

User Help Guide

Setting up EZBook

Overview

Setting up EZBook for your organization first requires someone to be designated as the Administrator.

Then there are two simple jobs for the Administrator:

1. Set up the resources that are to be booked and
2. Set up the users' names (and passwords) and allocate their rights.

This will take just a few minutes, after which you can use EZBook for booking and scheduling immediately.

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Types of Users

There are two types of users:

Administrator Users

- They have 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 one or two.
- They set up the firm's EZBook system, define the facilities and descriptions, and allocate the level of rights for General Users.

General Users

- Their rights are limited. The Administrator can grant them booking and/or viewing rights for individual resources. In addition they can be granted limited administrative rights.

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Accessing your site

Initially, until the Administrator has set up the booking site, logging-on to EZBook is done by visiting the main web site: <http://new.ezbook.com/>

At this stage you can do the demo and explore the site to examine EZBook's features.

As soon as the Administrator has finished setting up the specific EZBook site for your organization, you can visit your site using your own address:

<http://new.ezbook.com/yourcompanyname>

To protect from unauthorized access each user is given a User Name and a Password, with which the user can access the BOOKING PAGE directly.

Logging on

- Complete the "Logon Name" box
- (TAB to move the cursor)
- Complete the "Password" box
- Click "Logon"

See also:

[Password rules](#)

[Changing your password](#)

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Booking Page

Overview

The BOOKING PAGE is headed with the tabs: "Book", "Find" and "Admin". It is the core of the booking system.

To make a booking, you: (1) select the resource from the Resource List, (2) choose the date, (3) choose the time, and then (4) confirm the booking.

To make it really simple to use there is a "Quick Book" button, which can automatically enter some details for you, if your booking times can be rounded to the nearest half-hour.

In the more general situation, if the booking times do not coincide with the half-hours, if there are repeat bookings or to access customized options use the Detailed Book button.

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Resource List

Resources are displayed according to Groups and Types selected by the Administrator. You will only see resources for which you have been granted viewing and/or booking rights. A user who has only been given viewing rights (and not booking rights) to a resource, will be able to read the booking schedule, but will not be able to make bookings.

If the resource list is too long to fit on the screen, use the scroll bar on the right of the "Choose a resource" panel to alter the view. Resource types are automatically displayed in an expanded format. You can click the appropriate resource type bar to expand or collapse the list.

Selecting the Resource Group

If the resources have been arranged in Groups by your Administrator (as would be the case when separating the resources of different branches of an organization), the "Category" box is automatically displayed on the BOOKING PAGE.

To view the complete resource list, click the arrow to the right of this box and select "All" from the drop-down list.

If you want to see the resources available for a specific group (e.g. Head Office), click the arrow to the right of the box and select the appropriate Group.

Selecting the Resource Type

Resources are displayed according to their types, as set up by the Administrator. Resource types are automatically displayed in an expanded format and you can click the appropriate resource type bar to expand or collapse the list.

Selecting the individual resource

To select a resource, click on it. If a description was entered by the Administrator, it can be viewed in a ToolTip by moving the mouse pointer over the resource name.

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Specifying the date and time

Selecting a Date on the Calendar

When you open the booking page the current date is highlighted in orange on the booking schedule calendar.

To select a new date, point to it and click once with the left mouse button. The selected date will be highlighted in orange, and the corresponding schedule or booking list will appear in the "Choose a time" panel.

To view the previous month, click the arrow to the left of the month name on the calendar. To view the next month, click the arrow to the right. To return to the current date, click "Go to today" at the bottom of the calendar.

Selecting a Time from the Schedule

Schedules for each day are displayed in half-hour slots (portions of half-an-hour each), which are shaded blue if they have been booked, white if still available and gray if they are outside available booking hours. (Available booking hours are defined by the Administrator).

Each full slot represents half an hour, so for example to book a one-hour session you will need to select two slots. (Shorter intervals than half-an-hour can later be specified in the "New Booking" dialog box by changing the "From" and "To" boxes).

When you point to a booking slot with the mouse, a ToolTip appears. If the slot is available, the ToolTip reads "Free". If the slot is booked, the ToolTip displays the time and description of the booking, and the name of the user who has made the booking.

To select the time for a booking, point to the appropriate slot and click once to highlight it. Drag the mouse to select adjacent slots. (Once selected, they will appear highlighted in light grey. Later, when the booking is confirmed by the system, it changes to blue).

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Viewing Options for the Schedule

You can specify the type of booking information you want to see on the day view of the schedule. To open the "Schedule Preferences" dialog box, click "Preferences" on the far left of the view option bar. Select the view option you want and click "Save".

The booking schedule can be displayed as individual days or as a view of an entire week. To change the display format, click "Day View" or "Week View" on the view option bar.

