



Resource Schedule User Guide



Configuring and managing resource reservations
for Space Management's bookable resources

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Overview

Resource Scheduling allows you and your tenants to reserve meeting areas and other space resources through an interactive calendar that includes detailed availability descriptions. This module functions through bookable resources that are configured within Space Management.

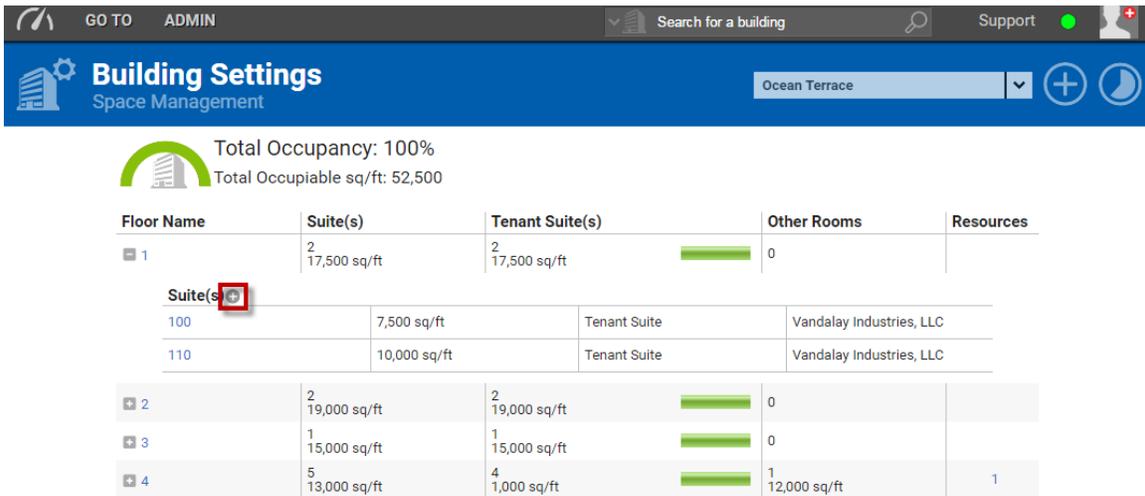
Property Managers may control advanced registration rules, configure settings for individual spaces, approve reservations, and manage resource tasks and tenant billing.

Creating a Bookable Resource

This section describes the process of creating a new bookable resource. Common examples of bookable resources include conference rooms, loading docks, and freight elevators.

To create a bookable resource:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Click the  that corresponds to the floor you want to add a suite to.
4. Click the Add Suite icon .



Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft		0
	Suite(s) 			
	100	7,500 sq/ft	Tenant Suite	Vandalay Industries, LLC
	110	10,000 sq/ft	Tenant Suite	Vandalay Industries, LLC
2	2 19,000 sq/ft	2 19,000 sq/ft		0
3	1 15,000 sq/ft	1 15,000 sq/ft		0
4	5 13,000 sq/ft	4 1,000 sq/ft		1 12,000 sq/ft

5. Enter the Resource **Name**.
6. (Optional) Enter the square footage.
7. Select the room type as **Meeting Area** or **Freight Area**.
8. Click **SAVE**.

9. After the resource has been saved, click the hyperlinked **Meeting Area or Freight Area**.

Building Settings
Space Management

Ocean Terrace

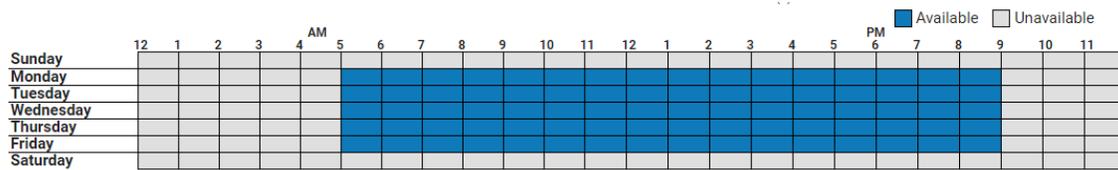
Total Occupancy: 100%
Total Occupiable sq/ft: 52,500

Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft	0	
2	2 19,000 sq/ft	2 19,000 sq/ft	0	
3	1 15,000 sq/ft	1 15,000 sq/ft	0	
4	5 13,000 sq/ft	4 1,000 sq/ft	1 12,000 sq/ft	1

Suite(s)	Area	Tenant	Resource
400	250 sq/ft	Tenant Suite	Vandalay Industries, LLC
410	250 sq/ft	Tenant Suite	Vandalay Industries, LLC
420	250 sq/ft	Tenant Suite	Vandalay Industries, LLC
430	250 sq/ft	Tenant Suite	Vandalay Industries, LLC
4th Floor Conference Room	12,000 sq/ft	Meeting Area	

10. Click **This resource can be reserved** option.

11. Using the Availability grid, select the hours that the resource is available for reservation.



12. The following settings are optional:

- a. **Max Capacity, Photo, and Description:** These details are displayed to tenants when they make a reservation request.
- b. **Amenities:** Add amenities to allow tenants to select from a list of items when booking a resource. These may carry associated costs, or be complimentary. Amenities marked as required will be added to every reservation for the resource.
- c. **Prevent Tenants from Reserving this Resource:** This option only allows employees of the Property Management Company to book the resource.
- d. **Auto Approve Reservations:** Reservations made for this resource are automatically moved to the Approved status as long as the space is available during the requested time.
- e. **Create Work Order to Manage Tasks and Billing:** This option automatically creates a work order to manage the tasks and charges

associated with a resource reservation. System Administrators can designate when work orders are created in relation to the date of the reservation.

- f. **This resource has a billable cost:** This setting allows an hourly rate to be designated for the resource. Resources with a billable rate automatically generate a work order with the associated charge. All room fees are calculated on an hourly basis. Optionally, a Daily Rate Cap may be entered, which represents the largest possible fee for reserving a resource for an entire day.

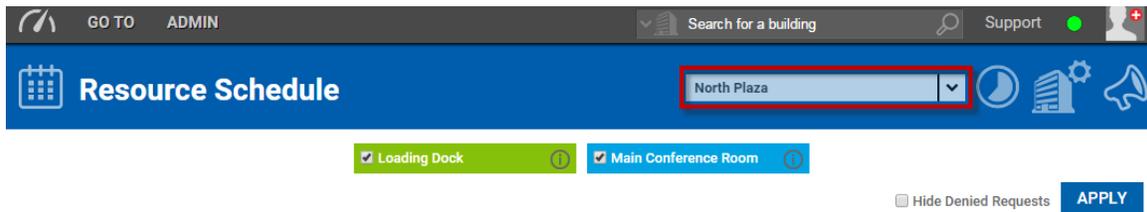
13. Click **SAVE** to finish creating the resource.

Viewing Bookable Resources

This section describes how to locate your bookable resources and view their availability.

To locate the bookable resources in a building:

1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.



3. Building Resources are displayed across the top of the calendar.

To view a resource's availability:

1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.
3. Use the calendar to view Resource availability.

