Administrators Guide

This guide is for Administrators and deals with concepts of site configuration.

Preparing your site

These are the steps before setting up a site.

The Basics

• List all the resources you want to book through EZBook.
• Sort these into types (e.g. meeting rooms, equipment, parking bays). These broad categories will form your facility types.

back to top

Advanced Configuration

If you have a complex site, you may want to group the resources into resource groups and the users into user groups. Permission to book specific resources can be granted to user groups or individual users.

• Decide how to group the resources (e.g. group them according to branches of the organization). These sub-divisions will become your resource groups.
• Decide which groups of people will access the various resources (e.g. you may wish to allow Directors to book resources at all branches, but to allow sales staff to book meeting rooms only at the branch at which they are based). These groups can be used to form your user groups.

back to top

Users

What are users?

Users are those people to whom you give permission to access your EZBook site. They may be members of your organization, or they could be clients whom you allow to self-register as users of your EZBook site. Each user has a unique logon name and password.

There are two types of user:

Administrator Users
There must be at least one Administrator, who has complete control of the booking system. There is no limit to the number of Administrators you can have, but in most firms it will be practical to have more than one. They set-up the firm's EZBook system, define the resources and descriptions and allocate the level of rights for General Users.

General Users
The Administrator(s) can limit the rights of General Users in relation to what resources they can book. Additional information is given under User permissions.

Similar types of general users can be grouped together in user groups. Permissions to book various resources can then be given to the group as a whole. For more information on user groups, see What are user groups?

back to top

Adding new users

There are two ways of adding new users:

• Users can be allowed to self-register.
• The Administrator can add each user.

Allowing users to self-register

Self-registration is the process by which people can be allowed to register themselves as general users of an EZBook site. They can create their own logon accounts, which can save the Administrator time and effort. It also means that a public EZBook site can be made available to those people who need to use the booking resources but who have not been predefined as general users by the Administrator. (An example of an appropriate situation for self-registration might be for the public booking of a limited number of places at a seminar).

To allow anybody to register, the Administrator must enable self-registration, but must not provide a self-registration password. On the logon page, self-registration users should click "Create Logon" and then type their own details and password.

To provide some control over who may register, the Administrator can enter a password to restrict self-registration access. This password should then be disclosed only to permitted users who enter the password after clicking "Create Logon", when they create their own logon account.

To allow users to self-register, the Administrator should click the "Admin" tab, and select "Modify Site Settings" in the left-hand navigation panel. Select the "Allow users to self-register" check box. Type the self-registration password in the "Password" box, if required.

Adding users

To create a new user account, the Administrator should click the "Admin" tab and click "Add" in the User section in the User Setup and the page and the "New User" page is displayed.

In the "General Details" section, type the full name of the user in the "User Name" box and the logon name of the user in the "Logon Name" box. The remaining details in the "General Details" section are optional. Record the information by clicking "Save".

(Each logon name must be unique and is restricted to 20 characters in length).

Passwords

Type a password for the user in the "Logon Password" box, and confirm the password by typing it again in the "Confirm Password" box. Click "Save".

(Passwords in EZBook are restricted to 10 alphanumeric characters, and are case-sensitive).

Contact details

If you want the user to receive system or user-to-user messages, type the user's e-mail address in the "e-mail Address" box. You may type a contact phone number or extension in the "Phone Number (s)" box, and type descriptive information about the user in the "Supplementary Info" box. To record this information, click "Save".

User Permissions

The two administrative levels for users are:

- Administrator
- General User

The initial creator of an EZBook site is automatically made an Administrator. There must always be at least one Administrator. Later any General Users can be given Administrator rights. The site creator can relinquish Administrator rights to another user, provided the other user is first made an Administrator.

General Users inherently only have rights to access the booking system. However, they can be granted one or more of the following additional administrative rights:

- User management
- Facility management
- System management
- Booking management

A General User who is granted all four rights effectively becomes another Administrator.

To grant a General User additional administrative rights click the "Permissions" link to go to the Permissions section.

To make a General User an Administrator User select "Administrator" in the "Admin Level" drop-down list.

