



Meeting Room  
Manager

7

# User Training

Guide

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Third Edition, MRM 7 User Training Guide

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Written for Meeting Room Manager 7.6, Enterprise Edition

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# UNIT 1

# Getting Started

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Welcome to the NetSimplicity Users' Training Session for Meeting Room Manager 7.

This overview course familiarizes you with the interface and takes you through your day-to-day functions such as creating and modifying reservations, placing service orders, and finding the information you need.

## Training Goals

Once you have completed this training material, you will be prepared to perform the day-to-day skills required of you as an end user. You will learn:

- How to create, modify, and delete reservations.
- How to invite attendees.
- How to place a service order.
- How to find the data you are looking for.

## Assumptions

The information in this training guide is written for individuals in many different professional roles who are responsible to schedule resources within their organizations.

The instructor has been provided with the sample database which allows you to follow the exercises together. Depending upon the preferences of the instructor and the students, the exercises can either be completed by the instructor as students look on, or students can alternate taking control of the training computer and complete exercises while other students and the instructor look on.





Attention instructors: Please turn on the Inventory Check save rule in the MRMSample database before beginning the User Training. This guide assumes that this save rule is active.

## 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 the 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 Users Training Guide has been written as though all of the various features are enabled.

## Benefits of Using Meeting Room Manager

“How will this software help me?” is a very real question for professionals picking up any new software product. Meeting Room Manager will help you and your organization by providing:

- **Increased productivity** for everyone in your organization by eliminating double-booked rooms and scheduling conflicts.
- **Reduced scheduling time** as Meeting Room Manager fully automates the scheduling process. Instantly view the rooms and resources in all your locations, and reserve rooms and resources with just a few mouse clicks.
- **A simplified meeting planning process** for everyone in your organization; allow staff to quickly reserve a room, any equipment, catering, or other services, and then notify meeting attendees and service providers - all within a one-minute process!
- **Managed resource scheduling** with Meeting Room Manager's unified scheduling process. Give your entire organization room and resource schedule visibility, all the while maintaining full control of the process.

Let's start making your scheduling process faster and simpler.

## Understanding Users

While this training guide covers the functions handled by a typical user, it is helpful for users to understand how their actions affect other users.

This section describes the responsibilities of the five user types that are typically found in most organizations who use Meeting Room Manager. They are assigned to fictional staff in an organization with its head office in New York and an office in Seattle. These users' names will be referenced in this guide.

### Kate, Worldwide MRM Administrator, New York



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

- activating purchased modules
- creating security groups and assigning users to their respective groups
- setting database options
- adding locations
- customizing the forms, images, and labels in the interface
- setting up the Services Management module for use

### **Luke, Local MRM Administrator, Seattle**



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

- creating local resources in the database
- confirming meetings that have been requested or otherwise require a confirmation
- reporting usage data to local management

### **Juliette, Local Service Administrator, Seattle**



Juliette is responsible to manage services locally by using the Manage Services form. The local services management tasks include:

- setting up local service items, their availability, and their pricing
- confirming and refusing order requests

This role is dependant upon the Services Management module being enabled.

### **Charlie, User, Seattle**



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

This course is based on the tasks and responsibilities of individuals like Charlie.

### **Bob, Requesting User, Seattle**



Bob is responsible to request meetings as required through the Meeting Request form, but he cannot choose the room that the meeting will be held in.



## Run Meeting Room Manager

Meeting Room Manager is accessed through your web browser.

To run Meeting Room Manager, enter the URL that the system administrator provided to you into your browser. It is in the following format:

`"http://<Web Server>/<Virtual Directory>/`

For example:

`"http://webserver1/MRM7`

If your system administrator has chosen Windows Authentication, you will be logged into Meeting Room Manager automatically. If he or she has chosen MRM Authentication, you must log into MRM each time unless you add your username and password to your URL in the following format:

`"http://<WebServer>/<VirtualDirectory>/default.aspx?db=<database>&  
mylocation=<location>&username=<username>&password=<password>"`

For example:

`"http://webserver1/MRM7/default.aspx?db=acme&mylocation=London&  
username=Charlie&password=Paris"`

You will learn about the My Location setting and how to create usernames and passwords later on in this course.

### *Try It!*

1. Open your web browser and enter the URL that Charlie would use to log in, replacing <Web Server> with your server name:

`"http://<WebServer>/MRM7/default.aspx?db=MRMSample&mylocation=Seattle"`

2. The MRM login screen opens. Enter **Charlie** as the username and **Paris** as the password.



3. Click the **Login** button, and the MRM interface opens.

## Edit Your User Profile

The first time you log in, you may be asked to edit your user profile. You can do this again at a later time if your information changes by clicking the Edit User Profile icon at the top right of the main screen.

The screenshot shows the 'Meeting Room Manager ENTERPRISE' application window. The top navigation bar includes 'Reserve', 'Meetings', 'Resources', and 'Logoff'. On the left, there is a calendar for January 2007 and a section for 'Available Locations'. The main area is titled 'User Details' and contains a form for user information. The form includes fields for 'User Name' (Charlie), 'User Group' (Seattle Users), 'Password', 'Confirm Password', 'Full Name' (Charlie), 'Email address' (charlie@acme.com), and 'Set user default location' (Seattle). There are 'OK' and 'Cancel' buttons at the bottom. On the right side of the form, there are two informational messages: one about editing the account and another about downloading MRM-Outlook integration.

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
4	5	6	7	8	9	10

Today: 1/22/2007

Available Locations

Set Current Location

Filters

Color Legend

User Details

User Name:

User Group:

Password:

Confirm Password:

Full Name:

Email address:

Set user default location:

OK Cancel

Edit your account anytime by clicking the Edit User Profile icon at the top right of the main page.

Download MRM-Outlook Integration

MRM-Outlook Integration is an add-in program for Microsoft Outlook that allows you to book rooms using Microsoft Outlook 2000, 2002, 2003.

## User Licenses

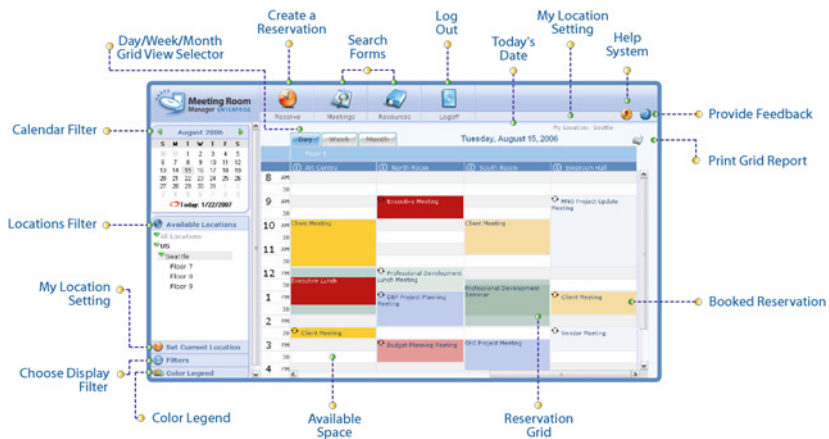
Meeting Room Manager controls the number of users that can be logged into your database based on the number of concurrent licenses that have been purchased.

A concurrent user license is in use once a user logs in. When a user clicks the Log Out button or the session times out, the concurrent license is released for use by another user.

The 'No Concurrent User Licenses Available' message displays once all licenses are in use. This can be avoided if everyone uses their own username to log in and everyone logs out when finished using Meeting Room Manager.

### The MRM Interface

Let's 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 reservations. Click the available space below the resource you wish to book and 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. We will create reservations later on in this training guide.

### Booked Reservation

Booked reservation spaces display various details of the reservation based on settings determined by administrators like Kate. Meeting Title is most often used, but some other details can be shown as well, such as 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.

### *Try It!*

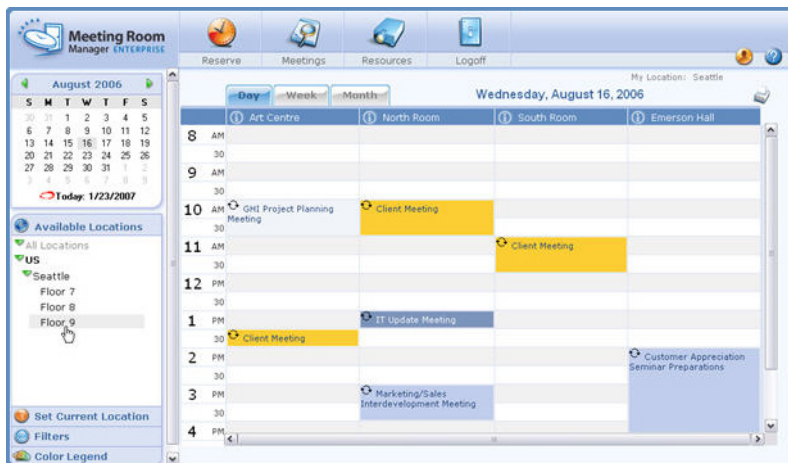
Now that you are signed in as Charlie, click **next Tuesday's date** in the calendar to see the existing reservations for that date.

## Locations Filter

The locations filter allows you to filter the locations viewed in 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 at that location in the grid. To view all resources, click All Locations.

### *Try It!*

Charlie is located in the Seattle office on the 9th floor. Click **US**, then **Seattle**, then **Floor 9** to view reservations in his area.



My Location Setting

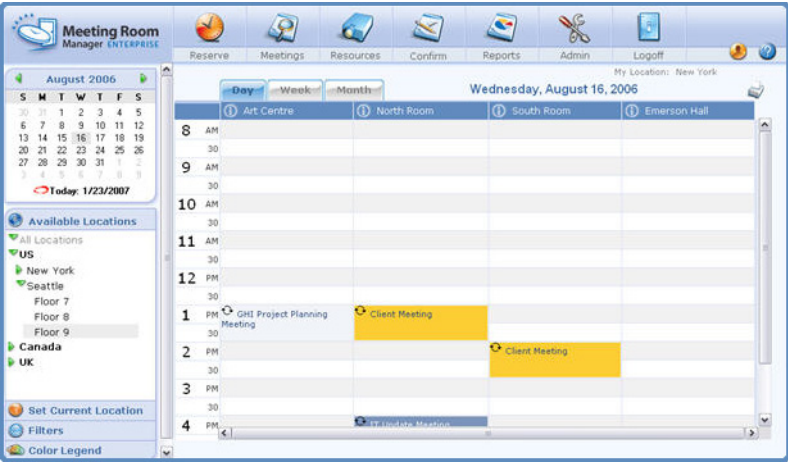
The My Location setting allows you to set the location and therefore the time zone which you are currently in. All time references for meeting start and end times are based on your time zone.

