Quick Start Guide

simplify your scheduling

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Introduction

VisualTime Room Scheduling is a user friendly and powerful resource and room scheduling software.

The VisualTime system is comprised of several software components. The user software components are the VisualTime Rich-Client and the Web Client.

The VisualTime Rich-Client runs as a standard Windows application and connects to the VisualTime Application Server via HTTP calls. With the Outlook Integration Module enabled and when the Microsoft Outlook software is installed on the local users PC, the VisualTime Rich-Client can communicate with Outlook and create meeting invitations in the user's Outlook Calendar which are synchronized with the VisualTime scheduled activities.

The VisualTime Rich- Client is a Zero Installation Client which does not require to be installed and does not require any administrative privileges on the local users's PC in order to run.

Concepts

Each room, conference room, piece of equipment, etc, needs to be defined in the VisuatTime system as a **Resource**.
The Resources have Features and Capabilities and are grouped within Resource Groups, **Locations** and **Sites**.
A Resource is booked, scheduled or reserved by creating an **Activity**. An Activity in the VisualTime system is the representation of period of time of one or more resources when these resources are dedicated to a particular task.

All the elements of the VisualTime system need to be defined and configured by an administrator via the VisualTime Management Console. The VisualTime system administrator plans the implementation of the system and establishes how the business requirements will be represented in the VisualTime system and user interface.

Main screen

The main screen of VisualTime is made of six principal elements:

Toolbar – Allows access to the various modules of the program. Some modules may not be accessible if the modules are not enabled at the application level or if the profile current user profile does not have sufficient permissions.

Date Navigator – Allows the user to select the current date for the Main View.