Current bookings for the day or week can be displayed in a list. To view the list of current bookings, click "List" in the view option bar. To view the booking schedule again, click "Schedule" in the view option bar.

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Confirming the Booking

There are two ways of confirming the booking. You can either use the "Quick Book" button which automatically enters the details for you after you've selected the required time slot, or you can type additional information, such as the purpose of the booking or short notes, in the "Detailed Booking" dialog box.

Quick Book

The Quick Book feature is used to speed up booking where booking slots are in half-hour increments. Quick Book allows the whole booking operation to be completed in just a few seconds. (If the times are not in 30-minute increments, you will need to use the Detailed Book feature).

You will notice that the booking description, next to the word "for" in the Book panel is automatically filled in with your "user name". If you want to change this information just overtype the user name. Some users type the booking description here (e.g. "seminar", "demo", "training" etc.).

To use Quick Book, just select the resource, date and time; then enter the description and click "Quick Book" to confirm the booking.

Detailed Book

Use the Detailed Book button (as the alternative to Quick Book - which is for half-hour slots only) to confirm bookings in the general situation if booking times do not coincide with the half-hours, if there are repeat bookings or you need to access more general options.

To use the "Detailed Book" feature select the resource and date. Then click "Detailed Book" in the Book panel. (Hint: If you select a booking slot near your chosen time before you click the button, EZBook will fill in that start time in the dialog box, which will save you a few seconds).

In the "Booking" dialog box, you can adjust the start and end times by clicking the arrows next to the "From" and "To" boxes, or you can over-type. Then type the booking description you want displayed on the schedule in the "For" box (e.g. Management Meeting). Type any extra details you want included with the booking in the "Additional Info" box. Finally, click "Book" at the bottom of the dialog box.

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Making Recurring Bookings

You can use the "Detailed Book Dialog Box" to make bookings that occur regularly at daily, weekly or other intervals. See [Detailed Book](#).

Click the "Repeat this Booking?" check box in the Recurrence panel. Specify whether the repeat is daily, weekly or monthly by clicking the relevant option button.

Daily

Type the recurring interval in days, in the "Every Days" box. (e.g. If the booking is to recur every three days, type the number "3" in the box).

Weekly

Type the recurring interval in weeks, in the "Every Weeks on" box, and select the day of the week when it is to recur. (e.g. if the booking is to recur every four weeks on a Monday, type the number "4" in the box and select Monday from the list). You can select more than 1 day of the week for your booking by holding down the SHIFT or CTRL key while clicking (e.g. for a booking that recurs every week on a Monday and a Wednesday).

Monthly

If you want the booking to recur on the same **date** of every month, click the "Day of every month(s)" option button. Type the day of the month that the booking is to recur in the "Day month(s)" box. (e.g. If the booking is to recur on the 1st of the month for six months, type the number "1" in the "Day month(s)" box). If you want the booking to recur on the same day-of-the-week of every month, click "The day of every month(s)" option button. Select the occurrence of that day in the month (e.g. "first") in the "The month(s)" box. (e.g. If the booking is to recur on the first Monday of the month for six months, select "first" and then "Monday", and type the number "6" in the "of every month(s)" box).

Confirming Recurring Bookings

After choosing your options, specify the end date by clicking the arrow next to the "until" box, and selecting the relevant date on the calendar.

Finally click "Book" button to confirm the recurring booking.

After making a recurring booking, EZBook displays a list of successful bookings and identifies any that failed. To continue, click "Close" on the "Booking" dialog box.

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Booking Collective Resources

EZBook provides for collective resources, which are made up of several similar units that can be booked separately. You would use the collective resources feature to control the booking of a group of squash courts, a parking garage, or a block of parking bays if you wanted to administer them collectively and allocate them separately.

If you want to book a unit in a collective resource you can select a specific unit (e.g. Parking Bay 1), or you can let EZBook allocate the next available unit automatically.

To book one item (e.g. a parking bay) from a collective resource (e.g. a parking garage); select the collective resource from EZBook's resources panel. You will notice that above the schedule

a drop-down list of the resource items appears (as "Show schedule for..."). If you want EZBook to allocate you a unit automatically, select "All" in the drop-down list.

Select the date and time, and book in the normal way (See [Quick Book](#) and [Detailed Book](#)).

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Changing Booking Details

Changing Single Bookings

Select the relevant resource in the resources list, and the date of the booking on the calendar. Point to the relevant booking in the schedule, and click the left mouse button once to open the "Edit Booking" dialog box.

In the "Edit Booking" dialog box, you can adjust the start and end times by clicking the arrows next to the "From" and "To" boxes.

You can also change the text in the "For" box and in the "Additional Info" box. To register the changes click the "Update" button. A confirmation message will be displayed, which must be closed to enable you to proceed.

