can also be used for date fields by clicking on the calendar icon to the right of the field.
 - In Number fields, you can search for values greater than or less than a certain number by placing '<' or '>' before the number (i.e.: '>4').
 - Click on a pull-down menu to the right of a field to select from default values.
 - The Meeting Start and Meeting End fields do not operate as a range naturally. To search based on a date range, use the greater than or less than signs along with dates in the Meeting Start and Meeting End fields.

For example, to search for reservations starting December 1st, 2006 or later, enter '>12/1/2006' into the Start Time field.



Note that the manner by which the date is entered varies depending upon your workstation's regional settings. In the US, MM/DD/YYYY is commonly used, while in Canada, DD/MM/YYYY is commonly used.

4. Click Find to list all matching reservations.

Find Rooms and Resources

The Find Resources Search form is designed to allow users to quickly and easily find a particular room or group of rooms based on specific criterion. The fields displayed for users to search by can be customized using the form designer.

To find a meeting room or resource based on your criterion:

1. Click the Resources icon.
2. The Find Resources Search form opens.
3. Enter your criterion into each respective search field.
 - Wildcards such as '*' and '?' can be used on their own in the search fields.
 - In Number fields, you can search for values greater than or less than a certain number by placing '<' or '>' before the number (i.e.: '>4').
 - Click on a pull-down menu to the right of a field to select from default values.
 - The Meeting Start and Meeting End fields do not operate as a range.
4. Click Find to list all matching rooms and resources.

Apply a Location Filter

When you select a location from the Available Locations Hierarchy, only the resources assigned to the selected location are displayed in the grid. By default, each user views all locations. This filter does not affect your My Location or time zone settings.

Apply a Resource or Reservation Filter

Filters allow users to view only the specific information they want to see in the reservation grid. Existing filters can be applied or a temporary filter called a 'Custom Filter' can be applied.

To apply an existing filter:

1. Select Filters to the left of the main screen.
2. Access the appropriate Filter Dropdown by clicking its maximize arrow. Choose from the Resource Filter list or the Reservation Filter list.
3. Select the pre-defined filter you wish to apply.
4. Only the resources or reservations that match the selected filter's criterion display in the reservation grid.

Apply a Custom Filter

The Custom filter allows users to perform a customized search for resources or reservations and then temporarily apply the results of the search to the reservation grid. Only the matching resources or reservations are displayed.

The intent of this filter is to limit the vast number of filters that could accumulate if all users could save their specific filters, and to allow those users without Manage Filters permissions to see their own customized view of the reservation grid.

To apply a custom filter:

1. Select Filters to the left of the main screen.
2. From the Resource Filters or Reservation Filters pull-down menu, whichever best applies to the custom filter you are creating, select Custom Filter.
3. In the Search form that opens, enter your filter's criterion.
4. Click the Find button.
5. When you are satisfied with the results, click Apply Filter.
6. The grid refreshes, now displaying only the data that qualifies based on the custom filter you just created.
7. The custom filter will remain intact until you select another filter or log out.

CHAPTER 7 Product Feedback

Provide Product Feedback

At NetSimplicity we take pride in our customer-centric approach to product enhancement and development. As such, we place tremendous importance on the feedback from our customers. The ideas behind many of the powerful features in Meeting Room Manager as well as our other products have come directly from customers like you.

Let us know how we can improve our products. If at any time you have a suggestion to make the software better, please give us your feedback so that it can be considered for future service packs and versions of Meeting Room Manager.

To provide your feedback:

1. Click on the Online Help icon on the main screen of the Meeting Room Manager interface.
2. Select Product Feedback from the Contents list.
3. Click the link provided.

The online feedback form opens allowing you to express your product enhancement suggestions. You have the option of filling in your information on the feedback form if you don't mind having us potentially contact you for more information.

Thank you in advance for your input!