Note that this setting is forgotten the next time you log in. You can set your default location by editing your location setting in your user profile.

Always ensure that your current location is correct so that reservations display their times in your time zone.

In the screenshot below, the user’s my location setting is set to New York time, but the user is viewing the same day and location as user Charlie did in the screenshot on the last page.

Notice that the reservations appear to be scheduled for three hours later than in the previous screenshot. This is because the time zone for the New York setting is set to Eastern time, three hours later than Pacific time in Seattle.

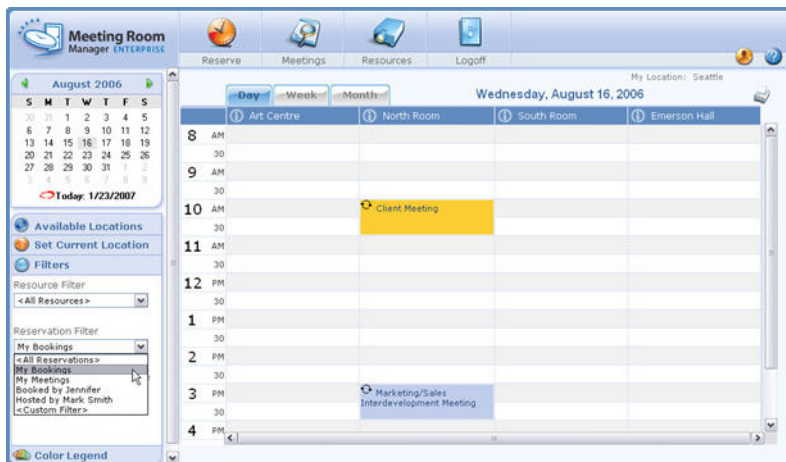


## Choose Display Filter

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.

### *Try It!*

Select the display filter called **My Bookings**. Notice that any meetings booked by other users disappear from view.



Change the filter back to display all reservations by selecting **<All Reservations>**.

## Color Legend

Reservations in the grid are color coded to match their reservation type. This legend describes the color codes you see in the reservation grid so that you know which color belongs to which reservation type.

### Day / Week / Month Grid View Selector

Reservations can be viewed in four different views: day, week, month, or timeline view. Administrators like Kate can make each of these views available or hidden for users like Charlie. The first three are the most commonly used, and so they have been made available in the training database. Select the tab to see the corresponding view.

### *Try It!*

Click on the **Week** tab to view all reservations for rooms on the 9th floor this week.

Click on the **Month** tab to view all reservations for rooms on the 9th floor this month.

Return to the Day view by clicking the **Day** tab.

### Create a Reservation

Clicking the Reserve icon is a 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.

### Log Off

Every user must click this Log Off icon to exit Meeting Room Manager. If a user closes his browser window without clicking the Log Off icon, the IIS session timeout releases his concurrent user license once his inactive time runs out. By default, the time between inactivity and timeout is 20 minutes. However, MRM administrators like Kate can adjust this time.

### 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.



### **Help System**

Clicking this icon opens the online help system.

### **Print Grid Report**

The Print Grid Report icon opens the day/week/month view report's options.

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### Unit Summary

In this unit you have learned:

- The benefits of using Meeting Room Manager
- The five most common roles of MRM users
- How to run and log into MRM
- How to edit your personal user profile
- How concurrent licenses operate
- How to navigate the MRM interface

You are now ready to begin scheduling reservations!

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## UNIT 2

## Creating Reservations

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### Create a Reservation

Users like Charlie regularly need to schedule meetings in the available rooms at their respective locations. There are three ways to schedule a reservation:

- ✓ From the day view of the reservation grid
- ✓ From the week or month view of the reservation grid
- ✓ By clicking the Reserve icon.

### Reserve in the Day View

#### *Try It!*

Signed in as the user Charlie, schedule a basic sales meeting for next Thursday:

1. In the calendar on the main screen, select **next Thursday's date**.
2. In the Available Locations hierarchy, select your location to display its resources in the grid.

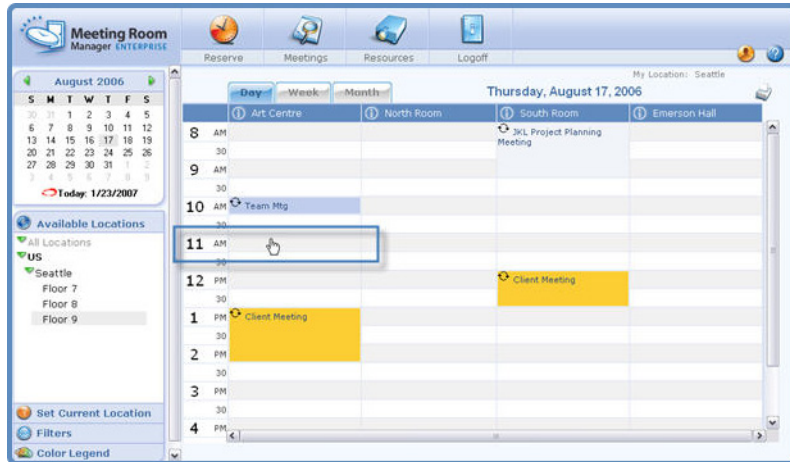
For this exercise, select Charlie's location, US/Seattle/**9th Floor**.

3. Click on the **Day** tab in the reservation grid to reveal the day view.



- Click on the time of your meeting under the resource you wish to use to open the Reservation form with these details already entered.

For this exercise, select the **11:00AM** under the **Art Center**.



In the Reservation form that opens, notice that next Thursday's date and the Art Center are already selected for you.

The start time is 11:00AM as you specified, and the end time is half an hour later. This half hour is based on your reservation grid's interval time which is 30 minutes by default.

The screenshot shows the 'Meeting Room Manager Enterprise' application. The 'Reservation Details' window is open, displaying a reservation for August 17, 2006, from 11:00:00 AM to 11:30:00 AM. The reservation is for the 'Art Centre (Floor 9/Seattle/US)'. The 'General' tab is selected, showing fields for Meeting Title, Reservation Type, Host, Client Name, Booked By, #Attending, and Client Code. The 'Prep Time' and 'Cleanup Time' fields are set to 0.

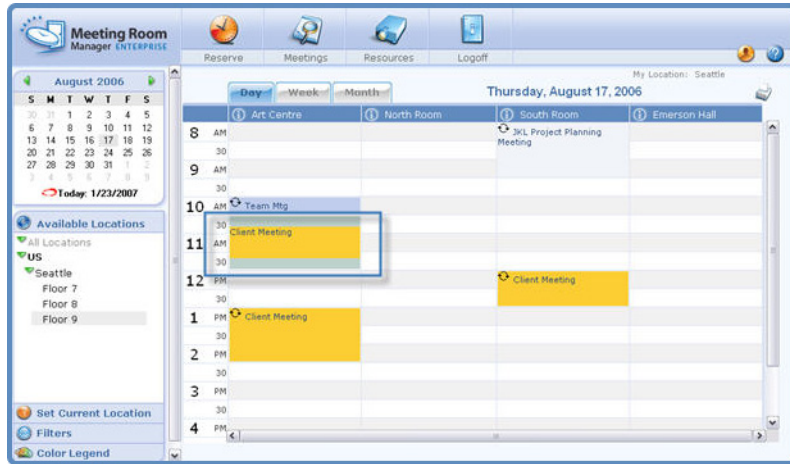
5. In the Prep and Cleanup Time fields, time may be scheduled outside the reservation to allow for preparation of the meeting room as well as cleanup after the meeting is finished.

For this exercise, enter **10** minutes for each.

6. Enter the following details into each field on the General tab:

- ✓ Meeting Title: Client Meeting
- ✓ Reservation Type: Client Meeting
- ✓ Host: Charlie
- ✓ Client Name: Acme Corp
- ✓ Booked By: Charlie
- ✓ #Attending: 4
- ✓ Client Code: 53889-AC

- Click the **Save and Close** button to save your new reservation and return to the reservation grid. Notice that the reservation you just created is now visible in the grid.



### *On Your Own!*

Schedule two more reservations from the day view. Enter the details as follows:

- Schedule a **Client Meeting next Thursday** from **9:00AM to 9:30AM** in the **North Room**.
  - ✓ Meeting Title: Client Meeting
  - ✓ Reservation Type: Client Meeting
  - ✓ Host: Charlie
  - ✓ Client Name: Jasper Restoration
  - ✓ Booked By: Charlie
  - ✓ #Attending: 4
  - ✓ Client Code: 53224-JR
- Schedule a **Client Meeting next Thursday** from **9:30AM to 10:00AM** in the **North Room**.

- ✓ Meeting Title: Client Meeting
- ✓ Reservation Type: Client Meeting
- ✓ Host: Charlie
- ✓ Client Name: Harrison Gate Inc.
- ✓ Booked By: Charlie
- ✓ #Attending: 6
- ✓ Client Code: 53415-HG

## Reserve in the Week or Month View

### *Try It!*

Signed in as the user Charlie, schedule another basic sales meeting for next Thursday on behalf of Karen from the IT Department:

1. On the main screen, click on the Week or Month tab to reveal the respective reservation grid view.

For this exercise, click the **Month** tab.

2. Find **next Thursday's date** and click the **Add** button beside it.  
The Reservation form opens with next Thursday's date selected.

3. In the Start Time and End Time fields, enter **9:00AM** and **10:00AM**.

4. In the Resources area, select the **Art Center**.



Notice that different tabs are revealed depending upon the resource you select in the Reservation form. This is because tabs are available based on the location in which the resource is situated. Your MRM administrator can change which tabs are available for each location by following the instructions in the Administrators Guide.