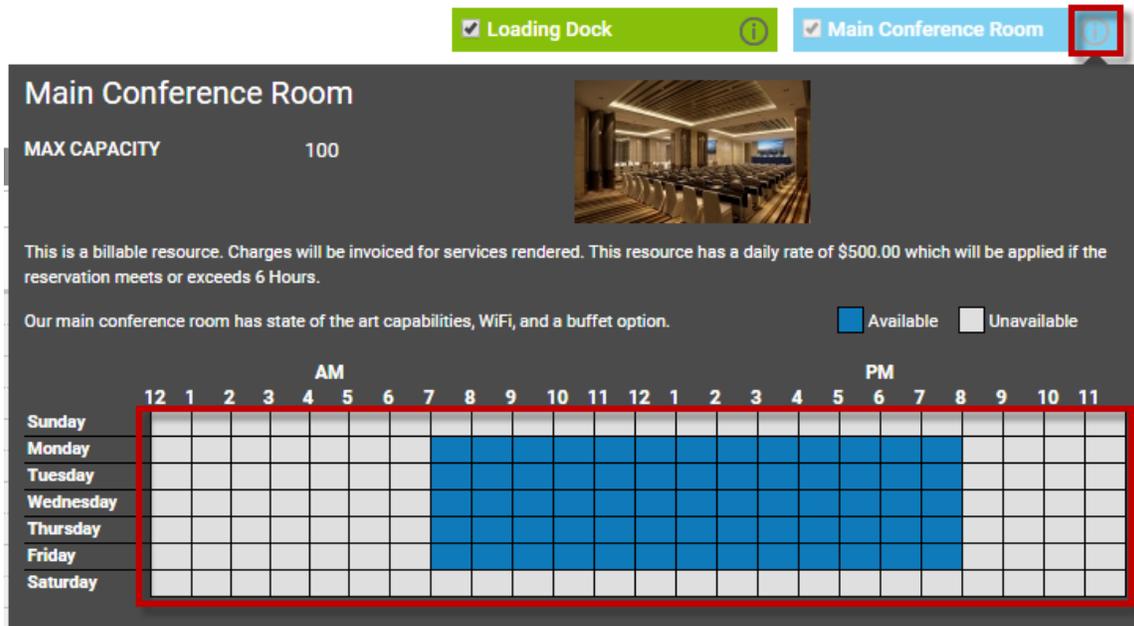
Creating a Single Reservation

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a one-time reservation.

To book a reservation for yourself or on behalf of a tenant:

1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.

2. Select a building.
3. Click either **+ CREATE RESERVATION** or click on the calendar to open up the resource reservation form.
4. Select a **RESOURCE, STATUS, REQUESTER, EVENT NAME, EVENT TYPE** as **Single**, and a **START** and **END** time. *Note: To check Resource availability, hover over the (i) located in the Resource legend.*



5. Either click **Save** to add the request to Pending Requests, or click **Approve** to save and approve the request.

Creating Multiple Reservations

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a one-time reservation.

To book multiple reservations for yourself or on behalf of a tenant:

1. Click **Go To** → **Resource Schedule** → **Resource Schedule Calendar**.
2. Select a building.
3. Click either **+ CREATE RESERVATION** or click on the calendar to open up the resource reservation form.

4. Select a **RESOURCE**, **STATUS**, **REQUESTER**, **EVENT NAME**, and **EVENT TYPE** as **Multiple**.

Reservation Request

RESOURCE: Select

EVENT TYPE: Multiple

STATUS: Approved

EVENTS: 1

5. Select a **START DATE**, **END DATE**, and click **Add Another**. Continue clicking **Add Another** until all event are entered.

Event 1

START DATE: 11/18/2015 4:00 pm

END DATE: 11/18/2015 5:00 pm

Full Day Event

Cost: \$0.00

Add Another

OK

6. Click **OK** to finish entering events.
7. Click **SAVE** to finalize the Resource request.
8. (Optional) To remove an event:
 - a. Click **EVENTS: 3**.
 - b. Select the Event you want to delete and click **Remove**.

