CHAPTER **3**

Booking Rooms Using the Portal

This chapter describes the two methods you can use to book the conference rooms using the Smart+Connected MS user portal.

About Quick Reservation

Quick Reservation is a method that assists you in quickly booking the conference rooms for impromptu meetings. It can come handy when you simply want to book a meeting space without using any extra features.

Create a Quick Reservation

To create a quick reservation, perform the following steps:

Step 1 Log in to the Smart+Connected MS portal.

The home page appears with the My Booking tab selected by default.

Step 2 Click **Quick Reservation** in the top right corner of the page.

The Quick Booking page appears. The current date is displayed on the top.

Step 3 From the Meeting Type drop-down list, choose an option depending on the purpose of the meeting. If you choose TelePresence, the application will find rooms that have the TelePresence feature and display them in the search results.

Step 4 From the Duration drop-down list, choose the meeting duration. The available options are divided into 15 minute slots with 1 hour being the maximum duration you can specify.

Step 5 From the Location drop-down lists, choose the country, state, city, campus, and building where you want to book the room. (Optional) To further narrow the search, you can also choose the floor where you want to book the room. By default, the current location that you specify on the Preferences tab is displayed.

Step 6 In the No. of Participants field, enter the number of meeting attendees.

Step 7 Click **Search**.

The conference rooms that meet your criteria or closely match it are listed in the Resources pane with the following details:

- The room(s) you add as your favorite on the Preferences tab appears on the top of the list. A star icon is displayed next to the conference room name.

- A green icon is displayed before the name of rooms that meet your search criteria completely.

- An orange icon is displayed before the name of rooms that match closely with your search criteria but are not available for selection for the specified time.

- Miniature icons depicting the facilities available in the each room are also shown. For example, projector, signage and so on.

- Seating capacity of each room is displayed next to the room name.

Only a certain number of results are displayed per view. Use the left and right navigation buttons to view the other available rooms.

The pane on the right shows the availability of each meeting room for the all of the 24 hour slots in the day represented as a column each. The slots which are busy appear in blue. If the room is booked partially during any one-hour slot, the blue color appears only for that fraction of the slot indicating that the room is partially busy. The duration that you specify for your booking is highlighted for all rooms by a grey vertical bar. Only a certain number of slots are seen in the view and you can use the horizontal scroll bar to view the other time slots.

Step 8   Click the radio button for the room(s) that you want to book. The button turns blue indicating that the room is selected.

Step 9   Click **Book**.

You are taken to the home page where the new booking appears in the calendar view. A message appears at the top of the page informing you that the meeting reservation is completed successfully.

About New Reservation

The New Reservation feature in the Smart+Connected MS user portal helps you to not only search for and book available conference rooms but offers other features that enhance the overall meeting experience. It allows you to filter the room search results, book equipment and other supplies that you require during the meeting, request for arranging the room layout as desired, invite members of your organization and external participants for the meeting, save your searches and the booking drafts, and review your booking summary before confirming a booking.

Creating a New Reservation

The New Reservation process is a detailed procedure that involves the following screens:

Reservation Details

Reservation Details is the first screen of the New Reservation wizard. To make a new booking and to specify the booking details, perform the following steps:

Step 1   Log in to the Smart+Connected MS portal.

The home page appears with the My Booking selected by default.

Step 2   Click **New Reservation** in the top right corner of the page.

The Reservation Details screen appears.

Step 3   Enter the subject of the meeting in the Subject field.

This is the subject of the meeting invite sent to the participants over email. It is also displayed whenever the meeting appear in the calendar and as the subject of the saved draft.

> **Note**   All the fields marked with the star symbol are mandatory. If you proceed to the next page without providing all the required inputs, you will get an error message. The fields where you are required to provide the inputs are highlighted in red.

Step 4   From the Meeting Type drop-down list, choose the required option.

Step 5   Enter the agenda of the meeting in the Meeting Agenda field.

The text you enter here will be sent as the message body of the meeting invite email.

Step 6   By default, the Date field is populated with the current date. To change the date, click inside the Date field. Choose a meeting date from the calendar that appears.