Changing Recurring Bookings

You can make changes to any one of a series of recurring bookings, by selecting an individual booking and treating it as a [single booking](#).

If you want to make changes to all elements of a recurring booking, first delete the whole series of recurring bookings and then make a new recurring booking with the changed information.

Select the relevant resource in the resources list, and the date on the calendar. Point to the relevant booking in the schedule, click the left mouse button once to open the "Edit Booking" dialog box. Click the "Delete Series" button. After the confirmation message has been displayed, click the "Close" button to proceed. To remake the booking, see "[Making Recurring bookings](#)".

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Deleting Bookings

Deleting Single Bookings

Select the relevant resource in the resources list, and then select the date of the booking on the calendar. Point to the relevant booking in the schedule, and click the left mouse button once to open the "Edit Booking" dialog box. Click the "Delete" button, and after the confirmation message has displayed, click the "Close" button to proceed.

Deleting Recurring Bookings

Select the resource from the resources list and then select the date of the booking on the calendar. Point to the relevant booking in the schedule, and click the left mouse button once to open the "Edit Booking" dialog box. Click the "Delete Series" button, and after the confirmation message has displayed, click the "Close" button to proceed.

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Find Functionality

Overview

To search the booking record to check the availability of facilities, available times and existing bookings, click on the "Find" tab at the top of the Booking Page.

"Find" provides three search functions each of which can operate in "simple" or "advanced" modes. The functions are:

Find an available time slot provides a search for available booking times that match specific needs

Locate an existing booking allows you to trace an existing booking

Find a resource by name or features match allows you to find resources set up on your EZBook site that has features to match your requirements.

It should be noted that for all Find functions the text searches are not case-sensitive (i.e. words starting with capitals and small letters are treated as being the same).

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Find an Available Time Slot

Use the *Simple* Time Search if you merely want to find the next time available to book a certain type of resource (e.g. any meeting room) for a specified number of hours.

Use the *Advanced* Time Search if you are investigating the availability of a specific resource (e.g. The Main Boardroom), over a specified time period or if you wish to investigate the simultaneous availability of a group of resources together.

Simple Time Search

Finds the next available facility.

Click the "Find" tab and select "Find an available time slot" in the left panel and the "Simple" button on the view option bar.

Select the type of resource needed from the Find the next available drop-down list (e.g. if you are searching for any meeting room, select "Meeting rooms"). Specify the number of hours for the booking by clicking the arrows at the "For at least Hours" box.

Click the "Go" button to start the search.

EZBook reports on the next available resources for the required duration in the Search Results page. If none of the results is acceptable, you can advance to the next half-hour by clicking the button or you can click the "Search again" button to refine your options.

You can book the resource directly from the "Search Results" screen by selecting it and clicking. A "[New Booking](#)" Dialog Box opens and you book in the normal way.

Advanced Time Search

Provides custom searches based on a selection of resources and specified time ranges.

Choosing resources for the advanced time search

Click the "Find" tab and choose "Find an available time slot" in the left panel and "Advanced" on the view option bar.

If you want to book any one of the selected resources (e.g. Boardroom 1 or Boardroom 2), select "Any one" from the "I need of the resources chosen below" drop-down list. Otherwise,

if you want to search for a time when all the selected resources are available **simultaneously**, select "All" from the "I need of the resources chosen below" drop-down list.

Click on a resource in the box to include it in your search or use the "*Select All*" button.

Specifying the time range

Specify the range of dates that you want your booking to fall within. Select the start date by clicking the arrow to the right of the "*Between*

 box and selecting the date from the calendar. Select the last date by clicking the arrow to the right of the "*and* box and selecting the date.

Specify the number of hours that you require the resource (or resources) by clicking the arrows next to the "I need the booking for at least Hours" box.

Specify the earliest time of day that the booking can start by clicking the arrows next to "The booking must not start before

 box. Also, specify the latest time that the booking can end by clicking the arrows next to "The booking must not end after box.

After you have entered the criteria for your search, click the "Go" button to see a list of available times in the "Search Results" screen. If the search results are not suitable, click the "Search again" button to refine your options.

You can book the facility directly from the list in the "Search Results" screen. If you chose the "Select All" option, you can book all the facilities together in one booking screen. Click the available time that you want to use for your booking. The "New Booking" dialog box opens and you can book the resource (or resources) in the normal way.

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Locate an Existing Booking

Use the **Simple** Booking Search to find bookings based on their descriptions or additional information you know may have been entered.

With the **Advanced** Booking Search you are able to limit the search to bookings made for a particular resource and/or bookings that were made by particular users. You can also specify a date range to narrow the results further.

Simple Booking Search

- Click the "Find" tab and choose "Locate an existing booking" in the left panel and click the "Simple" button on the view option bar.
- Type the text you want to base the search on, in the "Find" text box.
- You can search for specified text in an existing booking's description and/or in an existing booking's additional information, by checking the relevant "In the Booking Description" or the "In the Additional Information" boxes.
- Click the "Go" button to start the search.