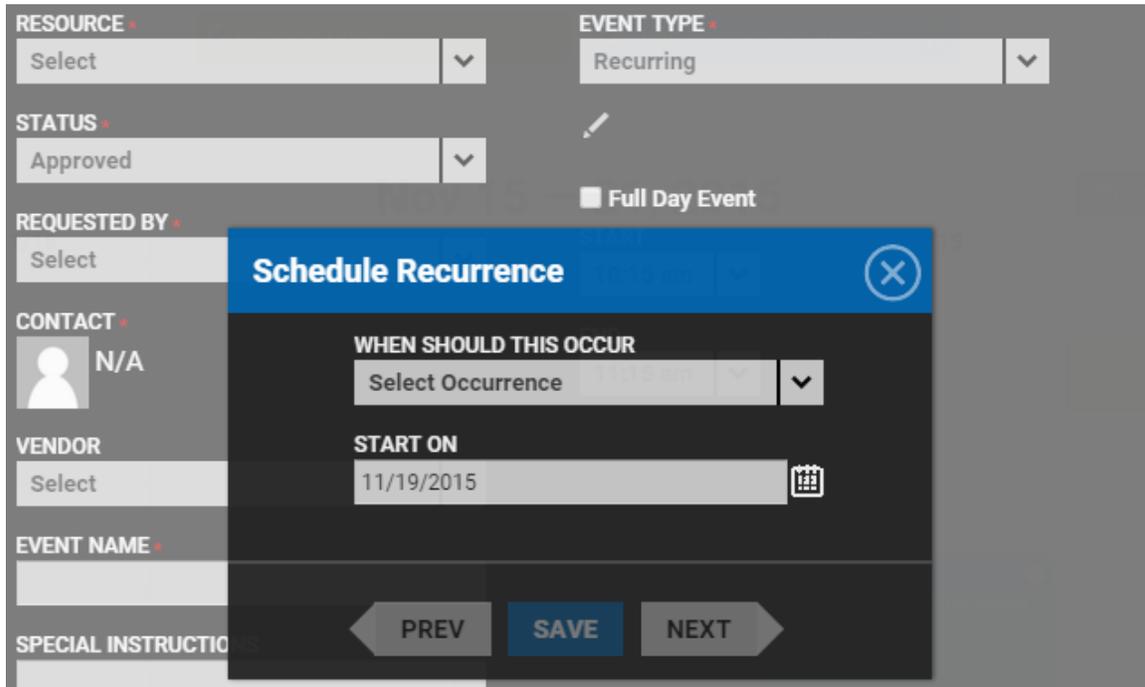
Creating a Recurring Reservation

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a recurring reservation.

To book a recurring reservation for yourself or on behalf of a tenant:

1. Click **Go To** → **Resource Schedule** → **Resource Schedule Calendar**.
2. Select a building.

3. Click either  **CREATE RESERVATION** or click on the calendar to open up the resource reservation form.
4. Select a **RESOURCE**, **STATUS**, **REQUESTER**, **EVENT NAME**, and **EVENT TYPE** as **Recurring**.
5. Using the **SCHEDULE RECURRENCE** box, select a frequency, **Start On** date, and click **NEXT**.



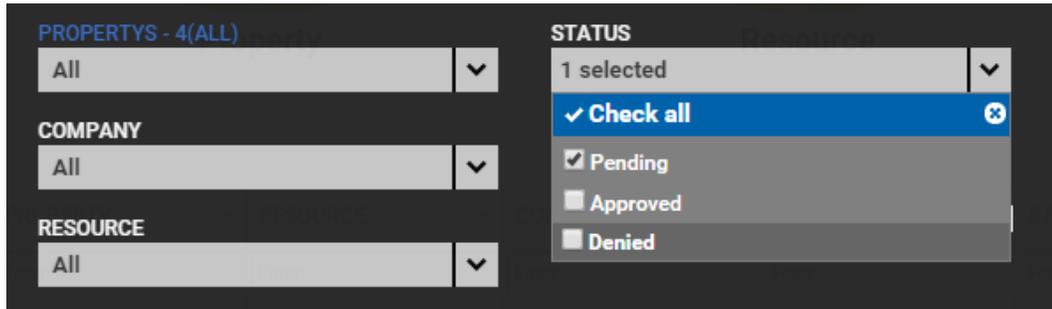
6. Continue selecting the recurring reservation request options, followed by clicking **NEXT**.
7. Select an end date, and click **SAVE**.
8. Click **SAVE** to finalize the recurring reservation event.
9. (Optional) To edit a recurring reservation event:
 - a. Click the **Event** on the calendar.
 - b. Click to edit either the **SERIES** or an **OCCURANCE**.
 - c. Edit the series or occurrence and click **SAVE**.