Step 7   By default, the next half-hour slot is taken as the meeting duration. To change the duration, click inside the Starts at and Ends at fields.

The hour and minute selection dialog box appears for both these fields.

a.   Choose an hour slot from the AM or PM list in the Hour column.

b.   Choose any of the 5-minute intervals in the Minute column.

c.   Click **Done**.

When you choose a meeting start time that exceeds the end time, the end time field gets automatically updated to show a time that is an hour more than the start time.

Step 8   Choose any or all of the following options by clicking the radio button for them:

- All day event (9 am to 5 pm)—For meetings that extend for the entire working day.
- Add WebEx Meeting—For hosting a meeting via WebEx.

> **Note**   Enter the password, which the attendees will use to log in to the WebEx meeting, in the WebEx password field if you choose this option.

- Recurrence—For repeating the booking on a daily, weekly, or monthly basis. Recurring booking is useful when you need to organize a meeting with the same agenda, room setup, and attendees repeatedly. For example, daily status meetings or weekly team meetings.

Perform the following steps to make a recurring booking:

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    a. From the Repeats drop-down list, choose **Daily**, **Weekly**, or **Monthly** based on the frequency of the meeting event.

    b. If you opt for the Daily recurrence, choose any option ranging from 1 to 10 from the Repeats every drop-down list. Proceed to Step e.

    c. (Alternatively) If you opt for the Weekly recurrence, choose any option ranging from 1 to 10 from the Repeats every drop-down list. For example, if you want the meeting to recur every alternate week, choose 2. You can also choose particular days of the week, all of the seven days, or only weekdays for the meeting to recur by clicking the radio button for any of these options. Proceed to Step e.

    d. (Alternatively) If you opt for the Monthly recurrence, you can choose to repeat the meeting at any interval ranging from 1 to 12 months. To repeat the monthly booking on the selected date of the month, click the **day of the month** radio button and enter the date in the field that appears. To repeat the booking on a certain weekday of a particular week, click the **day of the week** radio button. From the first drop-down list, choose the week number and from the second drop-down list, choose the weekday.

    e. Click inside the Starts On field. Select a date from the calendar that appears. This will be the start date of the meeting.

    f. For specifying the end of the recurrence, enter the number of times you want to repeat the meeting in the Ends After occurrence field. Alternatively, click the End By radio button and click inside the field. Click a date for ending the recurrence in the calendar that appears.

    g. Click **Done**.

- Confidential—For hiding the subject of the meeting and the meeting organizer's name on the signage/IP phones whenever the schedule for the meeting room is displayed. These meeting will be displayed with subject "Booked".

To deselect the All day event, Add WebEx meeting, and Mark as Confidential options, click the selected radio button again. It will turn grey indicating that the option is deselected. To deselect the Recurrence option, click the radio button again and click Remove in the dialog that pops up.

Step 9   Click the edit ✐ icon for the Primary Location field. Choose the country, state, city, campus, building, and floor from the location drop-down list for each of these options. By default, the current location that you specify on the Preferences tab is displayed.

Step 10   Enter the required seating capacity in the Room Size field.

Step 11   (Optional) Click the edit ✐ icon for the Secondary Location field. From the location drop-down list for each of these options, choose the country, state, city, campus, building, and floor. Click the ➕ icon to add multiple secondary locations.

The Secondary Location details can be entered when attendees are expected to attend the meeting from different location/meeting rooms.

Step 12   Click a room layout style image in the Room Setup area to have the room arranged as desired.

The setup and de-setup time and the minimum notice period is displayed for the chosen setup.

    ✎ **Note**   Rooms which can be arranged in the type of setup that you request will be displayed in the search results. Ensure that the duration before the meeting starts is equal to or more than the minimum notice period. For example, if the current time is 11 am and the auditorium type of setup requires 2 hours, you should choose the meeting start time as 1 pm or any slot after that.

Step 13   Click **Save and Proceed** to go to the Room and Attendees screen.