To grant a General User permission to create new accounts, delete existing users and change user details, select the "Manage Users" check box.

To give a General User permission to create new resources to be booked, delete existing resources and update the configuration and other details for the existing resources, select the "Manage Facilities" check box.

To give a General User permission to update the system preferences and settings, select the "Manage System Settings" check box.

To give a General User permission to cancel bookings made by other users, select the "Cancel Bookings" check box.

When you have finished granting permissions to the user, click "Save" to submit the changes.

Group Membership

Any user can belong to one or more User Groups. Group membership can be controlled either from the Group's perspective or the user's. For information about creating User Groups, see Adding new User Groups.

To place a User in one or more groups, click the "Group Membership" link to go to the Group Membership section.

To add a User to a User Group, select the relevant group in the "Available Groups" list.

(Hint: You can select all the User Groups by clicking the first one in the list, and holding down the SHIFT key while clicking the last one in the list. Alternatively, click the first one in the list, and hold down the CTRL key while making further selections.)

After selecting the User Groups, move them into the "Member of" list by clicking the right-pointing arrow between the two lists.

To remove a user from a User Group, select the relevant User Group in the "Member of" list, and click the left-pointing arrow between the two lists.

When you have finished assigning the User to the User Groups, click "Save".

back to top

Changing user information

Click the "Admin" tab and in the User section in the User Setup, select the relevant user in the users list and click “Edit”. The "User Details" page is then displayed, with the details of the selected user.

For additional information see:
Changing user passwords
Changing user permissions
Changing group membership
Deleting users

back to top

Changing user passwords

On the "User Details" page, click "Change Password" to open the "Edit User Password" dialog box. Type the user's new password in the "Password" box, and confirm the new password by retyping it in the "Confirm Password" box. Click "Save".

back to top

Changing user permissions

On the "User Details" page click the "Permissions" link to go to the Permissions section.

Make the required changes and then click "Save".

For information on granting user permissions, see User permissions.

back to top

Changing group membership

On the "User Details" page click the "Group Membership" link to go to the Group Membership section.
When you have made the required changes, click "Save".

For information on assigning Users to User Groups, see Group membership.

back to top

Deleting users

To delete a user, click "Delete" at the bottom of the "User Details" page. You will be required to confirm the deletion by clicking "OK" at the prompt. A confirmation message is displayed after the user has been deleted.

back to top

Resources

What are resources?

In EZBook terminology, a resource is anything that can be scheduled or booked for use. Examples include staff duties, rooms and items of equipment.

Although EZBook resources can be classified in any grouping of types (by an Administrator), the following sample set is provided as the initial default:

- Equipment
- Meeting rooms
- Parking garages
- People
- Vehicles

These are known as Resource Types.

To rationalize the presentation of resources they can be filtered in groups. In some situations it may be convenient for the group to be the physical location (e.g. at Head Office or at, say, the London Branch). These filters are known as Resource Locations.

back to top

Adding new resources

To add a new resource, click the "Admin" tab and select "Resource Setup" in the navigation panel. Click "Add" at the bottom of the page so that the "New Resource" page is displayed. In the "General Details" section, type the name of the new resource in the "Resource Name" box. See Rules for Resource Names below.

Type the description to be displayed as a ToolTip in the "Description" box.

Select the type of resource from the "Resource Type" drop-down list. For information on creating your own resource types, see Adding new resource types.

Select the group to which the new resource belongs from the "Resource Group (location)" drop-down list. For information on creating resource groups (locations), see Adding new resource groups (locations).

Submit the information by clicking "Save".

Rules for Resource Names:

• The names are restricted to 250 characters in length and may not contain a double quotation mark (").
• Names must be unique within each Resource Group. (For example, it is possible to have a resource called "Boardroom" in the Head Office resource group and another facility called "Boardroom" in the Local Sales resource group, but you cannot have two resources called "Boardroom" in the Head Office resource group).