Managing Resource Reservations

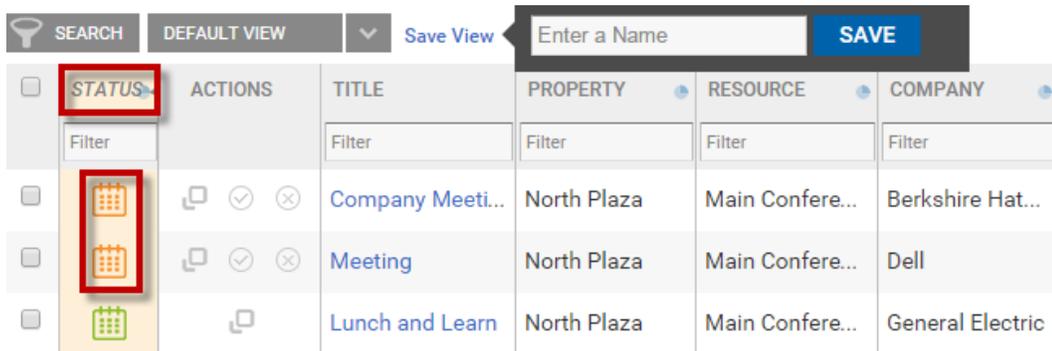
After a resource request has been submitted it is moved into the Pending Requests section of Resource Scheduling. This section describes how to locate the Pending Requests, and then approve or deny them. *Note: Only System Admin users are able to approve or deny reservation requests.*

To locate a pending resource request:

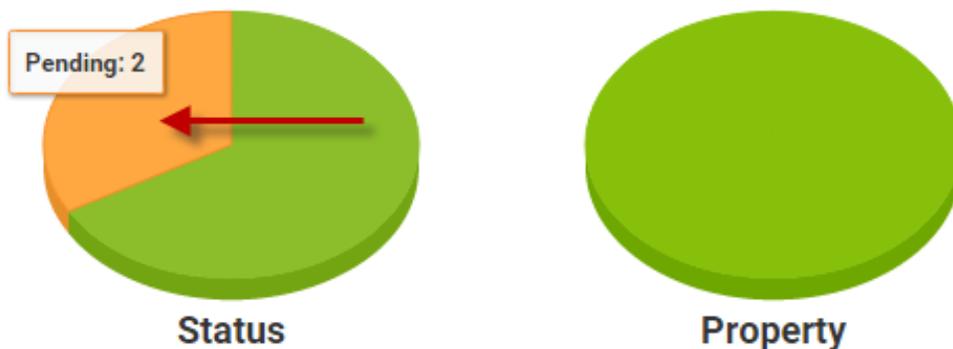
1. Click **Go To** → **Resource Schedule** → **Resource Schedule List**.
2. Pending requests are represented with a yellow icon. You can sort pending requests by:
 - a. Click **SEARCH** and sort the grid via the Pending **STATUS**.



- b. Click **STATUS** to filter all Pending requests to the top of the list.

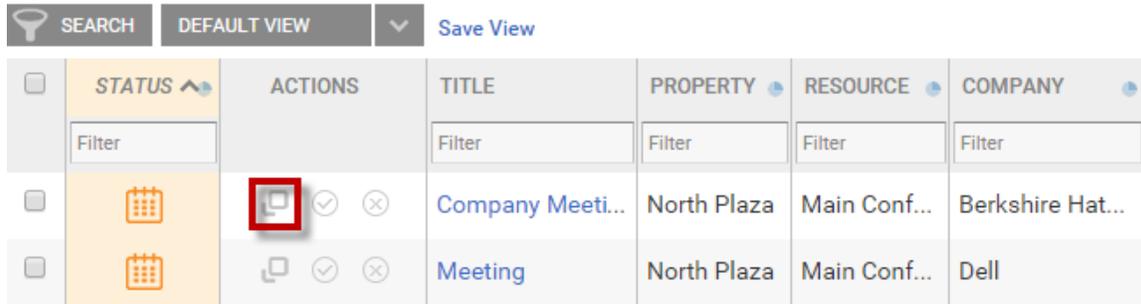


- c. Click the yellow slice of the **Status** pie chart.



