

CHAPTER 4

Managing Meetings Using the Portal

This chapter explains how you can manage your meetings and set the meeting preferences using the Smart+Connected MS web portal.

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Viewing Meetings

You can view all of your meetings using the calendar in the Smart+Connected MS web portal home page. For more information, see the [“Day View” section on page 2-4](#), [“Week View” section on page 2-4](#), and [“Month View” section on page 2-4](#) in Chapter 2, [“Smart+Connected MS Web Portal”](#).

The saved drafts are listed on the right hand side of the home page. For more information, see the [“Saved Drafts” section on page 2-5](#) in Chapter 2, [“Smart+Connected MS Web Portal”](#).



Note

You can also view all the meetings that you are a part of in your Microsoft Outlook calendar as the Smart+Connected MS meetings are synchronized with the Microsoft Exchange. You can accept, decline, join, edit, and delete the meetings from your mail client.

Setup/De-Setup and Services Requests

If you are the facilities administrator, you will automatically get room setup and/or de-setup requests as email invites based on the time set by the Smart+Connected MS portal administrator. These service requests are similar to the other meeting invites and appear in the calendar when you log in to the Smart+Connected MS web portal. For the resource requests that the other portal users place while they book meetings, you receive emails similar to meeting invites informing you about the item and quantity required, and the time and place where the item is required.





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Using Saved Drafts

During the process of booking a meeting, you can save the details you have entered and use them to organize a meeting at a later time. The Save Draft option is available in the Booking Details, Rooms and Attendees, and Services page. The changes that you make in any of these pages and the pages before them are saved as drafts. Once you organize a meeting using a draft, the draft is removed from the list of drafts.


To use a saved draft, perform the following steps:

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- Step 1** Log in to the Smart+Connected MS portal.
- The home page appears with the My Booking tab selected by default. The Saved Drafts list displayed in the right hand corner.
- Step 2** The list of saved drafts shows the most recently saved drafts on top followed by the previous ones. Only a certain number of drafts are shown per view. Click any of the page numbers to view the other drafts. To scroll through the drafts page list, click the following buttons:

-  Scroll the page list to the next page.
-  Scroll the page list to the last page.
-  Scroll the page list to the previous page.
-  Scroll the page list to the first page.



Note You can also use a saved draft from the list displayed in the Reservation Details page.

- Step 3** Click the edit  icon for the draft that you want to use.
- The Reservation Details screen appears populated with all the details that you entered earlier.
- Step 4** Make the required changes in the Booking Details page. Click **Save and Proceed**.
- The Rooms and Attendees page appears.



Note Instead of clicking Save and Proceed, you can click Save Draft in the Reservation Details or the Rooms and Participants screen. This replaces the existing draft with the current version, which you can use later.

- Step 5** Make the required changes or provide the additional details in the Rooms and Attendees page. Click **Save and Proceed**.
- The Services page appears.
- Step 6** Enter the required details in the Services page. Click **Save and Proceed**.
- The booking summary appears.
- Step 7** Click **Confirm Booking**.
- The Summary screen appears. You are informed that the booking is done. The draft is removed from the lists of drafts.
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Editing Meeting Details

You can edit the meetings, which you have organized, from the meetings displayed in the calendar view in the home page. The invitees get an email informing them that the meeting has been edited. This email contains all of the updated details.

To edit a meeting, perform the following steps:

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- Step 1** Log in to the Smart+Connected MS portal.
The home page appears with the My Booking tab selected by default.
- Step 2** In the calendar, click the meeting that you want to edit.
The Edit Meeting dialog box appears.
- Step 3** Click **Detailed Edit**. For recurring meetings, click **Edit Occurrence** to edit the single instance of the meeting, that is, the one that you have clicked. Click **Edit Series** to make changes that apply to all the meetings instances.
The Reservation Details screen opens.
- Step 4** Make the required changes in the Reservation Details, Rooms and Participants, and/or the Services screen and proceed to the Summary page. Click **Confirm Reservation**.
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Accepting/Declining Meetings


You can accept, tentatively accept, or decline any meeting you have received using the calendar view in the Smart+Connected MS user portal home page.

To accept or decline a meeting, perform the following steps:

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- Step 1** Log in to the Smart+Connected MS portal.
The home page appears with the My Booking tab selected by default. The list of meetings that you have organized appears in a pane on the right hand side of the page.
- Step 2** Click the meeting instance in the calendar view.
The Meeting Details dialog box appears.
- Step 3** Review the meeting details, and click **Accept**, **Decline**, or **Tentative** based on your decision to attend the meeting.
Clicking the Decline button removes the meeting from your calendar view. You can decline tentative or accepted meetings anytime later if you want. Alternatively, you can accept a meeting that you had marked earlier as tentative.



Note For recurring meetings, the Accept/Decline/Tentative option will apply to the entire series and not just the occurrence you clicked in the calendar.

- Step 4** (Alternatively) If you do not want to make any of the choices mentioned in [Step 3](#), click **Done** or click the cancel  icon in the top right corner to close the Meeting Details dialog box.
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Deleting Meetings

You can delete the meetings that you have organized from the calendar in the home page. The invitees get an email informing them that the meeting is cancelled. The schedule of the room that you booked for the meeting is updated and the room is made available for booking again.

To delete a meeting, perform the following steps:

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- 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 the meeting you want to delete in the calendar.
The Meeting Details dialog box appears.
- Step 3** Click **Delete**. For recurring meetings, click **Delete Occurrence** to delete the single instance of the meeting, that is, the one that you have clicked. Click **Delete Series** to delete all the recurrences.
The deleted meeting(s) is removed from the calendar.
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Configuring Meeting Preferences


You can configure settings such as your preferred rooms, time zone, and location using the the Preferences tab. This is the main tab in the portal along with the My Booking tab.

To configure your meeting settings, perform the following tasks:

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- 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 the Preferences tab.
The My Preference page appears.
- Step 3** From the Time Zone drop-down list, choose your preferred time zone.
All the meetings in the calendar view in the home page are displayed in your preferred time zone. The schedule of meeting rooms and participants while booking are also displayed in the preferred time zone. The meeting invites are visible to attendees based on the time zone that they choose.
- Step 4** From the Locale drop-down list, choose the required option.
This determines the date format displayed to you in portal.



Note

- Step 5** Perform the following steps in the Location area:
- Click the edit  icon.
A dialog appears.
 - From the first drop-down list in the dialog, choose the country. From the second drop-down list, choose the state.

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- c. Click **Done**.

The chosen country and state are listed next to the Country and State text fields.

- d. Choose the city from the first drop-down list in the Location area.

Another drop-down list appears.

- e. Choose the campus from the second drop-down list. Repeat the procedure to choose the building, and floor from the drop-down lists that appear.


The locations you choose here will be automatically populated every time you try to create a booking using the New Reservation wizard or the Quick Reservation option.

Step 6 Perform the following steps in the Favorite Rooms area:

- a. Repeat the procedure mentioned in [Step 5](#) to choose the country, state, campus, building, floor, and meeting room from the drop-down lists.

- b. Click **Add room as Favorite**.

The room appears under the Favourite Rooms area.

- c. (Optional) Click the cancel  icon for any of the rooms, which appear under the Favourite Rooms area, to remove them from the list.

The rooms that you add as favorites appear with a star icon in the room search results and are displayed on the top of the list.

Step 7 Click **Save**.

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