For additional information see:
Granting booking rights
Granting viewing rights
Setting operation hours
Setting custom attributes

back to top

Granting booking rights

Users have no rights on resources until these are individually granted. Once granted the right to book a resource, the user is able to view the booking schedule and book the resource.
To grant booking rights click the "Booking Rights" link to go to the Booking Rights section.
There are two options for granting booking rights:

• All Users
• Specific Users/Groups

For information on specific booking and viewing options, see Booking and Viewing Options.

back to top

Granting viewing rights

Users granted the right to view a resource can see its booking schedule but cannot book the resource unless the Booking Rights are specifically granted.
To grant viewing rights click the "Viewing Rights" link to go to the Viewing Rights section.
There are three options for granting viewing rights:

- All Users
- Specific Users/Groups
- All users that have booking rights

For information on specific booking and viewing options, see Booking and Viewing Options.

back to top

Booking and viewing rights

All users

To give all users the right to book or view a resource, select "All Users" in the "Who can book the resource?" and/or "Who can view the schedule?" list(s).

Specific Users/Groups

To give specific users and/or user groups the right to book or view a resource, select "Specific Users/Groups" in the "Who can book the resource?" and/or "Who can view the schedule?" list(s).

Select the user(s) in the "Available Users" list. Move the user name(s) into the "Users with Permission" list by clicking the right-pointing arrow between the two lists.

(Tip: To select more than one user, click the first name in the list, and hold down the CTRL key while making further selections).

To allow a user group to book or view a resource, select the User Group(s) in the "Available User Groups" list. Move the User Group(s) into the "Groups with Permission" list by clicking the right-pointing arrow between the two lists.

To remove a User's permission, select the user in the "Users with Permission" list, and click the left-pointing arrow between the two lists.

To remove a User Group's permission, select the User Group in the "Groups with Permission" list, and click the left-pointing arrow between the two lists.

All users that have booking rights

To restrict the right to view a resource to those users that have booking rights, select "All users that have Booking Rights" in the "Who can view the schedule?" drop-down list.

When you have finished assigning permissions to users and user groups, click "Save".

Booking Moderator

Specify if you would like the moderator feature enabled, by selecting the check box next to Moderator Feature Enabled. Ensure that "Booking Rights" is set to "Specific Users / Groups"

After enabling the Moderator feature, you need to allow users the following:

Request rights

Select the users and/or user groups who are allowed to request rights. .

Select the user(s) in the "Available Users" list. Move the user name(s) into the "Users with Permission" list by clicking the right-pointing arrow between the two lists.

(Tip: To select more than one user, click the first name in the list, and hold down the CTRL key while making further selections).

To allow a user group to have request rights, select the User Group(s) in the "Available User Groups" list. Move the User Group(s) into the "Groups with Permission" list by clicking the right-pointing arrow between the two lists.

To remove a User's permission, select the user in the "Users with Permission" list, and click the left-pointing arrow between the two lists.

To remove a User Group's permission, select the User Group in the "Groups with Permission" list, and click the left-pointing arrow between the two lists.

Moderator rights

Select the users and/or user groups who are allowed to accept or reject bookings this resource.

Select the user(s) in the "Available Users" list. Move the user name(s) into the "Users with Permission" list by clicking the right-pointing arrow between the two lists.

(Tip: To select more than one user, click the first name in the list, and hold down the CTRL key while making further selections).

To allow a user group to have Moderator rights, select the User Group(s) in the "Available User Groups" list. Move the User Group(s) into the "Groups with Permission" list by clicking the right-pointing arrow between the two lists.

To remove a User's permission, select the user in the "Users with Permission" list, and click the left-pointing arrow between the two lists.

To remove a User Group's permission, select the User Group in the "Groups with Permission" list, and click the left-pointing arrow between the two lists.

Moderator notification emails

Specify email addresses of moderator in the Notification Recipients box to receive a notification whenever a booking request is made for this resource.

back to top

Setting operation hours

Operation hours are the hours during the week when a facility is available for use. To set the hours of availability click the "Operation Hours" link to go to the Operation Hours section.

Resources may be available all the time, in which case the operation hours are "All hours". This is set as being available "From" 0:00 AM "To" 0:00 AM.