Advanced Booking Search

The advanced booking search allows you to search for existing bookings using more complex criteria.

- Click the "Find" tab and choose "Locate an existing booking" in the left panel and "Advanced" on the view option bar.
- If you want to search for text in the booking description or additional information, follow the same procedure as in the Standard Booking Search.
- To limit the search to a particular resource's bookings, change the "Search the bookings made for" drop-down list option from "All Resources" and select that option from the list that has relevance.
- If you know who made the booking you can narrow the search by selecting the user's name from the "Search the bookings made by" drop-down list. Otherwise, leave "All Users" selected.
- If you have a rough idea of when the booking was made, you can narrow the search by excluding days outside the relevant time period. Click the arrow next to the "Exclude bookings before" box and select the start date in the calendar box. Then select the end date in the "Exclude bookings after" box.
- Click the "Go" button to start the search.

A list of matching bookings appears on the "Search Results" screen. If you do not find the booking you are searching for in the list, click the "Search again" button to refine your options.

To examine any booking detail, click on it. This will take you to the "Edit Booking" dialog box to show you the other detail.

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Find a Resource

Use the **Standard** Resource search if you want to search for a facility by its name or part of it (e.g. "conf"), or by text contained in its description (e.g. "Formal Boardroom"). The **Advanced** Resource Search allows you to search for a resource in a specific resource group (e.g. a conference room at Head Office), or to find a resource with specific attributes (e.g. a conference room at Head Office that seats 20 people).

Simple Resource Search

- Click the "Find" tab on the main booking page and choose "Find a resource by name or features match" in the left panel and "Simple" button on the view option bar.
- Type in the text for the search, in the "Find" text box.
- If you want to search for text in the resource names or descriptions, check the "In the resource name" or "In the resource description", or both.
- Click the "Go" button to start the search.

Advanced Resource Search

- Click the "Find" tab on the main booking page and choose "Find a resource by name or features match" in the left panel and "Advanced" button on the view option bar.
- If you want to search for text in the resource name or description, follow the same procedure as the in Standard Resource Search.
- To narrow the search to only resources in a specific facility group, select the particular group in the "Find any resources in" drop-down list. If you want to find resources regardless of their grouping, leave "All Groups" selected.
- You may want search for a specific type of resource, (e.g. a meeting room). To do this, select the resource type in the "of this type" drop-down list.

- If you do limit the search to one type of resource you can also include values for custom attributes that must be matched in the search. (e.g. You can search for a conference room that seats at least ten people).
- In the "Custom Attributes" section, select the check boxes under "Search" that correspond to the attributes you want. Select the appropriate option in the "Condition" drop-down list and type the corresponding value in the "Value" box.
- Click the "Go" button to start the search.

A list of matching resources appears on the "Search Results" screen. If you do not find one that meets your requirements, click the "Search again" button to refine your options.

To book or view the schedule of a resource from the results list, click the resource name to go directly to the booking schedule for that resource (or the unit of the resource, in the case of Collective Resources).

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Maintaining User Details

Changing your Password

- Click "Password" in the view option bar of the "Book" tab, to open the "Change Password" dialog box.
- Type your current password into the "Old Password" box. (Note: passwords are case sensitive)
- Type your password in the "New Password" box.
- Confirm the spelling by typing the new password in the "Confirm Password" box.
- Click the "Update" button

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Password Rules

EZBook passwords have a maximum length of 10 alphabetic characters and/or numerals and are case sensitive (i.e. Capital letters and small letters are treated differently).

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Creating Reports of Bookings

Advanced Booking Search

The Advanced Booking Search can be used to view many different customized lists of bookings.

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My Bookings

There is also a simple "My Bookings" report that will list bookings you have made within a specified time period.

- Click "My Bookings" in the view option bar of the "Book" tab, to open the "My Bookings" dialog box.
- Select "Next" or "Past" in the list box
- Select the number of months for the report from the reporting period list.
- Then click the "Go" button.

You may view more details on any one of the bookings by clicking on the item in the list. To print the booking list, click the "Print" button on the bottom of the dialog box.

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Support

Use the support contact list to get help from your internal Administrators (e.g. for site administration questions, etc) or technical support from **EZBook.com** directly.

- To load the "Help Window", click "Help!" on the view option bar of the any one of the tabs (Book, Find or Admin)
- Click the "Support" link in the top bar of the Help Dialog. This displays a list of your Administrators as well as EZbook.com contact addresses.
- Select the type of support you require, from the dropdown list.
- In the contact list below, click on the name you'd like to contact. The "Send a Support Request" dialog will appear.
- Complete the fields detailing your problem or question.
- Click the "Send Now" button.

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