Step 14   (Optional) Click **Save Draft** if you do not wish to book a conference room currently and want to use the information you have specified at a later time. The draft can be retrieved from the Saved Drafts list that appears in the Reservation Details screen the next time you make a new booking.

Step 15   (Optional) Click **Cancel** if you want to cancel the booking process.

Click **Yes** in the Confirm Cancel dialog that opens. You are re-directed to the home page.

Rooms and Participants

Rooms and Participants is the second screen of the New Reservation wizard. It displays the list of available rooms that meet the criteria that you specified in the Reservation Details page. This screen also lets you add the participants for the meeting.

To add rooms and participants, perform the following steps:

Step 1   The Resources pane on the left side of the Rooms and Attendees screen displays the search results for the location you specified.

The following details are displayed for the conference rooms:

- The room(s) you add as your favorite on the Preferences tab appears on the top of the list. A star icon is displayed next to the conference room name.

- A green icon is displayed before the name of rooms that meet your search criteria completely.

- An orange icon is displayed before the name of rooms that match closely with your search criteria but are not available for selection for the specified time.

- Miniature icons depicting the facilities available in the each room are also shown. For example, projector, signage and so on.

- The seating capacity of each room is displayed next to the room name.

Only a certain number of rooms are listed per view. To see the other rooms (if any) or to go back to the initial list of rooms, click the left and right navigation buttons.

The pane on the right shows the availability of each meeting room for the all of the 24 hour slots in the day represented as a column each. The slots which are busy slots appear in blue. If the room is booked partially during any one-hour slot, the blue color appears only for that fraction of the slot indicating that the room is partially busy. The duration that you specify for your booking is highlighted for all rooms by a grey vertical bar. Only a certain number of slots are seen in the view and you can use the horizontal scroll bar to view the other time slots.

Step 2   (Optional) Click the left and right navigation buttons beside the meeting date displayed above the Resources pane to view the meeting rooms available on the other dates. Once you know which rooms are available for the other times and dates, you can change the meeting date or time by clicking the edit ✎ icons next to the date and time displayed in the top of the page. For recurring meetings, you can edit only the time from this page. The edit date icon is unavailable for recurring meetings and what you see is the ↻ icon indicating that it is a recurring meeting. After you change the date or time, click the Update Results link to get the search list updated based on the changed date and time.

For a more detailed edit and to change the date of a recurring meeting, click the Modify Search link provided at the top right side of the Rooms and Attendees page. This takes you back to the Booking Details page, which is populated with all the settings that you configured previously.

Step 3 Click the radio button for any available room(s) to choose it. It will turn blue indicating that the room is selected. To deselect any of the selected rooms, click the selected radio button again. It will turn grey indicating that the room is deselected.

If you choose a room which is smaller than the room size that you specified in the Booking Details page, and click the Skip to Summary or the Save and Proceed button you get a message informing you of this that asks you if you want to choose another room.

> ✎
> **Note** Choosing a room is not mandatory for booking a meeting. But if you want to proceed to the Services screen, choosing at least one room is mandatory.

Step 4 Click the ➕ button to add the participants for the meeting.

The Select Participants dialog box appears.

Step 5 Enter the names of the attendees in the Required Participants field and Optional Participants field. You can choose any option from the list of names that appears when you type the first four alphabets of a user's name. It displays the names of all the users in the database whose name starts with the alphabet characters that you entered. The names of the various users that you select are separated by semi-colons.

Step 6 Enter the email addresses of the people who are not a part of the company database, but that you want to invite for the meeting in the Visitors field.

Step 7 Click **Done** to close the Select Participants dialog box and return to the Room and Participants screen.

The names of the participants that you have chosen appear in the Resources pane along with their usernames. Your name is included by default in the Participants list as you are the organizer of the meeting. A green icon appears before their names if the users are available during the time that you have selected for the meeting. The red icon before an invitee's name indicates that the person is busy during the time of the meeting.

Step 8 The right pane displays the availability/non-availability of each of the attendees, similar to the room availability pane mentioned in Step 1.

Step 9 Click the cancel ✖ icon against any name to remove the person from the Participants list.