3. (Optional) Use the **SEARCH** and column filters to locate and review requests.
4. (Optional) Click the Reservation **TITLE** to review the resource request.

- (Optional) Click  in the **ACTIONS** column to view the Reservation request on the calendar.



SEARCH	DEFAULT VIEW	Save View				
STATUS	ACTIONS	TITLE	PROPERTY	RESOURCE	COMPANY	
Filter		Filter	Filter	Filter	Filter	
	  	Company Meeti...	North Plaza	Main Conf...	Berkshire Hat...	
	  	Meeting	North Plaza	Main Conf...	Dell	

- Either click  to approve the request, or  to deny it.

Ending an In Progress Event

If you need to prematurely end an in-progress event in Resource Scheduling, Property Management employees can enter the reservation and end it. This section describes how to end an event early.

To end an event early:

- Click **Go To → Resource Schedule → Resource Schedule Calendar**.
- Navigate and click on the event you want to end early.
- Click **END NOW**, and confirm by clicking **Continue**.

Managing Resource Notifications

This section describes the process of setting up and deleting notifications for Resource Scheduling, along with recommended notification setups.

To create a new notification:

- Click **Go To → Resource Schedule → Resource Schedule Calendar**.
- Click the bullhorn icon.



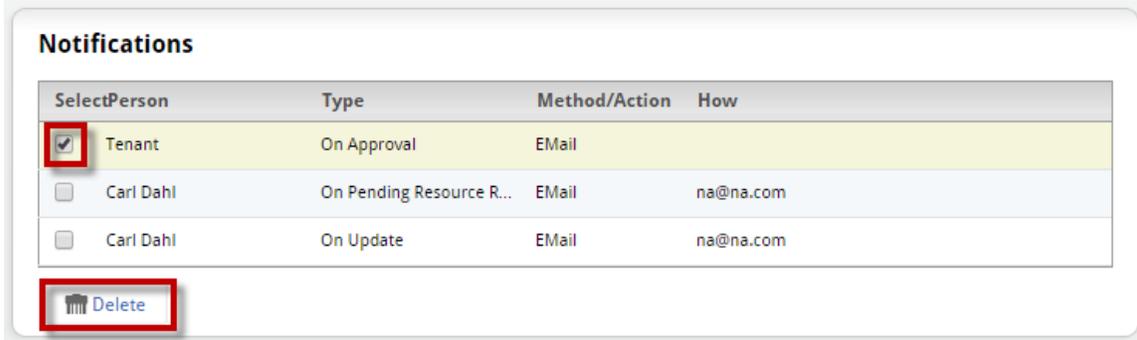
Please select a Property

- Using the **Create New** section, select a **Building**, **Person** to be notified, **Type**, and **Method/Action**, and click **Add Notification**. Notifications are then populated in the **Notifications** section. *Note: Selecting ****Tenant as the***

person for a notification sends messages to the tenant contact associated with a specific reservation.

To delete a notification:

1. Check the box next to the notification you want to delete.
2. Click **Delete**.



Note: You have the option of setting up notifications to your preference, however, Building Engines has does have a recommended minimum notification setup.

The two notifications we recommend creating are:

- Notify ****Tenant ON APPROVAL and ON UPDATE**. This ensures that tenants are notified whether their reservation is approved, edited or denied.
- Notify a Property Management contact **ON PENDING RESOURCE REQUEST**. This ensures that the coordinator is always aware when a new reservation request is submitted. These notifications will contain a link to the reservation, as well as a quick approval link.

Resource Task Management and Billing

All tasks and billing for resource reservations can be managed through work orders. This section describes how to configure the application to automatically create a work order prior to an event.

