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1. INTRODUCTION:

Configuring EZBook requires the Administrator to manage two elements:

Users: The staff or members of an organization that will use EZBook for booking purposes.

Resources: The facilities, venues, equipment etc. that the EZBook Users would schedule.

There are two tiers of Users:

- **Users (individuals):** - There are two categories of Users:

General User: - most Users of the system within an organization would be General Users, either all staff or selected members who require access to the system to view and/or make bookings. General Users can also be assigned rights to: manage Users, manage Resources, manage System settings and Cancel existing bookings made by other Users. A General User can be assigned any or all of these rights (Note: if given all rights, the General User automatically becomes an Administrator).

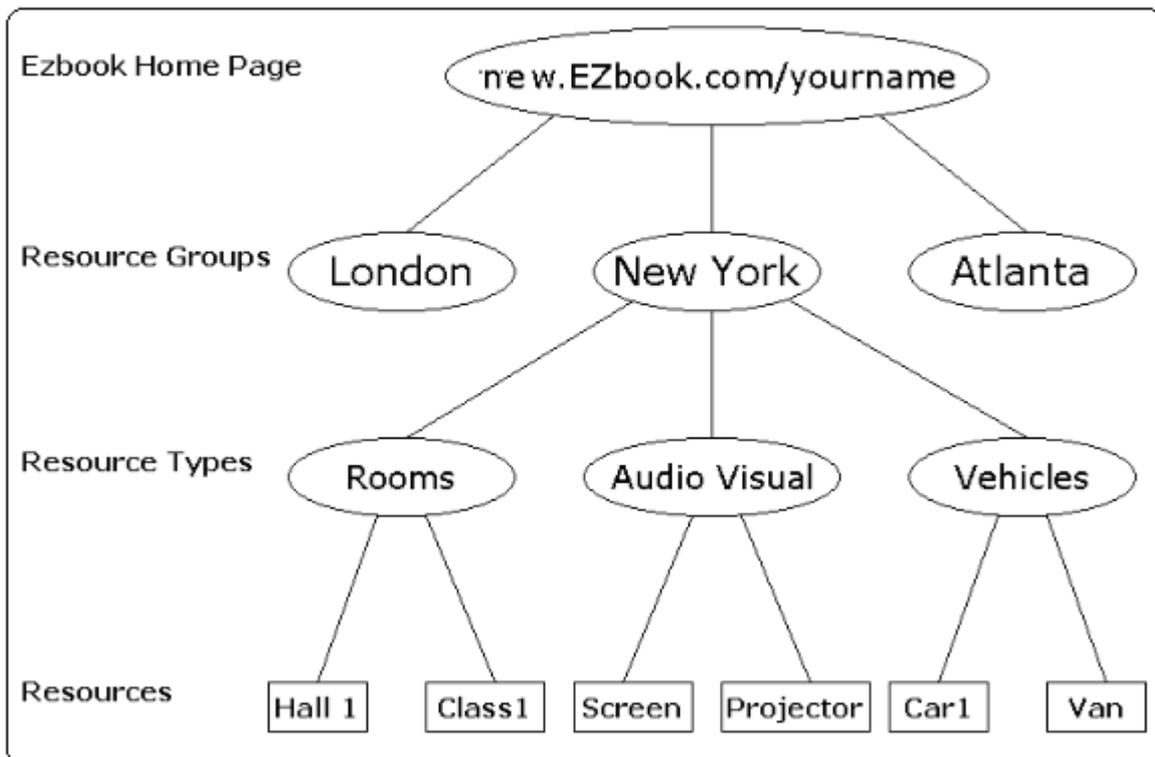
Administrative User: - A site can have one or more Administrators, but it is recommended that this number be kept to a minimum as an Administrator has full rights over the system.

- **User Groups:** - typically departments or functional groups e.g. Management, Accounts, Sales, IT, Operations etc.

There are three tiers of resources:

- **Resource Groups:** - typically locations of branches of your company (eg. Atlanta, New York or Boston), or departments responsible for different resources.
- **Resource Types:** - categories of resources such as Meeting Rooms, Equipment, Staff, Vehicles, etc.
- **Resources:** - each with its own calendar to be individually scheduled (Meeting Room 1, Meeting Room 2, Projector, Trainer # 1, Delivery truck, etc.)