Alternatively, on some days of the week, a resource may only be available during certain hours. The times when it is available - "From" and "To" - then need to be specified.

If the hours of operation are the same for every day of the week, you can simply set the hours for Monday and then click "Copy Monday" to make the times for the rest of the week the same as those on Monday.

All hours

Initially, as the default, the operation hours for resources are set to "All Hours".

Set available times

To set the earliest available time for a resource, click the arrows to the right of the "From" box. To set the latest available time for the resource, click the arrows to the right of the "To" box. The available times are set in half-hour units.

To copy the times set for Monday to the other days of the week, click "Copy Monday".

To reset the times to the default, click "All Hours".

Days not available

To indicate that a resource is not available at all on a specific day of the week, click to clear the check box in the Available column. (For example, if the facility is unavailable over the weekend, click to clear the check boxes for Saturday and Sunday).

When you have finished setting the operation hours, click "Save".

back to top

Setting custom attributes

Each resource type has custom attributes which record attributes specific to the resource. (For example, a resource type called "Conference Room" could have the following custom attributes: Contact Person; Number of Network Points; Seating Capacity).

To go to the Custom attributes section click the "Custom Attributes" link.

Enter the requested information by selecting the appropriate check boxes, or typing the relevant data. Finally, click "Save".

back to top

Changing resource information

Click the "Admin" tab and select "Resource Set-up" in the view option bar. Select the specific resource in the resource list and click “Edit”. The "Resource Details" page will then be displayed with the details for the selected resource.

Do you want to:
Change general details
Change booking rights
Change viewing rights
Change operation hours
Change custom attributes
Delete resources

Changing general details

Click the "General Details" link to go to the General Details section. Make the required changes and then click "Save".
For more information on the General Details section, see Adding new resources.

Changing booking rights

Click the "Booking Rights" link to go to the Booking Rights section.
Make the required changes and then click "Save".
For more information on granting booking rights, see Granting booking rights.

Changing viewing rights

Click the "Viewing Rights" link to go to the Viewing Rights section. Make the required changes and then click "Save".
For more information on granting viewing rights, see Granting viewing rights.

Changing operation hours

Click the "Operation Hours" link to go to the Operation Hours section. Make the required changes and then click "Save".
For more information on setting operation hours, see Setting operation hours.

Changing custom attributes

Click the "Custom attributes" link to go to the Custom Attributes section. Custom attributes are defined for each resource type. This means that you can change the value of an attribute of a specific resource, but not the type of attribute. Make the required changes and then click "Save". For more information on custom attributes, see Setting custom attributes.

back to top

Deleting resources

When you delete a resource, all bookings for it are also removed; so delete resources with caution.

To delete a resource, select the resource and click "Delete" at the bottom of the "Resource Set-up" screen. A confirmation message is displayed after the resource has been deleted.

back to top

Resource Groups

What are resource groups?

Resources are arranged into Resource Groups, for example, departments or branches. You can also use any tailored method of categorizing that suits your organization, and name your resource groups accordingly. Resource groups often correspond to the physical arrangement of the various resources. By grouping resources as users visualize them, they can search for specific resources in a simple and logical way.

back to top

Resource grouping system

Users with the right to add resources need to know which grouping system has been chosen for your site. To set the system used for grouping resources, click the "Admin" tab and select "Modify Site Settings" in the view option bar. Type a description for the grouping system in the "Resource Location Group Name" box, for example, "Department", and click "Save".

back to top

Adding new resource groups

To add a new resource group, click the "Admin" tab and click “Add” button in the "Resource Location" section of Resource Setup. The "New Resource Location" page is then displayed.

In the "General Details" section, type the name of the new resource group in the "Name" box.

Resource group names must be unique and are restricted to 250 characters in length. They may not contain a double quotation mark (").

Type a description in the "Description" box. Save the information by clicking "Save".

back to top

Viewing resources in a resource group

Click the "Admin" tab and select the specific resource location group in the list and click “Edit”. The "Resource Location Details" page will then be displayed containing the details of the selected resource group. The "List of Facilities" section shows a list of facilities (resources) that belong to this Resource Location group.