5. On the General Tab, fill in each field as follows:

- ✓ Meeting Title: Maintenance Planning
- ✓ Reservation Type: Professional Dev
- ✓ Host: Karen

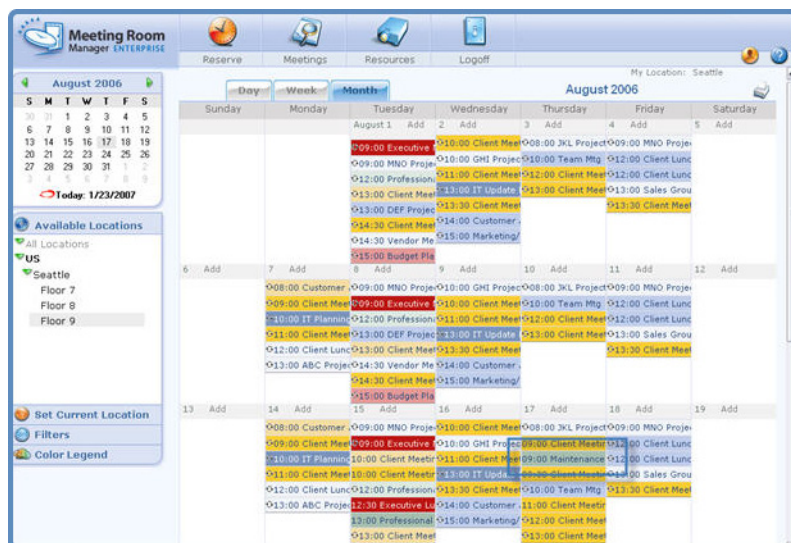


✓ Booked By: Charlie

✓ #Attending: 5

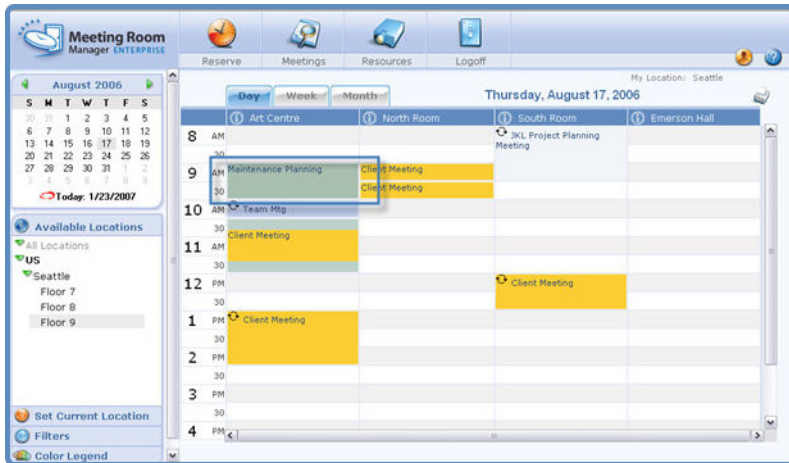
6. Click the **Save and Close** button to save your new reservation and return to the reservation grid.

Notice that this new reservation is now visible in the Month view of the reservation grid below next Thursday's date.





7. Switch to the **Day view** to see the time and room for your reservation in the grid.



### *On Your Own!*

Schedule a reservation from the **Week view** for **next Thursday** in **Emerson Hall** from **8:00AM to 9:30AM** with the following details:

- ✓ Meeting Title: Client Appreciation Breakfast
- ✓ Reservation Type: Client Meeting
- ✓ Host: Charlie
- ✓ Booked By: Charlie
- ✓ Client Name: Harrison Gate Inc.
- ✓ #Attending: 25
- ✓ Client Code: 53415-HG

### Reserve Using the Reserve Icon

#### *Try It!*

Signed in as the user Charlie, schedule another basic sales meeting for next Thursday:

1. On the main screen, click the **Reserve** icon.
2. In the Reservation form that opens, enter **next Thursday's date** in the Start and End Date fields.
3. In the Start Time and End Time fields, enter **12:00PM** and **12:30PM**
4. Check the box beside the resource that you wish to select for this reservation.  
For this exercise, select the **Art Center**.
5. Once you have selected the resource, the reservation details section of the Reservation form refreshes to display the tabs in which reservation details can be entered.

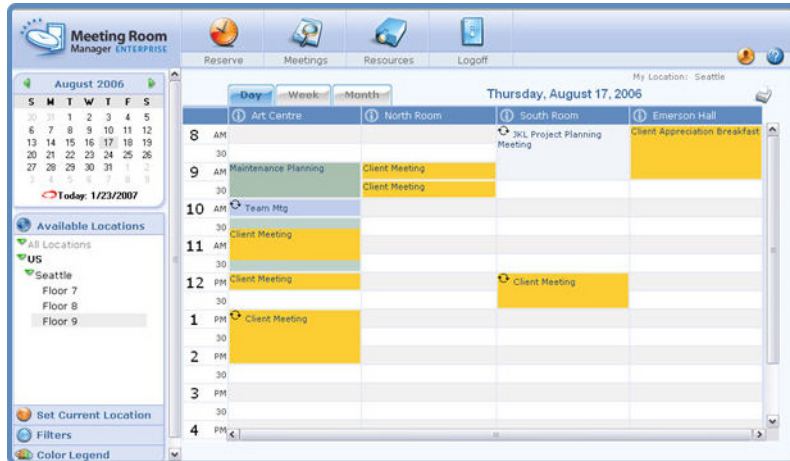
Enter the reservation details into each available field on the Reservation form. Click on a tab to reveal the fields on it.

For this exercise, on the **General Tab**, fill in each field as follows:

- ✓ Meeting Title: Client Meeting
- ✓ Reservation Type: Client Meeting
- ✓ Host: Charlie
- ✓ Client Name: Roger Johnson & Associates
- ✓ Booked By: Charlie
- ✓ #Attending: 2
- ✓ Client Code: 53854-RJ

- Click the **Save and Close** button to save your new reservation and return to the reservation grid.

In the reservation grid, you can see each of the reservations you just created. The Day view shows which resources the meetings are scheduled in and the preparation and cleanup time scheduled for the 11:00AM client meeting.



## Recurring Reservations

Some reservations, such as staff meetings, repeat at regular or random intervals. As long as the meeting takes place in the same resource at the same time of day, these recurrences can be scheduled all at once.

### *Try It!*

Signed in as Charlie, schedule a weekly sales department meeting for every Thursday afternoon starting next Thursday:

- Using one of the three methods we just learned to schedule a reservation, open the reservation form:
  - Click on a time under a resource in the day view, or
  - Click the Add button in the week or month view, or

- Click the Reserve icon.
2. Select **any room in the Seattle/9th Floor location**.
  3. Select **next Thursday** for the date, and **1:00PM to 2:00 PM** for the start and end times.
  4. Click the **Recurrence** checkbox to open the Recurrence dialog box.

RecurrenceForm - Microsoft Internet Explorer

### Set Recurrence

**Daily** Weekly Monthly Yearly Random

Daily Recurrence Setup

Every  day(s) ☒ Include weekends

Click 'Next' to go to random tab with selected dates generated.

☒ End After  Occurrences

☐ End By

Next

OK Cancel

There are five tabs in the Recurrence dialog box:

### Daily

Every [1] Day(s)

Change the number to specify the frequency of the occurrence.

Select or de-select the Include Weekends checkbox.

**Weekly**

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

Change the number to specify the frequency.

Select the day(s) of the week for the recurrence.

**Monthly**

The [1] [Day] of every [1] Month(s)

Two examples are the first Monday of every two months, or the seventeenth day of every one month. 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.

**Random**

Any dates from the calendar can be selected. They are displayed in the box to the right. Selecting a displayed date removes it.



For this exercise, select the **Weekly** tab and enter **Every 1 Weeks on Thursday**.

RecurrenceForm - Microsoft Internet Explorer

### Set Recurrence

**Daily** **Weekly** Monthly Yearly Random

Weekly Recurrence Setup

Every  week(s) on

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday

☒ Thursday ☐ Friday ☐ Saturday

Click 'Next' to go to random tab with selected dates generated.

☒ End After  Occurrences

☐ End By

Next

OK Cancel

5. At the bottom of the Recurrence dialog box are two fields. Either the number of occurrences or the date at which the occurrences are to end can be entered.

For this exercise, select **end after 5 recurrences**.

6. Click the **Next** button. This displays the Random tab in which each recurrence is listed
7. Click **OK** to return to the Reservation form and save your selections.
8. On the General tab, fill in each field with whatever information you wish.
9. Click the **Save and Close** button to save your new reservation and return to the reservation grid.

In the reservation grid, you can now see the five recurring reservations you just created. The screen capture below shows three of these five recurring reservations in the Month view.

## *On Your Own!*

Schedule two more recurring reservations.

1. Create a reservation for **next Friday** from **10:00AM to 11:00AM** in the **North Room** and set the recurrences to whichever settings you'd like.
2. Create a reservation for **next Friday** from **10:00AM to 11:00AM** in **Emerson Hall** and set the recurrences to whichever settings you'd like.

## **Find Available Resources**

Especially in large organizations with many rooms and resources, it is helpful to be able to search for meeting rooms that not only match your requirements, but are available for your meeting and its recurrences. This can be done directly in the Reservation form.

## *Try It!*

Signed in as Charlie, schedule a weekly meeting for the salespeople:

1. Using what you've learned, open the Reservation form and enter the information so that this meeting will start **next Friday** from **3:00PM to 4:00PM** and **recur every Friday for 8 weeks**. Remember not to select a room yet.

2. Now you're ready to find a suitable and available room. Click the **Find Available Resources** icon to the right of the resource area of the form.