Step 10 (Optional) To filter your room search, do the following:

a. Click the 🔍 icon in the Resources pane.

b. Enter the location for which you want to search the conference rooms in the Location Name field.

c. Click the icon(s) for the features you want in the conference rooms. The icons that you select appear dimmed.

d. Click **Filter**.

The search result shows the rooms that meet the additional requirements.

Step 11 Once you have entered all the details that you want in the Rooms and Participants screen, you can click any of the following buttons:

- **Skip to Summary**—The new booking process ends and you are taken to the Summary screen where you can confirm the reservation.
- **Save and Proceed**—This saves all the settings and takes you to the Services screen where you can book resources for the conference room.
- **Save Draft**—The settings chosen in this screen and the previous screen are saved and appear in the Saved Drafts list in the Reservation Details screen and in the home page. Drafts are saved with the same name as the meeting subject. You can select any draft from the drafts list and proceed further/edit it any time that you want.

- **Back**—This takes you back to the Reservation Details screen where you can edit and modify the initial parameters based on which the Smart+Connected MS application searches for the conference rooms.

- **Cancel**—This cancels the booking process and re-directs you to the home page.

Services

This is the third screen of the New Reservation wizard. It is not a mandatory step in the booking process unless you want to book some additional things required for your meeting. This page does not appear if you click the Skip to Summary button after selecting the room and adding participants for the meeting.

To book resources for the meeting, perform the following steps:

Step 1   From the Resources pane, choose an item by clicking it.

The equipment is added as a row to the table in the right pane which has the following columns:

- Resource Name—The name of the selected item.

- Notes—Any additional requirements or specifications can be added here. For example, if you order a projector and need a special connecting cable for your laptop, you can mention it in this field.

- Location—Enter the location for which you want the item to be supplied.

- Available Quantity—The number of units of the item that are in stock and ready for use.

- Required Quantity—Enter the number of the items that you want in this field. The number should not be more than the quantity available.

- Action—Shows a cancel ✖ icon that you can click to delete an individual item from the table. The entire row for the item is removed as a result of this action.

Step 2   Repeat the procedure in Step 1 for any additional resource(s) that you want. You can also choose an item already in the list if you want it for another location(s).

Step 3   (Optional) To delete all the resources from the list and start the selection afresh, click **Delete All**.

Step 4   Once you have entered all the details that you want in the Services page, you can click any of the following buttons:

- Save and Proceed—This saves all the settings and takes you to the Summary screen.

- Back—This takes you back to the Rooms and Participants screen where you can change the conference rooms selection and modify the attendee list.

- Cancel—This cancels the booking process and re-directs you to the home page.

Summary

This is the last screen of the New Reservation wizard. It appears when a user opts to finish the new booking process either from the Rooms and Participants page or the Services pages. The page displays all the meeting, room, equipment, and attendee details. Before the final confirmation screen is displayed, the entire booking summary is displayed. The booking takes place only after you verify the details from the summary and confirm.

To confirm the booking, perform the following steps:

Step 1 Verify that the following details displayed in the Summary screen are per your booking requirements:

- Subject—Helps the participants know the purpose of the meeting. The icon appears if it is a WebEx meeting.
- Date—The date of the meeting. For recurring meetings, the date of the first meeting followed by dates of the other occurrences is displayed.
- Time—The start and the end time of the meeting.
- Organizer—Your username is displayed.
- Mark as Confidential—Shows Yes if you have chosen the Mark as Confidential option in the Reservation Details screen; otherwise the value shown is No.
- Meeting Type—Whether the meeting is a normal, team, presentation, or TelePresence meeting.
- Room Setup—The room setup type is shown if you have chosen to re-arrange the room layout.
- Meeting Rooms—The names of the meeting rooms along with the detailed location including the floor, building, campus, city, state, and country. The icons for the features available in the rooms are also shown. For example, A/V controls, TelePresence, and so on.
- Participants—The names of the people that you have invited for the meeting.
- Resources—The name of the items, the location for which they are ordered, the quantity that you require during the meeting, and the meeting notes.

Step 2 Click **Confirm Reservation**.