The Main View – Also referred to as the Roster or Calendar, it displays the selected resources and activities for the specified date. There are seven built-in views: the Time Table view, the Day view, the 5 Working Days view, the Week view, the Month view and the Quickview.
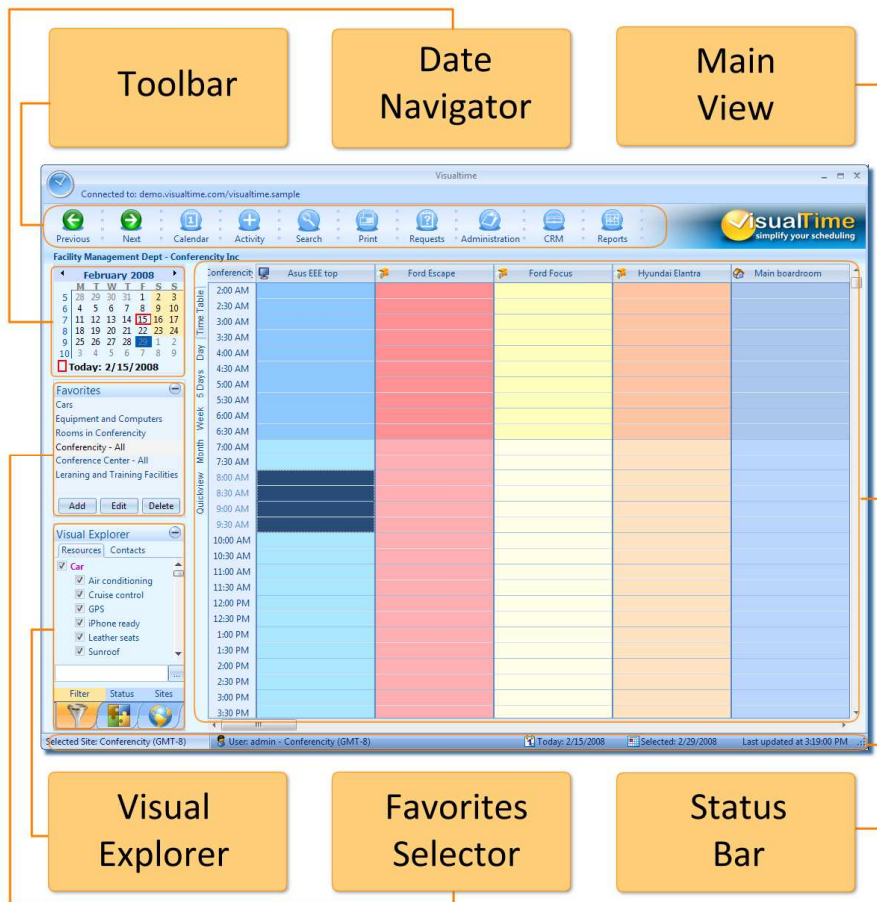