For more information on how to allocate resources to a group, see Adding new resource groups.

back to top

Changing resource group details

Make the required changes and then click "Save".
For more information on the General Details section, see Adding new resource groups.

back to top

Deleting resource groups

To delete a resource group, select the group in the "Resource Location" section and click "Delete". A confirmation message is displayed after the resource location group has been deleted.

Important note: Resources do not have to belong to a Resource Location Group so deleting a resource group does not delete the resources in that group, it merely removes the group reference. First remove the group reference from the resource, otherwise you cannot delete the resource location group because it has resources assigned to it

[back to top]

Resource Types

What are resource types?

Resources are classified in different types (e.g. equipment or meeting rooms). When a new resource is added, its resource type is selected from the list of available resource types. This information is used to sort the resources in the resource list on the Book tab.

The default facility types are:

- Meeting rooms
- Parking garages
- Staff Resources
- Vehicles
- Other equipment

Additional resource types can be created by the Administrator.

[back to top]

Adding new resource types

To add a new resource type, click the "Admin" tab and in the Resource Setup section under Resource Types click “Add”. The "New Resource Type" page is displayed.

In the General Details section, type the name of the new resource type in the "Name" box.

Resource type names must be unique and are restricted to 250 characters in length. They may not contain a double quotation mark (").

EZBook caters for resources that are made up of various identical units that can each be booked separately (e.g. parking bays), and for a group of resources that are handled as a single, complete unit (e.g. a parking garage).

A resource type that is made up of various identical units that are each booked separately is called a collective resource type. You can use EZBook to automatically allocate a unit (e.g. the next available parking bay) or it is possible to request a specific unit.

A resource type that is a single, complete unit is called a stand-alone resource type. (For example, a meeting room is a stand-alone resource type).

To designate a resource type as a collective resource, select "Collective" in the "Configuration Type" drop-down list.

To designate a resource type as a stand-alone resource, select "Stand-Alone" in the "Configuration Type" drop-down list.

Type the description in the "Description" box and click "Save".

back to top

Editing resource types

Click the "Admin" tab and in the Resource Setup section under Resource Types, select the specific resource type in the list and click “Edit”. The "Edit Resource Type" page is then displayed with the details for the selected resource type.

Additional information is given in:
Add custom attributes to resource types
View resources of a specific resource type
Change resource type details
Change custom attributes
Delete custom attributes
Delete resource types

back to top

Adding custom attributes

The custom attributes feature allows you to specify information that should be included when adding a new resource of this resource type. (For example, a resource type called "Conference Room" might have the following custom attributes: Contact Person; Number of Network Points; Seating Capacity).

Click the "Custom Attributes" link to go to the Custom Attributes section. Click "Add" to open the "Add Custom Attribute" dialog box.

Name

Type the custom field name in the "Name" box.

(Custom field names must be unique and are restricted to 250 characters in length. They may not contain a double quotation mark (").

Type

There are three types of custom attributes:

- Text
- Numeric
- Yes/No

Select "Text" if the custom field is to contain information that must be typed in words. (For example, a custom field called "Location" might be given the following text: "3rd Floor next to Training Lab 103").

Select "Numeric" if the custom field is to contain information that must be typed in numbers. (For example, a custom field called "Seating Capacity" might be given the following number: "12").

Select "Yes/No" if the custom field is to contain information that must be recorded in a check box. (For example, a custom field called "Overhead Projector" will have the accompanying check box selected if the resource has an overhead projector).

Description

Type a description of the custom resource in the "Description" box.

Click "Save" to add the custom field.

[back to top]

Viewing resources of a specific resource type

The List of Facilities section, beneath Resource Type Limits, lists all the resources of this type, together with the resource group to which each resource belongs. For more information on Resource Groups, see What are resource groups?

back to top

Changing resource type details

Click the "Admin" tab and in the Resource Setup section under Resource Types, select the specific resource type in the list and click “Edit”. The "Edit Resource Type" page is then displayed with the details for the selected resource type. Make the required changes and then click "Save".

For more information on the General Details section, see Adding new resource types.