The diagram below gives an illustration of how resources groups, types and resources can be visualized:



Note: There is a further division within **resources** between '**stand-alone**' (such as an individual room or piece of equipment) and '**collective**'. **Collective** allows configuration of a number of identical resources by '**sub-facilities**', allowing a different name and calendar for each, but under a single '**resource**'. (Such as parking spaces identified by numbers or identical 'pool' cell phones / vehicles that could be identified by serial or registration number.) The key here is that the items under 'collective'

must have identical features and attributes. This option minimizes the need to create all resources individually and when booking these a User has an option to select '**Any**' one of the sub-facilities.

To configure EZBook for your organization there are three stages that must be completed:

Stage 1: Create your site and configure your organization's details

Stage 2: Enter your Users and configure their rights and groups

Stage 3: Create Resource groups, types and resources.

2. STAGE 1 - CREATE YOUR SITE AND CONFIGURE YOUR ORGANIZATION'S DETAILS

Note: The User that initially creates the site is automatically made the first Administrator, but this can be changed later where this role can be re-assigned to another User.

2.1 CREATING YOUR EZBOOK SITE

The procedure to create a EZBook site is given below:

- Select '**Free Trial**' on new.EZBook.com.
- Enter required information on '**Site Creation Details**' page.

Your Site Name - should be a short name describing the company or organization - this forms the URL or website address - e.g. new.EZBook.com/yoursitename

Personal Logon name - logon name of choice

Password & Password Confirmation - password of choice

Email - this is required as the system uses this address to confirm details of the site registration

How did you hear of EZBook - information relating to where you heard about EZBook?

- Select '**I Agree**' after reading the Terms and Conditions
- Select '**Submit**' and the system will create the site for the organization, based on the details supplied.

Using your chosen URL automatically created, you can now logon to your organization's private EZBook website.

Note: After the site has been created, some thought has to go into planning how the User options and

resources are going to be configured. This is based on the business processes unique to each organization. There are some guidelines as to what needs to be considered. This process can be determined by posing a series of questions, the answers of which are used to establish the site configuration. Any and all of these details can be altered at any stage.

2.2 CONFIGURING SITE SETTINGS

Configure your organization's settings by selecting **Configure System Settings** on the **Admin** page. To guide you through the configuration of your system settings ask yourself the following questions:

Do we want a link to our company website?

Organization URL can be added to add a link to your company's existing website address. This link will appear on your EZBook home page.

How will User information be captured?

Decide how you are going to set up your User list. Either the Administrator can add each Users details, or the system setting '**Allow Users to self register**' can be selected, either with, or without a password requirement. If the self-register option is selected, staff can add their own details to the system and will be automatically assigned the lowest level of rights. This option can be removed later when the staff members have registered themselves, and the level of rights can be altered later for individual Users as needed.

How do we want the Resource Groups described?

The **Facility Group Name** entered here will appear on the Booking page above the resource list as the title of the drop-down list to select all or specific resource group lists. Common descriptions include Sections, Departments, Workgroups etc.

3. STAGE 2: ENTER YOUR USERS AND CONFIGURE THEIR RIGHTS AND GROUPS

This stage involves creating a User list and User Group list.

3.1 USER LISTS

When creating the User list ask yourself the following questions:

Which members of our organization need access to the EZBook site?

List all the organization staff members. Include email addresses wherever possible for easy notification options. For effective use it is recommended that as many staff members as possible have access to the system. You can always limit their rights to view or make reservations, but the system works best when all parties likely to use the resources have access to the system. User accounts can always be deleted later if need be.

What rights do the General Users have?

On the User list you have made, decide what level of rights would be effective for them on an individual basis. You can assign specific rights to each User and may decide that certain Users can manage and configure resources that may be in their department, or may be given the right to cancel reservations made by other Users. Further viewing and reservation rights can also be set within the specific resource configuration. (See Section 4.3)

Who should be Administrators?

Decide who should have Administrative capabilities within the system. There should be at least one, but there can be many. It is recommended that you limit the number of Administrators, as these Users will have full system rights.

What groups (if any) do these Users fall into?