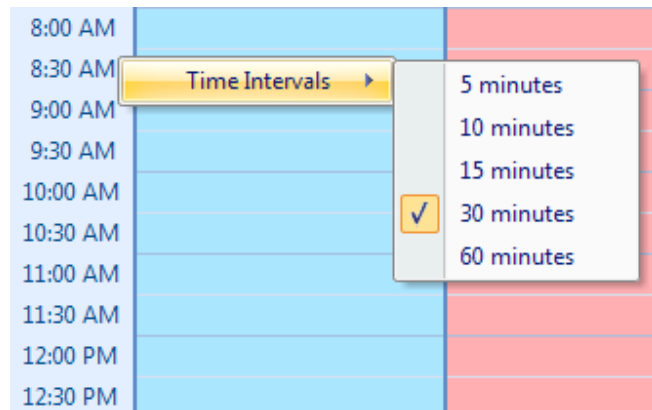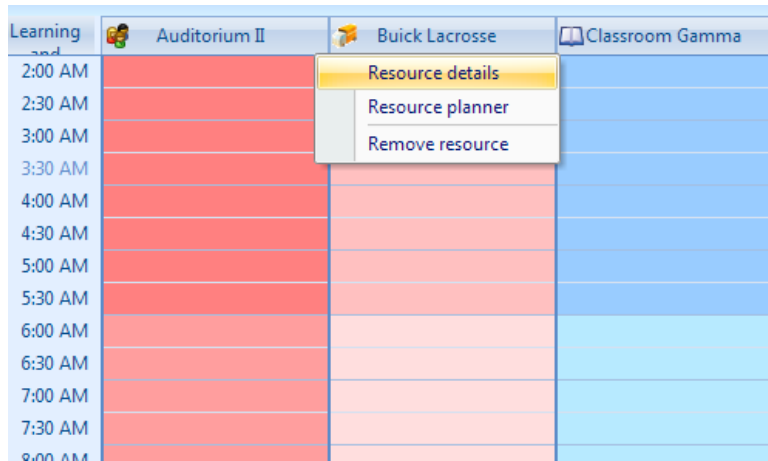
The Time Table view

The Time Table view displays the resources as columns and the time as rows with the time indicator on the left.
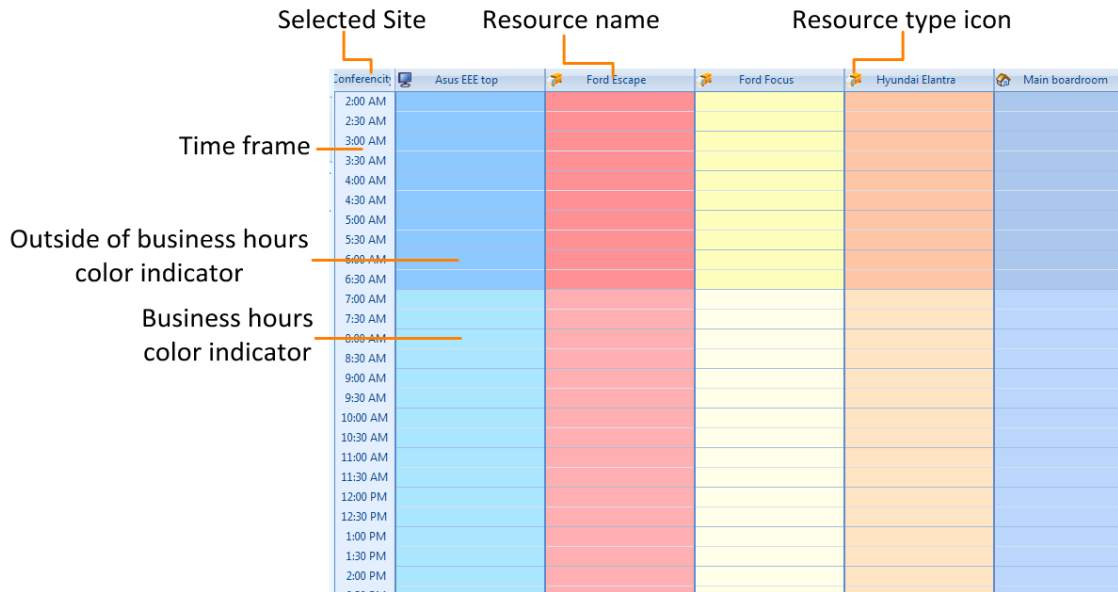
The time intervals in the Time Table view can be selected from 5, 10, 15, 30 minutes and 1 hour.