To configure the system to automatically create a work order prior to an event:

1. Click **Admin → Property Settings → Space Management**.
2. Select the building the Resource is in.
3. Click **Show Building Setup**.
4. Locate and expand the floor that the Resource is on.

- Click the **(Configure)** located next to the Resource you want the system to create an automatic work order for.

Manage Space For:

5	Occupancy: 100%	
4	Occupancy: 100%	
3	Occupancy: 100%	Edit ...
2	Occupancy: 100%	
1	Occupancy: 100%	

Occupancy Rates

Total Occupancy: 100%
Total Suite(s): 11

Legend: ■ Occupied ■ Vacant

100	0 sq/ft	General Electric
101	0 sq/ft	Toyota Motor
Main Conference Room	0 sq/ft	Meeting Area (Configure)
Loading Dock	0 sq/ft	Freight Area (Configure)

- Within the **Configure Resource** window, click **Create Work Order to manage related tasks and billing**.
- Select how many days in advance you want the work order created prior to the event. *Note: If a reservation is approved within the designated time frame, the work order will be created immediately.*

Options

Prevent Tenants from Reserving this resource

Auto Approve Reservations

Create Work Order to manage related tasks and billing

Create days before reservation

Allow Tenants in these other buildings to access this resource:

Require day(s) in advance notice to schedule

day(s) in advance notice to cancel

min(s) setup time before

min(s) cleanup time after

- Click **SAVE** to finish.

Setting up a Resource Request Work Order Notification

If you decide to configure the system to automatically create a work order prior to an event, it is highly recommended that you configure an accompanying work order notification. This notification can be used to remind the assignee about the tasks and/or billing associated to the event.

To configure a notification for a resource request work order:

- Click **Admin → Notifications**.
- Click .

- Using the **Issue Type** field, select either **Freight Area Request** or **Meeting Area Request**. The type selected is determined based on the room type selected while creating the resource space.

New Notification

BUILDING *
North Plaza

ISSUE TYPE *
Select

- Keys
- Light Bulbs
- Miscellaneous
- Plumbing
- Trash Removal/Recycling
- Leak
- Access Card Request
- Access Card Cancellation
- Freight Area Request**
- Meeting Area Request**

RECIPIENT *
Select

ACTION *
Select

- Select and **On Status, Recipient, Action**, and click **SAVE**.

Tracking a Resource Request Billable

Work orders that are created for a Resource are created with a tenant's special instructions and Event charges already included. These charges are preset on the Configure Resource page, however, may be added, edited, or deleted on the work order as needed.

Resource Request Work Orders appear in the regular Work Order section of the application. The following image is example of work order created from a resource request.

Meeting Area Request - #351271974
1
21

REQUESTED BY: John Smith

BUILDING: Berkshire Crossing

TENANT: BE Building Services

FLOOR: 5

SUITE: Conference 5A

LOCATION: Conference 5A

CREATED: 05/19/2015 02:13 PM

ASSIGNED TO: Unassigned

ISSUE TYPE: Meeting Area Request

FLAG: -- No Flag --

STATUS: New

Details: Event: Company Meeting Date/time: May 20, 2015 3:00 PM - 6:00 PM Special Instructions:

← REASSIGN ▲ CHANGE STATUS 📅 SCHEDULE 💬 ADD COMMENT ⏸ HOLD ↶ SHARE 🖨 PRINT

Billable items are displayed in the **Labor and Materials** Section of the Work Order. The following image is an example of a billable item from a resource request.

Labor and Materials \$300.00 🔍 ⏪ ⏩ 🗑 🔄 ⏴ ⏵

	NAME	PRICE/RATE	QTY/HRS	SUBTOTAL	TAX	MARKUP	MARKUP TAX	TOTAL	BILLABLE
<input type="checkbox"/>	5A Conference Room Rate	\$100.00	3	\$300.00	0.00%	0.00%	0.00%		✓

Pre-Recorded Resource Schedule Webinar Link

To access a pre-recorded demo of the Resource Scheduling module click: <https://buildingengines.wistia.com/medias/713sd5le7i>