The screenshot displays the 'Meeting Room Manager' software interface. The top navigation bar includes 'Reserve', 'Meetings', 'Resources', and 'Logoff'. The left sidebar contains a calendar for August 2006, a list of 'Available Locations' (All Locations, US, Seattle, Floor 7, Floor 8, Floor 9), and buttons for 'Set Current Location', 'Filters', and 'Color Legend'. The main area is titled 'Reservation Details' and contains the following fields:

- Start:** 8/18/2006, 3:00:00 PM
- End:** 8/18/2006, 4:00:00 PM
- ☐ All Day Event
- ☒ Recurrence
- Prep Time:** 0
- Cleanup Time:** 0
- Resources:**
  - ☐ Art Centre (Floor 9/Seattle/US)
  - ☐ North Room (Floor 9/Seattle/US)
  - ☐ South Room (Floor 9/Seattle/US)
- Recurrence:** Occurs every week on Friday for 8 occurrences.
- General Section:**
  - Meeting Title:** [Text Field]
  - Reservation Type:** [Dropdown]
  - Host:** [Text Field]
  - Client Name:** [Text Field]
  - Booked By:** Charlie
  - #Attending:** 0
  - Client Code:** [Text Field]

Buttons at the bottom include 'Assign Color', 'Save and Close', and 'Cancel'.



3. In the Resource Search form, add criterion to perform a search.

For this exercise, select US/Seattle/**9th Floor**, and max capacity >**10**. Then click the **Find** button.

FindResource - Microsoft Internet Explorer

### Find Resources

Location:

Resource Name:

Cost Center:

Contact Person:

Hourly Rate:  Max. Capacity:

☐ Television  
☐ DVD  
☐ Overhead Projector  
☐ Projection Screen  
☐ Supports Catering Orders

Meeting Start: 8/18/2006 3:00  
 Meeting End: 8/18/2006 4:00

Picture	Floorplan	Resource Name	Location	Cost Center	Contact Person	Hourly Rate	Max. Capacity	Telephone
---------	-----------	---------------	----------	-------------	----------------	-------------	---------------	-----------

4. From the list of matching resources that displays, select the box beside **South Room**. Then click the **Select** button.
5. The Reservation form refreshes to display the South Room selected. Enter the remaining reservation details on the General tab.
6. Click the **Save and Close** button to save your new reservation and return to the reservation grid.

In the day view of the reservation grid, select next Friday's date. Notice that the reservation you just created is displayed.

## Multiple Resource Reservations

A multiple resource reservation is a reservation for which multiple resources or rooms are booked. Any grouping of resources can be selected for a single reservation, regardless of the resource's location or resource type. However, the user must have the Add/Edit Reservations permission enabled for the location each room belongs to. To make your

reservation a multiple resource reservation, in the Reservation form simply check the box next to the various resources you wish to book.

Once a multiple resource reservation is saved, each resource's occurrence is considered to be connected to the original reservation. However, 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.

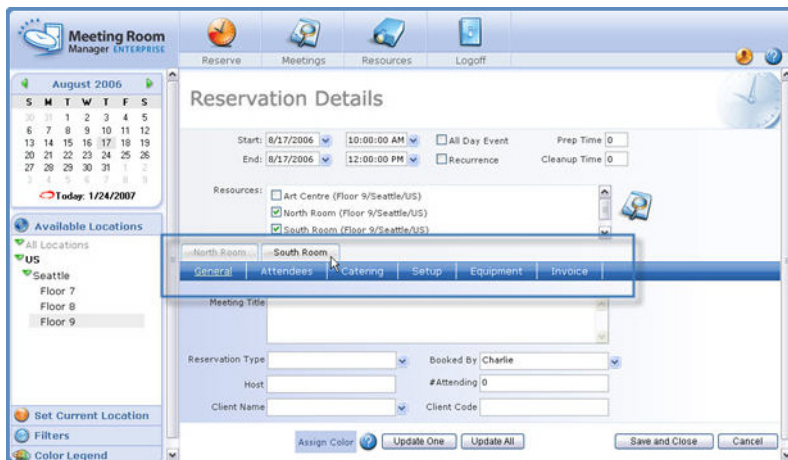
### *Try It!*

Signed in as Charlie, create a reservation for the North and South rooms:

1. Using what you've learned, open the Reservation form and enter the information so that the meeting is held from **10:00AM to 12:00 PM next Thursday**.
2. Select the boxes beside both the **North Room** and **South Room**.

There is now a row of tabs above the reservation details tabs which lists each of the selected resources.

3. 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.



4. Now you have two options: you can either make the details the same for both resources, or save different details for each resource.

- **Same Reservation Details**

To ensure that the reservation's details are the same for each resource's occurrence of the booking, select only one resource first. Then add all of the reservation's details to the available tabs. Finally, check the boxes next to the additional resources.

Notice that information saved in the first resource's details now displays in the details assigned to each of the additional resources. Any changes that are made after a reservation has been turned into a multiple resource booking, in other words, once more than one resource has been selected, apply only to the currently selected resource.

- **Different Reservation Details**

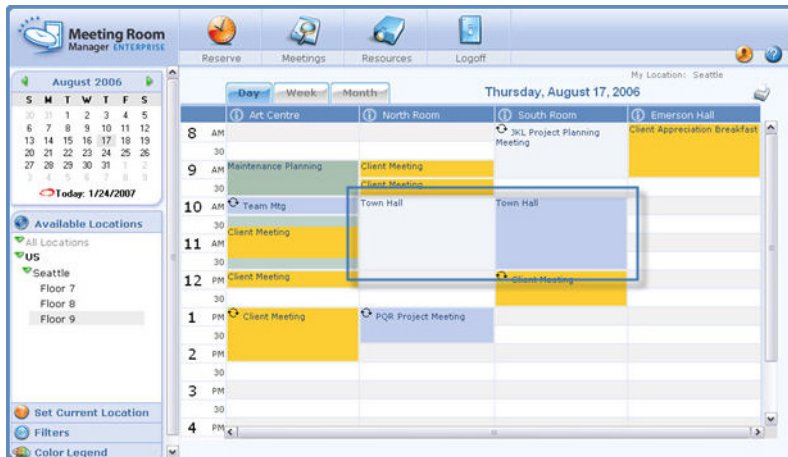
To keep separate details for each resource's occurrence of the booking, check the box beside each resource first. Then, once all resources have been selected, make your changes.

For this exercise, enter the meeting title as **Town Hall** for both rooms, and check the **projector screen** under the **Equipment tab** only for the **North Room**. This means that only one projector screen is ordered for this reservation. If you had selected the projector screen for both rooms, then two projector screens would be ordered for the one meeting.



5. Click the **Save and Close** button to save your new reservation and return to the reservation grid.

In the reservation grid, you can see the two instances of the Town Hall meeting under the North Room and South Room.



Notice that the North Room's reservation displays the unconfirmed color because requirements were selected. When saving a multiple resource reservation with requirements, the requirements selected are saved for each resource. If your MRM Administrator, like Kate, requires meetings like this one to be confirmed, each resource's occurrence of the reservation displays in the Meeting Confirmation form.

### Attendees Tab

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. From this tab, you can access the MRM Address Book, the Outlook Address Book, the Lotus Notes Address Book, and Email Invitations.

The screenshot displays the Meeting Room Manager (MRM) software interface. On the left, there is a calendar for August 2006 and a list of available locations: All Locations, US, Seattle, Floor 7, Floor 8, and Floor 9. The main window is titled 'Reservation Details' and contains several tabs: General, Attendees, Catering, Setup, Equipment, and Invoice. The 'Attendees' tab is currently selected, showing a table with columns for Name, Email, and Work Phone. The 'Reservation Details' form includes fields for Start (8/17/2006, 8:00:00 AM), End (8/17/2006, 6:00:00 PM), All Day Event, Recurrence, Prep Time, and Cleanup Time. Resources listed include Art Centre (Floor 9/Seattle/US), North Room (Floor 9/Seattle/US), and South Room (Floor 9/Seattle/US). The bottom of the window has buttons for Assign Color, Save and Close, and Cancel.

## MRM Address Book

The MRM Address Book is the address book feature that can be used in any situation. Some organizations may choose to use the MRM Address Book 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

The MRM Address Book can be modified at any time by users in a group which has the Modify Value Lists permission enabled. It is recommended that the MRM Address Book is edited from within a blank Reservation form.

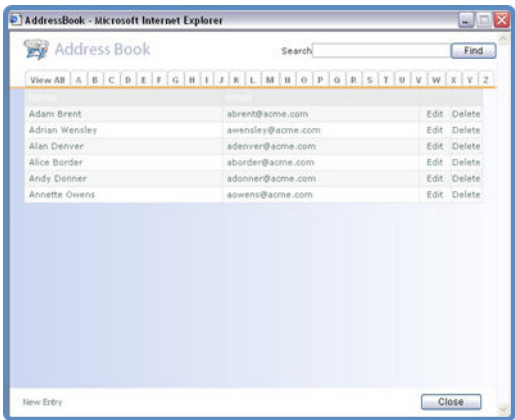
## Try It!

Signed in as Charlie, modify the MRM Address Book:

1. In the Reservation form, select the Attendees tab and 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 to the address book, click the **New Entry** button. Then in the Contact Information form that opens, enter the new contact's details.

For this exercise, enter the following details:

- ✓ Name: Calvin Kestein
- ✓ Email: ckestein@contact.com
- ✓ Job Title: Manager
- ✓ Company: Contact Corp

✓ Work Phone: 555-555-5525

Save Calvin Keststein's information and return to the MRM Address Book by clicking the **Save and Close** button.

3. To edit an existing contact, click the Edit button next to the contact's information.

For this exercise, click the **Edit** button beside the contact named **Andy Donner**.

His phone number has changed. Enter his new phone number as **555-555-4524**.

Click the **Save and Close** button to save Andy Donner's new information and return to the MRM Address Book.

4. To delete an existing contact, click the Delete button next to the contact's information.

For this exercise, click the **B** tab to display contacts whose name starts with the letter B. Then click the **Delete** button beside the contact named **Beverly Jacobs**.

A confirmation prompt displays the name of the contact you are deleting. When you are ready to delete the contact, click **OK**.

5. Click the **Close** button to exit the MRM Address Book.

### Add Attendees to a Reservation

Attendees can be added to a reservation from either the Outlook Address Book, Lotus Notes Address Book, or MRM Address Book. Users can also add attendees to a reservation by simply typing the attendee's contact information into the Attendee tab.