This takes you to the page that confirms that the booking is done and the participants will be notified through email. It displays the entire summary again.

> **Note** You also receive emails whenever the invitees accept, tentatively accept, or decline the meeting request that you send to them.

Step 3 Click **Home** to return to the home page.

New Reservation Use Case

User A is an entrepreneur who resides in Dallas, USA and the marketing team is based in New Delhi, India. The following example describes how User A and the team coordinate using the Smart+Connected MS user portal.

1. User A logs in to the Smart+Connected MS user portal and uses the New Reservation option to organize a meeting for discussing the India strategy with the team. For more information about the New Reservation process, see the "Creating a New Reservation" section on page 3-2.

2. Because the team is overseas and a personalized and interactive approach is required, User A chooses the TelePresence type of meeting and specifies the pre-launch task outline and objectives in the Agenda field. User A adds the main points of discussion in the Meeting Notes. When the team gets the meeting invitation through email, the message body displays the plan outline, objectives, and points of discussion. The team members get a basic idea about the purpose of the meeting. For more information, see the "Reservation Details" section on page 3-3.

3. To devise an effective plan and get regular inputs, User A schedules the meeting on Tuesday and Friday every two weeks for the critical 3-month period before the product launch using the Recurrence option.

4. The sales staff conducting the door-to-door surveys has already conveyed the inability to report to the main office every week. User A uses the Add WebEx meeting option. These team members can join the meeting using the link and password provided in the email invite.

5. Because the TelePresence facility is required for both the offices, User A enters the details of the Dallas campus in the Primary Location field and the details of the Bangalore campus in the Secondary Location field. If all the members on the India team, including the field staff attend the meeting, the total strength would be 30. Therefore, User A specifies 30, as the room size for the secondary location.

6. User A chooses the room from the search results and adds the participants by choosing their names from the automatic suggestions based on the list of company employees. For inviting an external member of the board and a marketing strategy expert whose names are not included in the database, the entrepreneur enters their email addresses in the Visitors field. For more information about choosing rooms and inviting participants, see the "Rooms and Participants" section on page 3-5.

7. The global sales head pops into the entrepreneur's office and suggests aggressive planning and very regular discussions. User A clicks Modify Search. This re-directs to the Booking Details page and the entrepreneur changes the frequency of the meeting to every one week.

8. User A then proceeds to book the laptop chargers and optical mouses that the team may require during the meeting. This is delivered to the meeting room that is booked for India. For more information about booking resources, see the "Services" section on page 3-7.

9. After verifying all the meeting details from the summary, User A confirms the booking. Invites are sent to all the participants by email. User A is notified through email whenever any of the participants accept, tentatively accept, or decline the invite. For more information about the meeting summary, see the "Summary" section on page 3-7.

10. The marketing head in India, User B, wants to invite a few additional stakeholders for the first meeting. User B logs in to the Smart+Connected MS web portal, clicks the first meeting instance in the calendar and chooses the Edit Series option. User B adds another meeting room and a few more participants. For more information on editing meetings, see the "Editing Meeting Details" section on page 4-3 in Chapter 4, "Managing Meetings Using the Portal".

11. The corporate communication manager, User C, leaves for India to close the deals with the media agencies there. User C goes to the Preferences page in the portal and changes the time zone to GMT+5.30. This ensures that the calendar is in sync with the local time, that is, all the meeting invites are displayed in India time. For more information on changing your preferences, see the "Configuring Meeting Preferences" section on page 4-4 in Chapter 4, "Managing Meetings Using the Portal".

12. Once the initial meetings are conducted, work is assigned to all of the team members. A marketing executive, User D, realizes that all-day meetings are scheduled every Tuesday and Friday to supervise the market research activities and the executive would have to skip the meetings. User D logs in to the portal, clicks the meeting instance, and then clicks Decline. User A receives e-mails about the invite being declined and is therefore informed that User D would not attend the meetings. For more information on viewing meetings and accepting/declining meetings, see the "Viewing Meetings" section on page 4-1 and "Accepting/Declining Meetings" section on page 4-3 in Chapter 4, "Managing Meetings Using the Portal".

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