The resources can be removed from the Time Table view through a context menu available via right-click.

The resources are sorted by default in alphabetical view. To change the display order of the resources in the Main View just drag and drop the resource name.

The other views
The Day, Working Week, Week and Month Views are based on a Gantt chart style view where the resources are shown as rows and the time slots are shown as horizontal lines. The darker areas are the weekends or dates which are defined in the system as holidays.

The Quickview displays each resource as a picture (if available) together with a resource availability status indicator.

The resource status indicator shows if the resource is available during the interval specified in the Visual Explorer.

The green indicator is displayed if the resource is available.

The red indicator is displayed if the resource is busy.

Visual Explorer
The Visual Explorer is a very powerful way to control the resources and activities displayed in the Main View. The Visual Explorer has two main tabs: Resources and Contacts.
Once selected, the Resources tab has three separate tabs at the bottom:
The Filter can quickly filter the resources shown in the Main View by selecting or de-selecting particular resource types or resources having certain features.
Via the Status tab you can also select resources based on status – booked, available or unavailable between predefined intervals as well as filtering the Activities based on activity type and activity status.
The Sites tab allows selecting a particular Site and the Locations belonging to that Site.
The Multiple Sites Module needs to be enabled in order to have more than one Site.
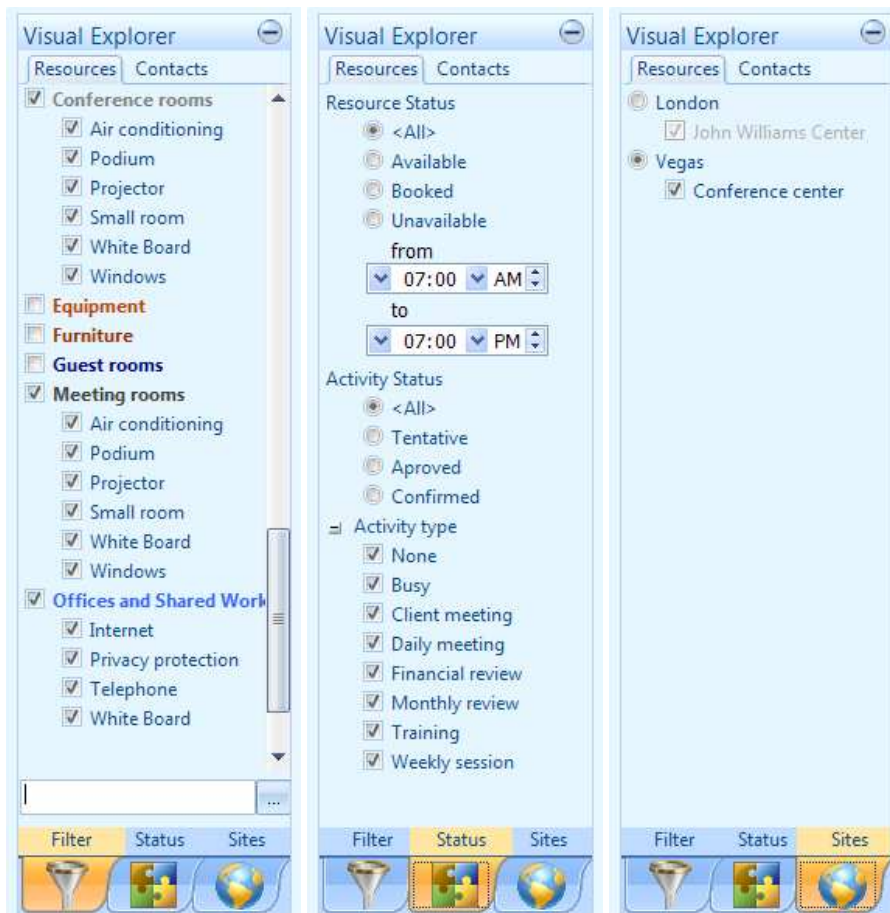
Note: The main difference between sites and locations is the ability of a site to contain multiple locations . Another characteristic of the sites is that each Site can be in a different time zone. If your business has resources located in different time zones, you will need to define at least as many sites as time zones you have. In the same time zone you can have one or more sites. If you need to have separate administration and permissions in regards to the resources and services you manage, you will need to create a separate Site for each logical administrative unit as permissions for the user profiles are granted at the Site level. A minimal configuration will contain at least one Site with one Location.