Procedurally, it is better to set up the Users first, and then the User Groups, but after the groups are configured, a User can belong to one or more User Groups, and these memberships can be changed at any time as required. This '**Group Membership**' field will not appear until the User Groups have been configured. (See Section 3.2)

3.2 USER GROUPS

User Group list should be determined on the basis of the following question:

What User groups are needed (if any)?

Decide how to group the Users and list these groups. Your site does not have to be configured with User groups, but this does allow for easier rights management, by allowing you to assign whole groups access rights to view and/or reserve a specific resource, instead of having to assign individual Users these rights. Any User can belong to one or more User Groups. For example if the duty of making meeting room bookings is the function of the department secretary in your organization, you may create a group called 'Secretaries' with right to make and cancel bookings.

4. STAGE 3: CREATE RESOURCE GROUPS, TYPES AND RESOURCES.

This stage involves setting up the Resource Group list, the Resource Type list and the Resources list.

4.1 RESOURCES GROUPS

Resource Group list can be determined by asking the following questions:

What Resource groups are needed (if any)?

Decide how to group the resources and list these groups. Your site does not have to be configured with resource groups, but if you have more than one office, in different locations, the resources can be grouped according to each office location for easy referencing. e.g. Groups could be Atlanta, New York, Boston etc.

If you have only one office, groups may also be departments within the organization responsible for the resources assigned to them; i.e. Equipment and vehicle resources may be the responsibility of the Operations Dept, while Staff resources may be grouped under HR Dept and meeting room facilities under the Admin Dept. Users can opt to see resource groups selectively, on the Booking page, by choosing that group from the drop-down box located above the resource list.

4.2 RESOURCE TYPES

Resource Type list can be determined by the following questions:

What Resource types are needed?

Decide what types of resources you have and list these. Your site does not have to be configured with resource types, but if you have more than one sort of resource these can be grouped according to their 'type' for easy referencing. I.e. Types could be Meeting Rooms, Equipment, Vehicles, Staff, or any 'type' your organization needs to describe.

What attributes could the resource types have?

List all the 'attributes' that individual resources within these resource types may have. I.e. Meeting Room resource type attributes may include: seating capacity, whether there is built-in audiovisual equipment, blinds, whiteboard, number of power points available, who needs to be contacted. Etc. These attributes can either be a 'text' field, yes/no (Boolean) checkbox or a numeric field.

Will the resource type be 'stand-alone' or 'collective'?

See 'Note' under Section 1 above.

4.3 RESOURCE LISTS

The resource list comprises of all the individual resources. When compiling this list ask the following questions:

What Resources are available for reservation?

List all the resources available for reservation. Resources must have unique names within a resource group.

What further information about the resource can be provided?

Enter any further info about the resource that will need to be quickly accessed in the 'description' field. This will be seen as a **tool tip** where the facility is listed on the Booking page on mouse over.

What type of resource is this?

This is where you can select the resource type which best describes this resource. These 'types' should have already been set up, with custom attributes. Once the resource type has been selected, the attributes list will appear below and these fields can be filled as necessary.

NOTE: This selection CANNOT be changed later, so take care that the correct resource type is selected. If there is an error, a new resource will need to be created in order to select the correct type, and the incorrect one deleted.

Does the resource belong to a group?

This is where you can select which 'group' the resource falls into, if these groups have been set up. If there are no resource groups configured, this field will not appear.

Does the resource have sub-resources?

If the 'collective' resource configuration was selected when setting up the resource type, additional fields will appear to name individual sub-resources. The drop-down box listing these sub-resources will appear above the time schedule graphic on the right-hand-side of the Booking Page when this resource is selected.

Who will have reservation (booking) rights?

Decide which Users or User groups should have rights to reserve the individual resources. These individual Users or User Groups can be selected from a list for each resource.

Who will have viewing rights?

Rights can be assigned to Users to be able to see resources selectively. Decide which Users or User groups should have rights to view the individual resources. These individual Users or User Groups can be selected from a list for each resource.

When will the resource be available?

Weekly operation hours can be set specifically to indicate when a resource is available for use.

What specific attributes does this resource have?

Based on the custom attributes set up in the Resource Type configuration, list what the specific resource attributes are for each resource. When Users need resources with specific attributes, they can search for these attributes on the '**Find**' page, using the '**Find a resource (facility) by name or features match**' option.

Once you have suitably configured your site according to the options above, your EZBook site is now ready for use by your organization.