#### *Try It!*

Because different organizations use different email clients, this course covers use of the MRM Address Book. Signed in as Charlie, create a reservation for **next Thursday** from **2:00PM to 3:00PM** in the **North Room** and add attendees:

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. Click on the letter **D** to reveal the contacts whose first name begins with the letter D.
3. Click on **Diana Jordan**'s name to add her to the attendees list.
4. Click the **Close** button in the MRM Address Book to return to the Reservation form.



5. In the Reservation form, add an additional attendee by typing her contact information into the attendees list.

For this exercise, enter **Kathleen Laurentien**, whose email address is **klaurentien@contact.com** and phone number is **555-645-8827**.

6. Click the **Save and Close** button to save your new reservation and return to the reservation grid.

In the day view of the reservation grid, click on next Thursdays' date to see the reservation you just created.

## Requirements Tabs on the Reservation form

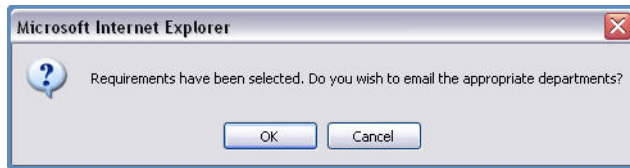
Depending upon the amount of form design that Kate has done on the Reservation form, Charlie has various tabs in which to enter requirements for his meetings.

### *Try It!*

Signed in as Charlie, create a reservation with details on the Setup and Equipment tabs:

1. Using what you've learned, open the Reservation form and enter the information so that the meeting is called **Client Meeting** and is held from **10:00AM to 11:00 AM next Thursday in Emerson Hall**.

2. Click the **Setup** tab. Then check the box beside the **Conference** seating setup.
3. Click the **Equipment** tab. Then check the box beside the **flip chart**.
4. Click the **Save and Close** button to save your new reservation and return to the reservation grid.
5. Meeting Room Manager prompts to say that requirements have been selected and asks you to send the Notification Email. Either click OK to notify departments or Cancel to not send the email.



There are two scenarios in which you may not see this message:

- If emails are all sent from the server.
- If your MRM Administrator has turned off this email.

For this exercise, click **OK**.

6. The workstation's default email program opens the Notification Email. It can be modified as necessary, and then sent to the intended recipient.



Notice that there is no email address in the To line. This is because the default recipient has not yet been set by the MRM Administrator like Kate.

In Meeting Room Manager, you are returned to the reservation grid. In the day view, click on next Thursdays' date to see the reservation you just created.

### 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 quantities. Only items that you selected which your MRM Administrator has set as requirements are added to the Invoice tab.

By default, the invoice tab is a locked tab, which means that unless you have Modify Locked Tabs permissions, you cannot modify data on the tab. If you need to update an item's quantity, do so on the tab where you selected the item. Items with checkboxes can only have a quantity of one unless an administrator modifies the quantity for you on the Invoice tab.

## Try It!

Signed in as Charlie, create a meeting with requirements and check the invoice tab:

1. Using what you've learned, open the Reservation form and enter the information so that the meeting is called **Client Meeting** and is held from **12:00PM to 1:00PM next Thursday in Emerson Hall** with a **speaker phone** selected.
2. Click on the Invoice tab. The white board which you selected is listed in the Invoice tab at the dollar amount that was set by the MRM Administrator like Kate.

Notice that this tab is locked and cannot be modified. This is because you are logged in as Charlie who does not have permission to modify locked tabs. If anything on the invoice tab must be modified, any administrator such as Luke the local administrator can make the modifications.

The screenshot shows the Meeting Room Manager software interface. On the left is a sidebar with a calendar for August 2006, a list of available locations (All Locations, US, Seattle, Floor 7, Floor 8, Floor 9), and buttons for Set Current Location, Filters, and Color Legend. The main window is titled 'Reservation Details' and has tabs for Reserve, Meetings, Resources, and Logoff. The form contains fields for Start (8/17/2006 12:00:00 PM), End (8/17/2006 1:00:00 PM), All Day Event, Recurrence, Prep Time, and Cleanup Time. Under Resources, there are checkboxes for Art Centre (Floor 9/Seattle/US), North Room (Floor 9/Seattle/US), and South Room (Floor 9/Seattle/US). The 'Emerson Hall' tab is selected. Below this is a tabbed interface with General, Attendees, Catering, Setup, Equipment, and Invoice. The 'Invoice' tab is active, showing a table with columns: Invoice#, Date, Item, Qty, Each, and Price. The table contains one row: 'Speaker Phone' with Qty 1, Each \$5.00, and Price \$5.00. The total is \$5.00. There are buttons for Assign Color, Save and Close, and Cancel.

3. Click the **Save and Close** button to save your new reservation and return to the reservation grid.
4. Meeting Room Manager prompts you to send the Notification Email.  
For this exercise, click **OK**.
5. The workstation's default email program opens the Notification Email. It can be modified as necessary, and then sent to the intended recipient.  
In Meeting Room Manager, you are returned to the reservation grid.

### Request Services

When the Services Management module has been purchased and set up by the MRM administrator, users with the rights to reserve service items, like Charlie, can request services for their meetings.

#### *Try It!*

Signed in as Charlie, schedule a lunch meeting with a customer:

1. Using what you've learned, open the Reservation form and enter the information so that the meeting is called **Breakfast Meeting**, held from **8:00AM** to **9:30AM next Friday** in the **South Room**.
2. Click the **Catering** tab.
3. Click on the **Breakfast Baked Goods** category in the menu, then the **Muffins** subcategory.
4. Hover your mouse over the item **Blueberry** to reveal its details and price. Click on it to add it to your menu.  
The Catering tab refreshes to display the item in the catering order on the right.
5. The default quantity is one. Highlight the number, and enter the number **4**. Then click the **Refresh Grid** button to refresh your order's total cost.

6. Using what you've just learned, add some more items of your choice to the order.

**Meeting Room Manager ENTERPRISE**

Reserve Meetings Resources Logoff

**Reservation Details**

Start: 8/18/2006 8:00:00 AM ☐ All Day Event Prep Time: 0  
 End: 8/18/2006 9:30:00 AM ☐ Recurrence Cleanup Time: 0

Resources: ☐ Art Centre (Floor 9/Seattle/US) ☐ North Room (Floor 9/Seattle/US) ☒ South Room (Floor 9/Seattle/US)

**South Room**

General Attendees **Catering** Setup Equipment Invoice

Select items Order details Refresh grid Delete all

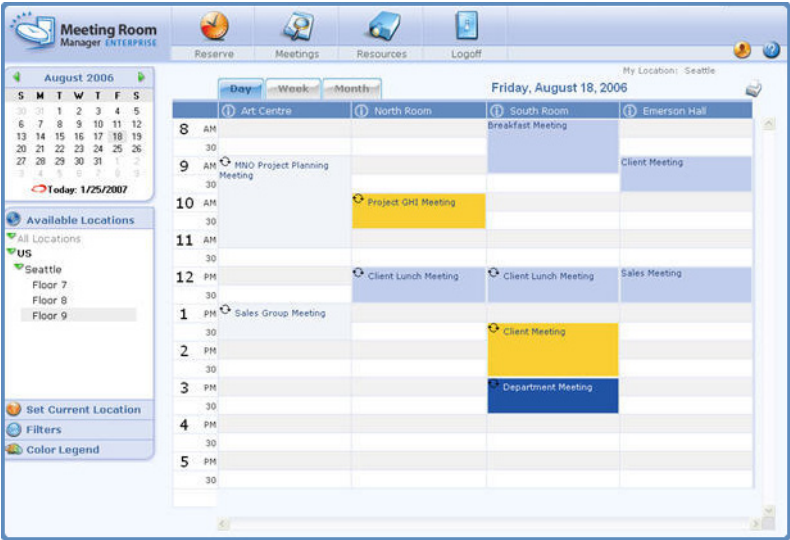
Item Name	Time	Qty	Unit Price	Amount
Blueberry	8:00:00 AM	4	\$2.50	\$10.00
Bran	8:00:00 AM	2	\$2.50	\$5.00
Cranberry Orange Scone	8:00:00 AM	2	\$1.25	\$2.50
Cheese Scone	8:00:00 AM	2	\$1.25	\$2.50
Bottled Water	8:00:00 AM	10	\$1.50	\$15.00
Green Tea Lemonade	8:00:00 AM	10	\$1.50	\$15.00
Apple Juice	8:00:00 AM	10	\$1.50	\$15.00
<b>Total Order</b>				<b>\$50.00</b>

Assign Color Save and Close Cancel

7. Click the **Save and Close** button to save the reservation and its catering order.
8. You are returned to the reservation grid. Invisible to users, Meeting Room Manager sends the Order Notification email to the local service administrator like Juliette.

## On Your Own!

It's time to practice what you've learned. Create two meetings for next Thursday or Friday which are located in the **Emerson Hall** and include service orders. Name one **Client Meeting** and the other **Sales Meeting**.



## 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:

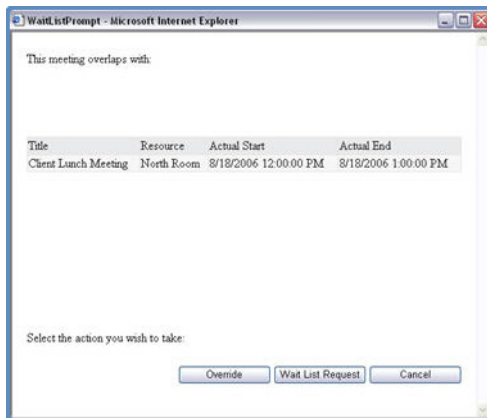
Executive Meeting 12/5/2005 9:00:00 AM ~ 12/5/2005 10:00:00 AM"

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:

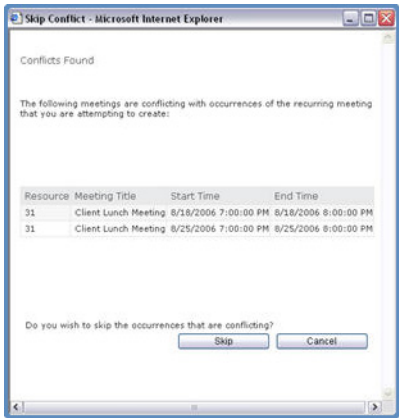
“Conflicts Found.