Changing custom attributes

Editing the custom attributes of a resource type will affect existing resources of that type. If you delete a custom attribute, the corresponding data in each resource of that type is removed. If you add a custom attribute, you must enter the details for it in each existing resource.

Click the "Custom Attributes" link to go to the Custom Attributes section. Select the specific custom attribute in the list. The details for the selected custom attribute are displayed in the "Edit Custom Attribute" dialog box.

Make the required changes and then click "Save". The custom attribute type, ("Text", "Numeric", "Yes/No") cannot be changed after the attribute has been added.

Deleting custom attributes

Click the "Custom Attributes" link to go to the Custom Attributes section. Select the custom attribute you want to delete and the "Edit Custom Attribute" dialog box is displayed. Now click "Delete" to delete the custom attribute.

back to top

Deleting resource types

To delete a resource type, first delete the resources in that type (you cannot delete a resource type if resources of that kind still exist). Select the resource type you want to delete and then click "Delete" at the bottom of the "Resources Types" section. A confirmation message is displayed after the resource type has been deleted.

back to top

User Groups

What are user groups?

A user group is a set of users. When booking or viewing rights are allocated to a user group, each member of the group acquires those rights. Users may be moved in and out of a group, when their roles in the organization change. In this way, the Administrator can avoid having to re-assign permissions to individual users.

For example, the Administrator may create a user group called "Training" and give it exclusive rights to book training rooms. When new trainers are employed, they are added to this user group and are thus automatically given the right to book training rooms.

back to top

Adding new user groups

To add a new user group, click the "Admin" tab and in the User Setup in the User Group section, click “Add”. The "New User Group" page is displayed. In the General Details section, type the name of the new user group in the "Name" box. User group names must be unique and are restricted to 250 characters in length and these may not contain a double quotation mark ("). You may optionally type a descriptive paragraph about the user group in the "Description" box. Then submit the information by clicking "Save".

back to top

Adding users to user groups

Click the "Admin" tab and in the User Setup in the User Group section, select the specific user group in the list and click “Edit”. The details of the selected user group are displayed on the "User Group Details" page.

To add users to the group click the "User Membership" link to go to the Membership section. To add a user to the group, select the user in the "Available (Non-Members)" list.
A user can belong to one or more groups.
(Tip: To select more than one user, click the first name in the list, and hold down the CTRL key while making further selections).

Move the user name or names into the "Members" list by clicking the right-pointing arrow between the two lists. To remove a user from the user group, select the user in the "Members" list, and click the left-pointing arrow between the two lists. When you have finished assigning users to the user group, click "Save".

back to top

Changing user group membership

Click the "Admin" tab and in the User Setup in the User Group section, select the specific user group in the list and click “Edit”. The details of the selected user group are displayed on the "User Group Details" page. Make the required changes and then click "Save".
For information on adding users to user groups, see Group Membership.

back to top

Deleting user groups

Click the "Admin" tab and in the User Setup in the User Group section, select the specific user group in the list and click “Delete”. A confirmation message is displayed after the user group has been deleted.

Important note: Deleting a user group does not delete the users in the group.

back to top

System Settings

Displaying the full organization name

The full name of your organization is displayed on your logon page and in the browser title bar.

To specify the full name, click the "Admin" tab, and select "Modify Site Settings" in the view option bar. Type the full organization name in the "Full Organization Name" box. The name may have a maximum length of 250 alphanumeric characters.

back to top

Linking to your Home page

You can put a link to your organization's web site, Intranet site or any other web page on your EZBook logon page.

To create a link to a web site on your logon page, click the "Admin" tab, and select "Modify Site Settings" in the view option bar. Type the full URL of the site you'd like to link to in the "Organization URL" box.

back to top

Allowing users to self-register

For information on self-registration, see Adding new users.

Users can be added individually by the Administrator, or can be allowed to self-register. To allow users to self-register, click the "Admin" tab, and select "Modify Site Settings " in the view option bar. Select the "Allow users to self-register" check box. Type the self-registration password in the "Password" box.

Important: When notifying users that they need to register themselves on EZBook, remember to provide them with the self-registration password.

back to top