The **Contacts** tab of the Visual Explorer, allows the display of external calendars within the Main View.
When Microsoft Outlook is installed on the computer where VisualTime is running, you will be able to search through your Outlook Address Book as well as through the Global Address Book stored on your Microsoft Exchange Server. You can also quickly add contact into the VisualTime address book by selecting the **Quick add** option.

Favorites

The Favorites are user configurable predefined sets of criteria for the main view. Each user can create and customize his or her own set of Favorite views. Once created, the Favorite views can be accessed by selecting them from the list.
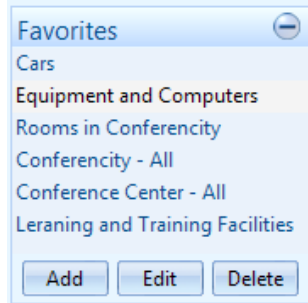
A Favorite View can be set as the default view by checking on the Is Default option. The Default view is the view which is automatically loaded when a user logs in.

Searching for Activities and Resources

By clicking the Search button on the toolbar, the user can specify it's own criteria and find a particular activity stored in the VisualTime system database.

The star * sign can be used as a wildcard in the name field.
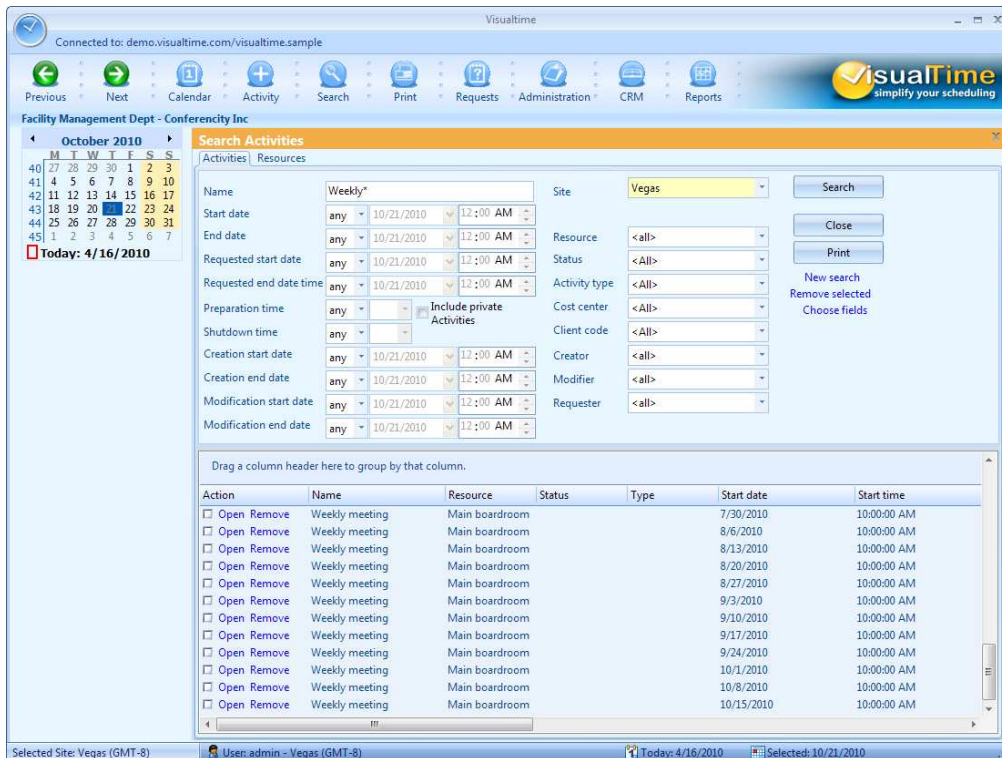
A very powerful feature is the user defined custom list. This feature allows the user to sort and group the search results by dragging the column header fields or remove certain columns in order to create a customized view:


Creating an Activity

In order to book, reserve or otherwise schedule a resource, the user can select the desired time slot and resource through the View of choice.

There are several ways to create an Activity:

- By selecting a time slot in the Time Table view
- By selecting a time slot in the Day, Working Week, Week or Month views.
- By selecting the desired resource in QuickView.
- Via the Activity button from the Toolbar.
- Via Copy / Paste – A previously created Activity can be easily duplicated by copying and pasting it via the context menu.
- By selecting a resource in the Resource Search results list.
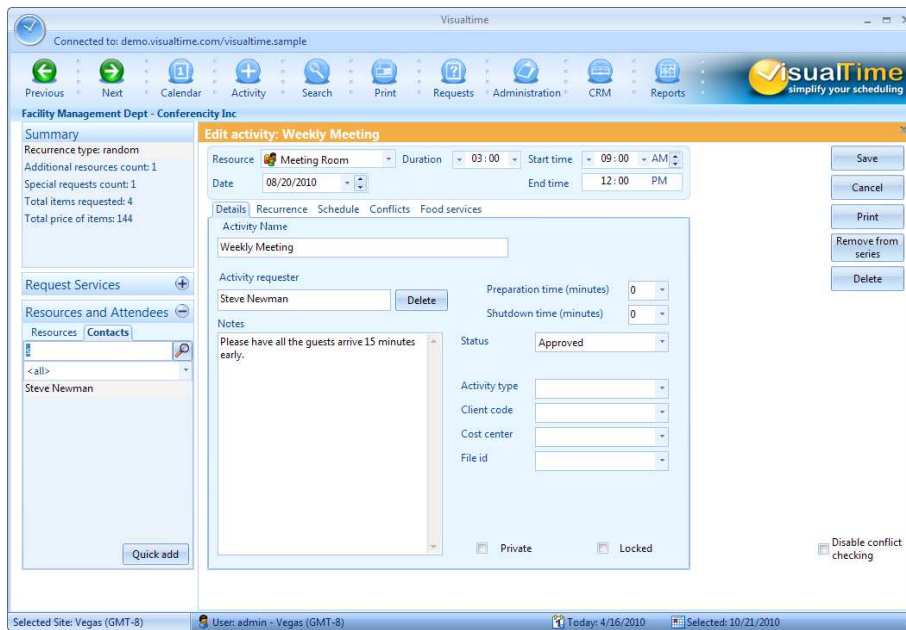
When the Services module is enabled, depending on the capability of the Main Resource where the Activity takes place, a list of services that can be requested is presented and you can select the required service from that list:
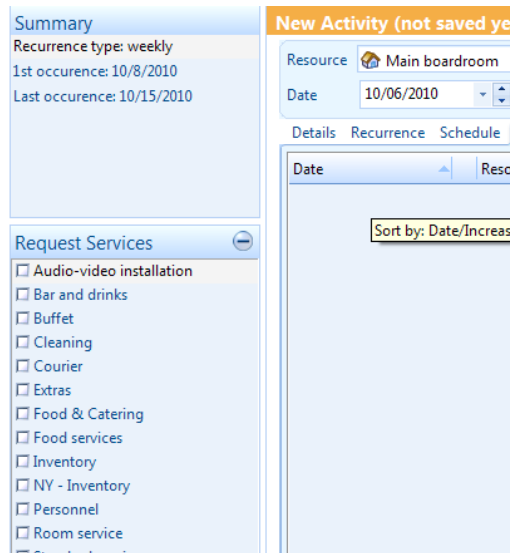