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.
- If you wish to change the selected resource in order to avoid conflicts.

*Try It!*

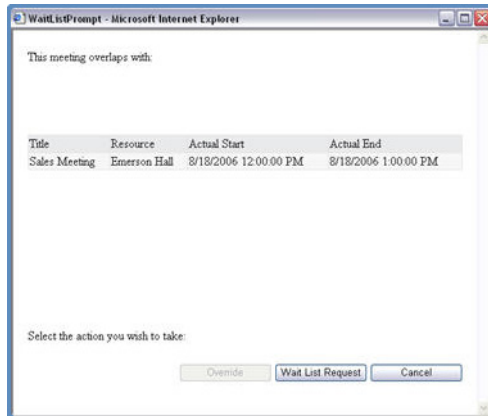
Signed in as Charlie, schedule a meeting for the same room, time, and date as another meeting you created:

1. Click the Reserve icon.
2. Set the start time to **12:00PM next Thursday** and the end time to **1:00PM**.
3. Select **Emerson Hall**.
4. In the meeting title field, enter **New Meeting**.
5. Click the **Save and Close** button.

6. Because this meeting conflicts with the Client Meeting you scheduled in the Invoice Tab section of this chapter, you receive the single reservation conflict message. It should read similarly to the following:

“Cannot Save. This meeting overlaps with meeting:

Client Meeting 3/16/2006 12:00:00 PM ~ 3/16/2006 1:00:00 PM”



7. You are given the option to create a wait list entry or to cancel and return to the reservation form. Notice that because you are signed in as Charlie who does not have priority rights, he is not given the option to override the meeting.

Click the **Cancel** button.

8. You are returned to the Reservation form. Change the time for the reservation to **11:00AM to 12:00PM**.
9. Click the **Save and Close** button.

Because there is no longer a conflict, the reservation saves and closes and is now visible in the reservation grid.

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## Unit Summary

In this unit you have learned:

- How to create reservations
- How recurring reservations work
- How to find available resources
- How multiple resource reservations work
- How to utilize the Attendees tab
- How to select requirements for your meeting
- How to utilize the Invoice tab
- How to request services

Now you are ready to learn more detail about reservations!

---



### Edit a Reservation in Meeting Room Manager

Reservations can be edited at any time.



It is very important to note that when a reservation with multiple resources is saved, separate reservations are created for each of the selected rooms.

#### *Try It!*

Signed in as Charlie, open an existing reservation to change some of its details:

1. Click on the title of the reservation in the grid or in the meeting search form.

For this exercise, open the **Client Meeting** held **next Thursday** in the **Art Center** from **12:00 PM to 12:30 PM** by clicking on its title in the **day view** of the reservation grid.

2. If prompted, select which option you wish to perform:

- **Open Single Reservation**

This opens the single instance that you have clicked on. 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. If the reservation is also a multiple resource reservation, only the recurrences that apply to the selected instance's resource are opened.

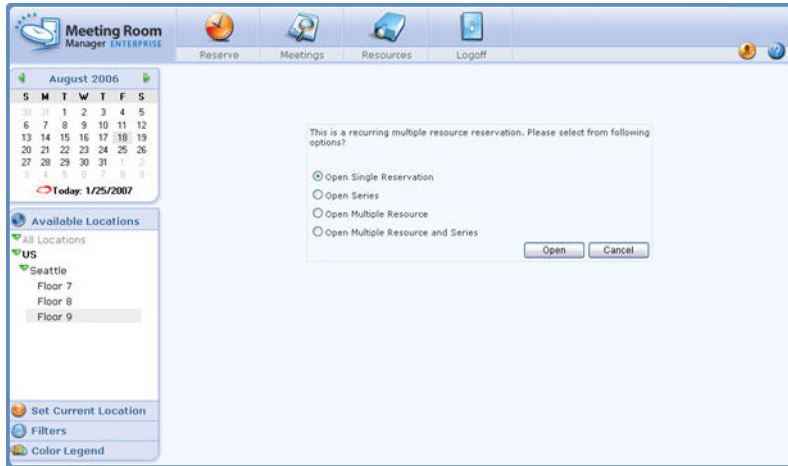
- **Open Multiple Resource**

This opens the selected instance for all resources involved in the multiple resource reservation. 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.



For this exercise, you do not receive a prompt because this is a single reservation.

3. In the Reservation form, make changes as required.

Any changes can be made to the reservation at this time including requirements, date, time, room, etc.

For this exercise, click the **Setup** tab and check the **Conference** box.

4. In a multiple resource reservation, the Update One and Update All buttons are available. Select the options which matches what you wish to do:

The screenshot shows the 'Meeting Room Manager Enterprise' application. On the left is a calendar for August 2006. The top navigation bar includes 'Reserve', 'Meetings', 'Resources', and 'Logoff'. The main window is titled 'Reservation Details' and shows a reservation for 8/18/2006 from 2:30:00 PM to 3:00:00 PM. The reservation is recurring every week on Friday for 10 occurrences. The resources listed are Art Centre (Floor 9/Seattle/US), North Room (Floor 9/Seattle/US), and South Room (Floor 9/Seattle/US). The 'North Room' tab is selected, showing details like Meeting Title, Reservation Type, Host, Client Name, and Client Code. At the bottom, there are buttons for 'Update One' and 'Update All', which are highlighted by a red box.

- **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.

For this reservation, neither of these two buttons are visible because this is a single reservation that only involves one 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.

6. 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.



If you add another resource to a reservation with a service order, you are prompted to copy the service order(s) or cancel. If you cancel, the service order(s) are not copied.

### Delete a Reservation in MRM

Charlie

Any reservation can be deleted. This includes individual reservations, recurring series, a single instance in a series, multiple resource reservations, a single resource's reservation which was part of a multiple resource reservation, or even a single resource's instance of a multiple resource recurring series. All reservations that can be scheduled can be deleted.



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.

For this exercise, find the **second occurrence** of the recurring reservation you created in the **North Room**. The series starts **next Friday** from **10:00 AM to 11:00 AM**. Click on its title in the **month view** of the reservation grid.

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. 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. 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. 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.

For this exercise, select **Open Single Reservation**,

3. When the Reservation form opens, click the **Delete** button.

The screenshot shows the 'Meeting Room Manager' software interface. On the left is a sidebar with a calendar for August 2006 and a list of available locations (Seattle, Floor 7, Floor 8, Floor 9). The main window is titled 'Reservation Details' and contains the following fields:

- Start:** 8/25/2006, 10:00:00 AM
- End:** 8/25/2006, 11:00:00 AM
- Recurrence:** Occurs every week on Friday for 3 occurrences.
- Resources:**
  - ☐ Art Centre (Floor 9/Seattle/US)
  - ☒ North Room (Floor 9/Seattle/US)
  - ☐ South Room (Floor 9/Seattle/US)
- Meeting Title:** Project GH Meeting
- Reservation Type:** Client Meeting
- Booked By:** Charlie
- Host:** (empty field)
- #Attending:** 0
- Client Name:** (empty field)
- Client Code:** (empty field)

At the bottom of the form, there are three buttons: 'Assign Color', 'Delete' (highlighted with a red box), and 'Save and Close'.

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.

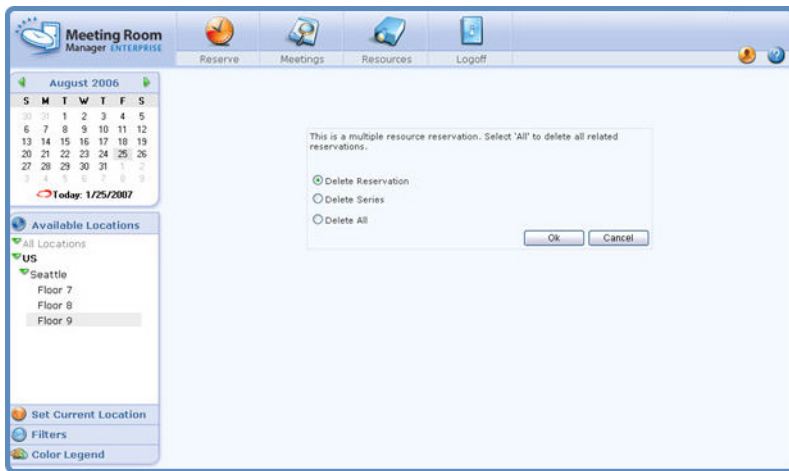
- **Delete Series**

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.

For this exercise, select **Delete Reservation**.



5. Click OK to confirm deletion of the reservation(s).

You are returned to the reservation grid which displays an empty time slot where the reservation you just deleted used to reside.

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.

## Priority Reservations

In some organizations there are staff members who may choose the resources they'd like even if they 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, when a manager from New York visits the Boston office, because he has been granted priority rights for both locations, he can override regular reservations for his visit. However, if he does not have priority rights for Chicago and requires the use of rooms during his visit there, he is not able to override regular reservations. Instead he must add his reservation to the wait list if the resource he wishes to use is already booked.

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

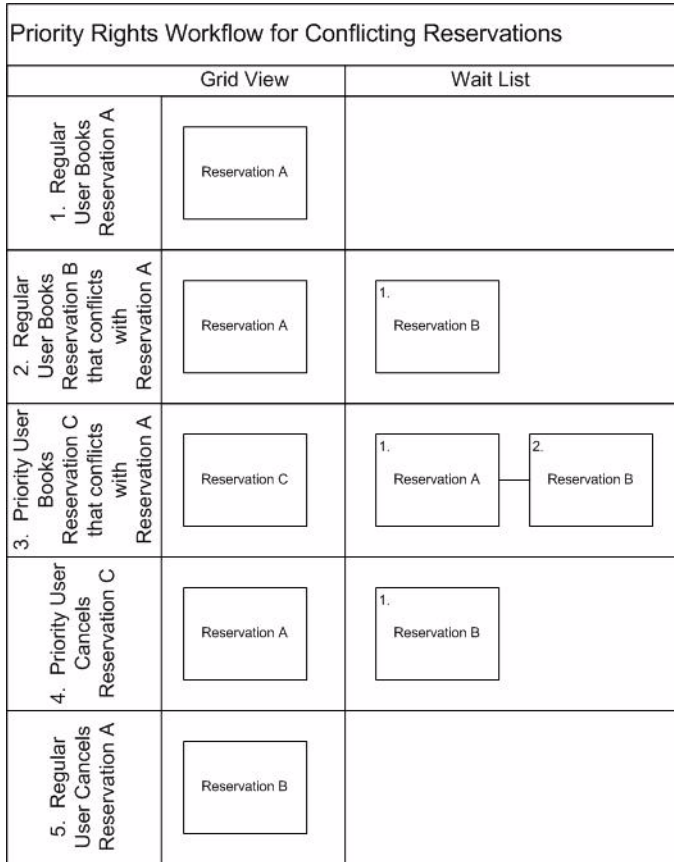


reservations even if they are already confirmed by an administrator. Priority reservations themselves cannot be bumped, even by users who also have priority rights.