An Activity may require more than one resource and it may also require a number of attendees or participants.
A list of resources is presented on the left side of the Activity form so any additional resources can be added to the activity. Optionally, if Microsoft Outlook is installed and if the Outlook Integration Module is enabled, you can add Attendees to the list by searching and selecting them from the Global Address Book (in case of Microsoft Exchange Users) or Personal Address Book.
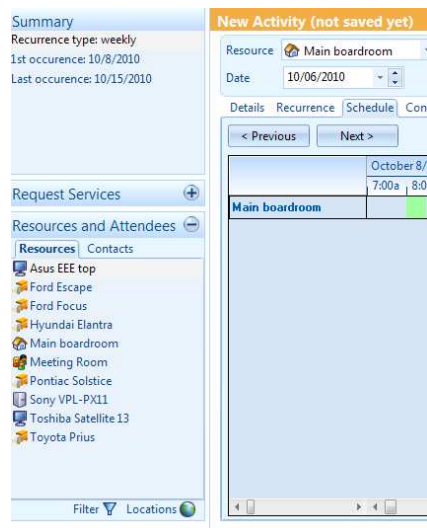
Activity

Once saved, the activities are displayed on the Main view. In the Time Table view, there are number of visual elements that give additional information about each activity: Activity Type and Activity Status based the color, icons for Recurrence, Private, Requested Services, Additional resources, etc.
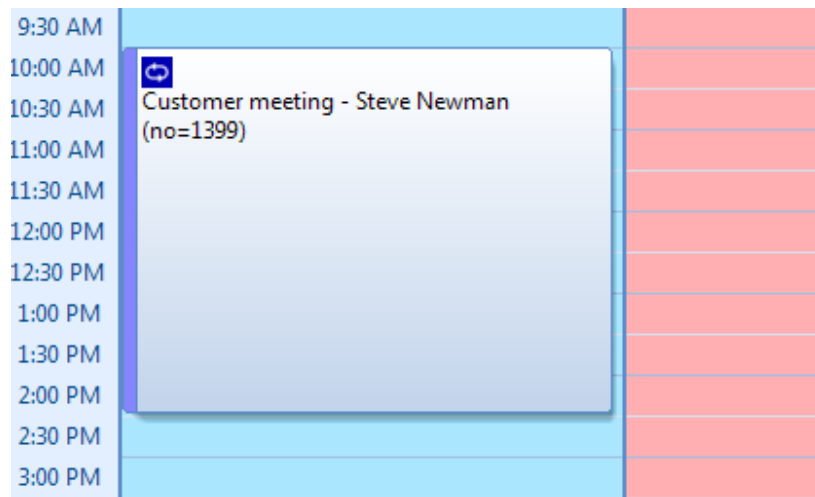
Additional information:

For more information please refer to additional documentation available for download from www.visualtime.com.