**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. As soon as the reservation which bumped them 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:



Rectangle = Regular Booking

Circle = Priority Booking

The reservations shown in the diagram were scheduled in the order they are numbered.

When Res 3 is scheduled, it bumps Res 1 to the wait list because Res 3 is a priority booking while Res 1 is a regular booking. When Res 1 is bumped to the wait list it keeps its standing as next in line. Meeting Room Manager will automatically push Res 1 into its preferred booking space if Res 3 cancels. If Res 1 also cancels, then Res 2 is automatically pushed to its preferred booking space because it is next in line after Res 1.

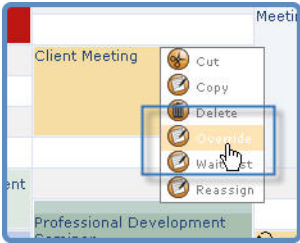
Any time a reservation's wait list status changes, an email is automatically sent to reservation's owner.

### 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).

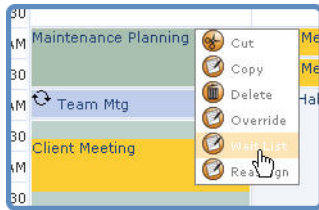
Alternatively, you can hover over an existing regular reservation in the Day view of the reservation grid and select the Override option. The reservation form then opens for you to enter your reservation's details. In this case you will also receive a prompt when you save that indicates the conflict(s)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



## Create a Wait List Entry

Wait list entries can be created two ways. When a user without priority rights tries to save a reservation that conflicts with one or more reservations, a prompt indicates the conflict(s) and provides the option to save the reservation as a wait list request.

Alternatively, 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 in project options.

## Individual Reservation Reassignment

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.

So what happens then, when you create a reservation only to find out the day before it's held that you can no longer host the meeting? Your colleague Chris steps in to host the meeting for you, but do these permissions mean that he cannot make adjustments to the meeting's requirements? Yes they do, but you can use the reassign reservation feature to change the ownership of this meeting from you to Chris. Now he can have full permissions to the meeting as though he created it himself. Let's learn how to do this.



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.

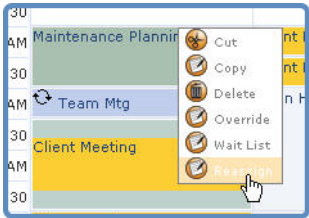
### *Try It!*

The Maintenance Planning meeting you created for next Thursday from 9:00 AM to 10:00 AM needs to have equipment requirements added to it. Olivia, the meeting's host, knows exactly what those requirements are. Signed in as Charlie, reassign this reservation to Olivia so that she can add the requirements to the reservation:

1. In the day view of the reservation grid, hold your mouse over the title of the reservation you wish to reassign to another user.

For this exercise, hold your mouse over the **Maintenance Planning** meeting you created for **next Thursday** from **9:00 AM to 10:00 AM**.

2. From the menu that displays, select **Reassign Reservation**.



3. The Reservation Reassignment form that opens and indicates the meeting title, the current owner, 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.

4. From the Reassign to field, select the username to whom you wish to transfer ownership to.

For this exercise, select **Olivia**.

5. Click the OK button to save the ownership change.

You are returned to the reservation grid where you are no longer able to open the reservation because it is now assigned to Olivia.



## 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.

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### Unit Summary

In this unit you have learned:

- How to edit reservations
- How to delete reservations
- How to use priority rights to override reservations
- How to create a wait list entry
- How to reassign your reservations to another person
- What email reminders you may receive

Now you are ready to learn how MRM integrates with Outlook!

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### The MRM Plug-In for Microsoft Outlook

The Meeting Room Manager Enterprise Edition comes with a plug-in that enables you to schedule the resources and services that are managed by MRM directly in Outlook®.

Creating reservations through Outlook® combines the strengths of Meeting Room Manager and Microsoft® Outlook®:

- Meeting Room Manager provides location and resource information, service item catalogues, and the ability to check room availability and enforce inventory checking and security.
- Microsoft® Outlook® provides the ability to create and send Outlook® Invitations and examine attendee availability for those who share an Exchange server.

Before you can create, modify, and delete MRM reservations through Microsoft® Outlook®, the MRM Plug-In for Microsoft® Outlook® (the MRM plug-in) must be installed and configured. Talk to your network administrator or MRM administrator for details.

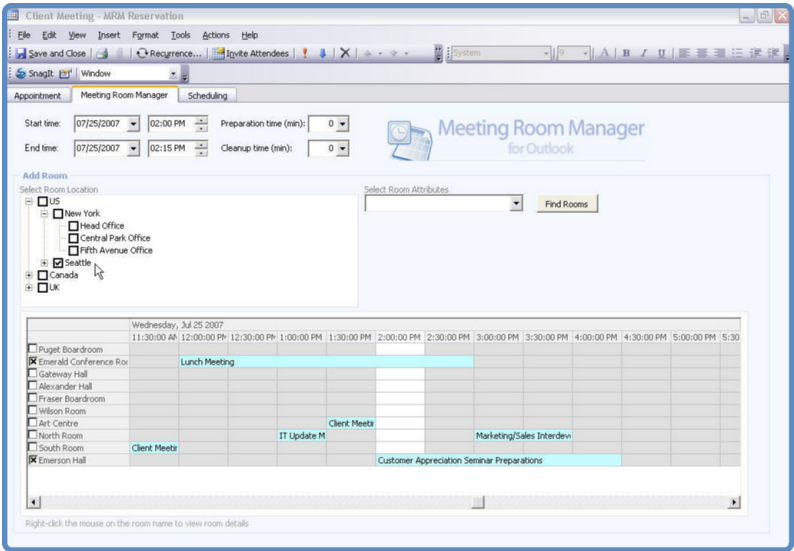
The MRM plug-in adds the MRM Reservation form to Outlook®. This form contains the standard Outlook® Appointment and Scheduling tabs along with a new tab called Meeting Room Manager. It is on the Meeting Room Manager tab that resources and services that are managed by MRM can be scheduled in Outlook®.

If you wish to create an appointment that does not reserve resources and services managed by MRM, the MRM Reservation form will work exactly as the standard Outlook® Appointment form.


Only the MRM reservations you have created using Microsoft® Outlook® can be edited and deleted using Outlook®.

## 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 choose the resources you wish to book.



Once you have chosen the resources you wish to book, you can also place service orders directly from the MRM Reservation form in Outlook.

 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.

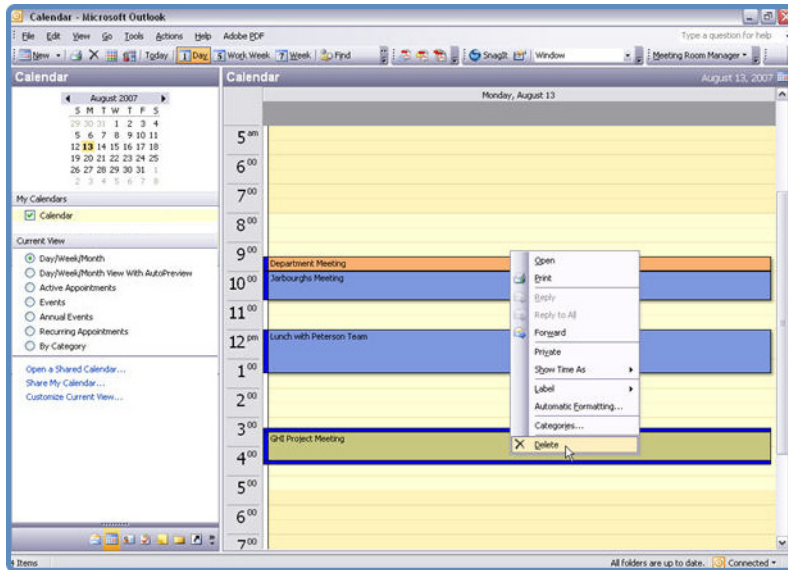
## Edit a Reservation Using Outlook

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.

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## Unit Summary

In this unit you have learned:

- How you can use Microsoft Outlook to schedule reservations in MRM

Now you are ready to find data!

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## UNIT 5

## Finding Data

### Search for Reservations

The 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. As you learned earlier, fields on this form can be designed using the form designer.

Signed in as Charlie, perform a search for a reservation or a set of recurring reservations:

1. Click the **Meetings** icon.

The screenshot displays the Meeting Room Manager Enterprise web application. The interface includes a top navigation bar with icons for Reserve, Meetings, Resources, and Logoff. On the left, there is a sidebar with a calendar for August 2006, a list of available locations (All Locations, US, Seattle, Floor 7, Floor 8, Floor 9), and links for Set Current Location, Filters, and Color Legend. The main content area is titled "Find Reservations" and contains a search form. The form has fields for Location Name (set to Floor 9), Meeting Room, Meeting Title, Booked By (set to Charlie), Host, Reservation Type, Meeting Start, Meeting End, and Client Code. There are Find and Close buttons. A note indicates that the following operators can be used: <, >, \*. Below the form is a table header with columns: Meeting Start, Meeting End, Meeting Title, Meeting Room, Location Name, Reservation Type, Host, Booked By, and Client Code.

2. In the Reservation Search form that opens, 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').
  - To find meetings within a date range, use the greater than, less than, and equal to symbols in the meeting start and meeting end fields. Otherwise you perform a search for meetings starting and ending on the exact dates you've entered.
  - You can click on a pull-down menu to the right of a field to select from default values.

For this exercise, in the Start Date field, enter the greater than symbol '>', the equals sign and then **next Monday's date**. (Eg. >=10/22/2005) Then in the End Date field,

enter the less than symbol '<'; the equals sign and then **next Friday's date**. This search finds all reservations from Monday to Friday next week.

Meeting Start	Meeting End	Meeting Title	Meeting Room	Location Name	Reserve
10/20/2006 2:30:00 PM	10/20/2006 3:00:00 PM	Client Meeting	North Room	Floor 9	
10/20/2006 2:30:00 PM	10/20/2006 3:00:00 PM	Client Meeting	Art Centre	Floor 9	
10/23/2006 2:30:00 PM	10/23/2006 3:00:00 PM	Client Meeting	North Room	Floor 9	
10/23/2006 2:30:00 PM	10/23/2006 3:00:00 PM	Client Meeting	Art Centre	Floor 9	
10/6/2006 3:00:00 PM	10/6/2006 4:00:00 PM	Department Meeting	South Room	Floor 9	IT Depar
10/6/2006 2:30:00 PM	10/6/2006 3:00:00 PM	Client Meeting	North Room	Floor 9	
10/6/2006 2:30:00 PM	10/6/2006 3:00:00 PM	Client Meeting	Art Centre	Floor 9	
9/29/2006 3:00:00 PM	9/29/2006 4:00:00 PM	Department Meeting	South Room	Floor 9	IT Depar
9/29/2006 2:30:00 PM	9/29/2006 3:00:00 PM	Client Meeting	North Room	Floor 9	
9/29/2006 2:30:00 PM	9/29/2006 3:00:00 PM	Client Meeting	Art Centre	Floor 9	
9/22/2006 3:00:00 PM	9/22/2006 4:00:00 PM	Department Meeting	South Room	Floor 9	IT Depar

3. Click **Find** to list all matching reservations.

## Search for Resources

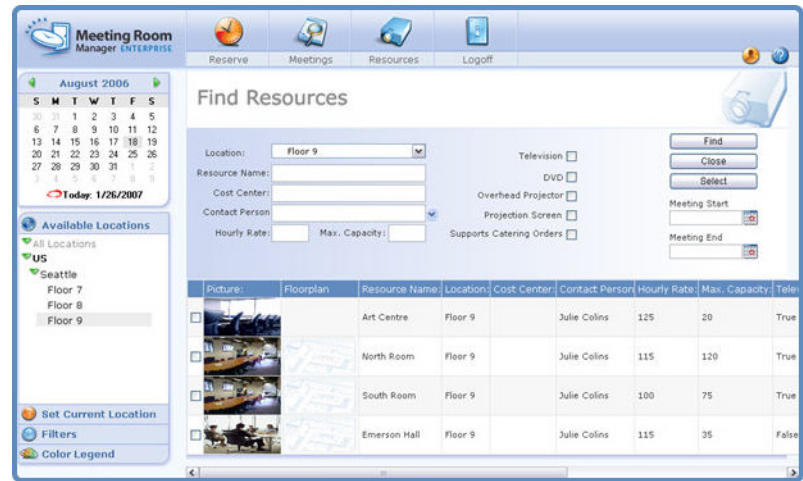
The Find Resources Search form is designed to allow users to quickly and easily find a particular room or group of rooms based on specific criterion. As you learned earlier, fields on this form can be designed using the form designer.

Signed in as Kate, perform a search for a resource:

1. Click the Resources icon.
2. In the Find Resources Search form that opens, 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').

- You can click on a pull-down menu to the right of a field to select from default values.

For this exercise, in the location field, select US/**Seattle**.



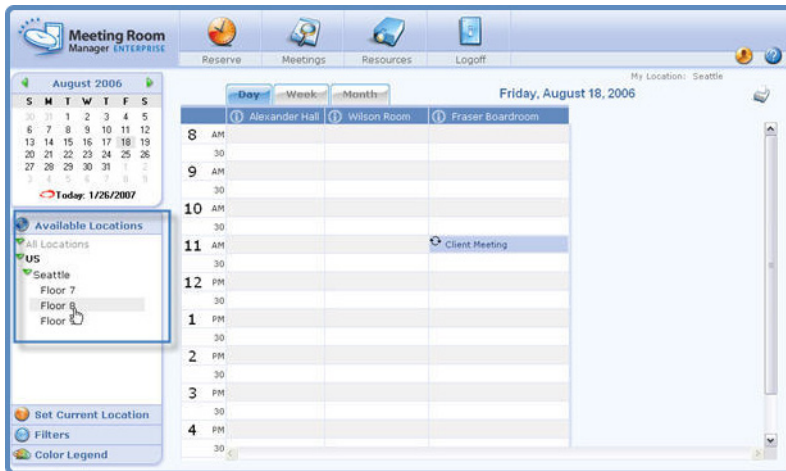
3. Click **Find** to list all matching rooms and resources.

## Filters

Filters allow users to view only the specific information they want to see in the reservation grid. Users without the adding, editing, and deleting filters permission can apply existing filters or create their own temporary filter called a custom filter.

## 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.



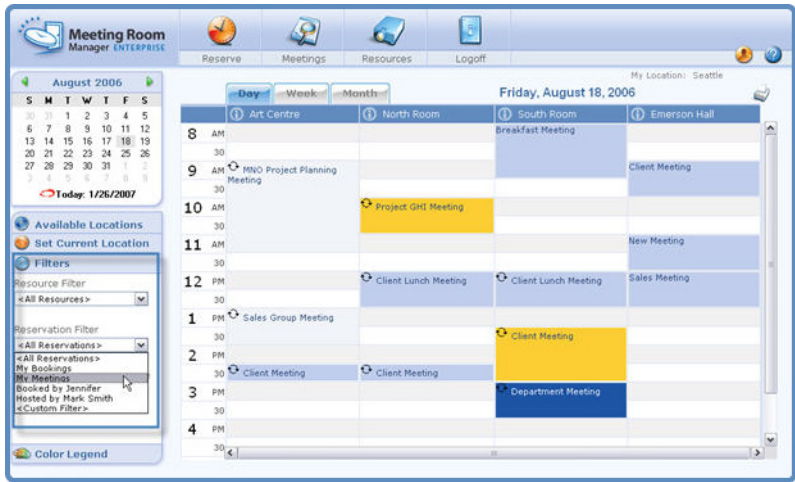
## Apply a Resource or Reservation Filter

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.

Signed in as Charlie, apply an existing filter:

1. Select **Filters** on the left side 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 predefined 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.

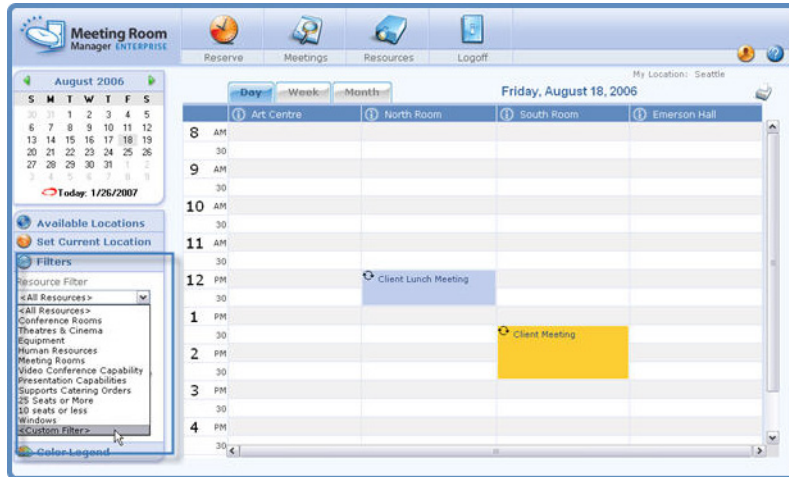
The intent of this filter is to limit the vast number of filters that could accumulate if all users could save their specific filters, and to allow those users without Manage Filters permissions to see their own customized view of the reservation grid.

Sign in as Charlie and apply a custom filter:

1. Select **Filters** on the left side of the main screen.

- From the Resource Filters or Reservation Filters pull-down menu, whichever best applies to the custom filter you are creating, select Custom Filter.

For this exercise, select **Custom Filter** under the **Resource Filter**.



- In the Search form that opens, enter your filter's criterion into the available fields, then click the **Find** button.
  - 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').
  - You can click on a pull-down menu to the right of a field to select from default values.

For this exercise, select **Julie Colins** in the **Contact Person** field.

4. Click the **Find** button.

The screenshot shows the 'Meeting Room Manager Enterprise' application. The 'Find Resources' window is open, displaying search criteria and a table of results. The sidebar on the left contains a calendar for August 2006, 'Available Locations', 'Set Current Location', 'Filters', 'Resource Filter' (set to '<Custom Filter>'), 'Reservation Filter' (set to 'My Meetings'), and a 'Color Legend'. The main area has search criteria: Location (Floor 9), Resource Name, Cost Center, Contact Person (Julie Collins), Hourly Rate, Max. Capacity, and checkboxes for Television, DVD, Overhead Projector, Projection Screen, and Supports Catering Orders. The 'Find' button is highlighted. Below the search criteria is a table of results.

Picture	Floorplan	Resource Name	Location	Cost Center	Contact Person	Hourly Rate	Max. Capacity	Television
		Art Centre	Floor 9		Julie Collins	125	20	True
		North Room	Floor 9		Julie Collins	115	120	True
		South Room	Floor 9		Julie Collins	100	75	True
		Emerson Hall	Floor 9		Julie Collins	115	35	False

5. When you are satisfied with the results, click the **Apply Filter** button.

The grid refreshes, now displaying only the data that qualifies based on the custom filter you just created.

The custom filter will remain intact until you select another filter or log out.



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## Unit Summary

In this unit, you have learned:

- How to search for reservations
- How to search for resources
- How filters function and how to work with them

Congratulations! Your training session is complete. You are prepared to schedule reservations in your own Meeting Room Manager database.

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