



Visualtime

Connected to: demo.visualtime.com/visualtime.sample

Previous Next Calendar Activity Search Print Requests Administration CRM Reports

Facility Management Dept - Conferency Inc

February 2008							Conferency Learning	3D Television	Alpha Conference Room	Amazon room
M	T	W	T	F	S	S				
5	28	29	30	31	1	2	11:00 PM - 2:00 AM			
6	4	5	6	7	8	9	11:30 PM - 2:30 AM			
7	11	12	13	14	15	16	12:00 AM - 3:00 AM			
8	18	19	20	21	22	23	12:30 AM - 3:30 AM			
9	25	26	27	28		1	1:00 AM - 4:00 AM			

Getting Started Guide

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Introduction

VisualTime is a resource planning and scheduling system for the enterprise. You can use VisualTime to manage the booking and reservation of facilities, rooms, offices, equipment, services and more.

The software is built as a multi tiered application and can be deployed on customer's premises or as an online service accessible via the Internet.

We are confident that you will find VisualTime to be flexible and feature rich, while remaining easy and intuitive to use.

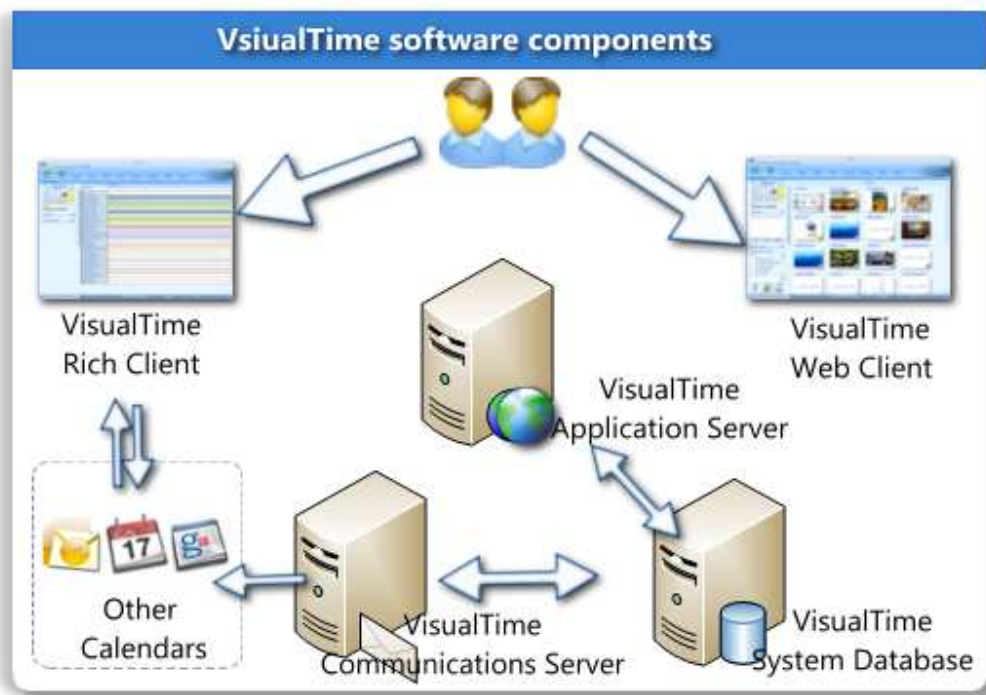
Application components

VisualTime software is comprised of server components and client (user) components. The VisualTime administrator is responsible for installing VisualTime on the server.

Note: If you are using it as an online service, the server components are managed by the the VisualTime staff.

The user components are the rich client and the web client. As option, the Outlook Integration module requires the Microsoft Outlook program to be installed on the user's PC.

The server components are: the web/application server (IIS), the database server (MS SQL Server) and the VisualTime Communication Server (aka the VisualTime System Agent).



Concepts

The following list provides a brief description of the concepts and elements used in VisualTime

Resources – are basic elements used to define any physical element from your business processes requiring management and scheduling. Examples of resources that can be scheduled are rooms, furniture, equipment, tools, cars, trucks, etc.

By definition resources can only be elements that are not easily replaceable. Note: Elements that produced or stocked should not be defined as resources but rather as supplies or finished goods, etc.

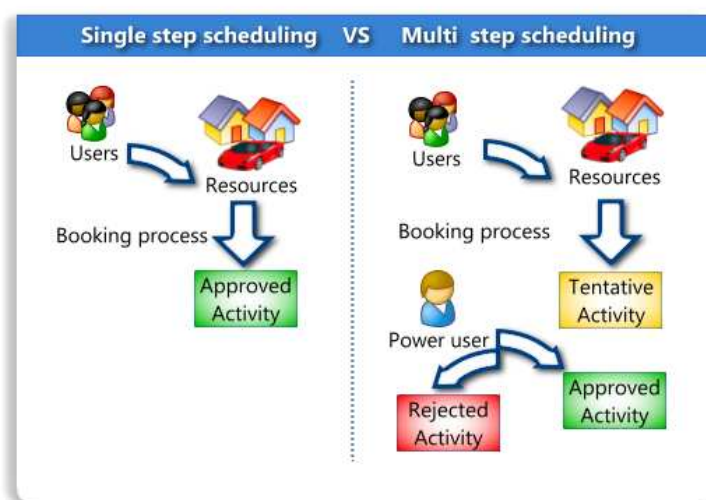
Activities – are defined as a logical representation of your actual business activities in respect to the resources. An activity is comprised of one or more resources and a time interval where the activity takes place. The VisualTime activities are portions of time where the particular resources are dedicated to a particular operation. The activities can be assimilated with bookings, reservations, meetings or appointments.

Depending on the way the application is configured by the administrator, an activity can have a different **status**: Tentative, Approved, Confirmed or Cancelled.

Single step scheduling vs multi step scheduling

If your business allows the resources to be scheduled and reserved directly by the users then you can consider that you have a single step scheduling process.

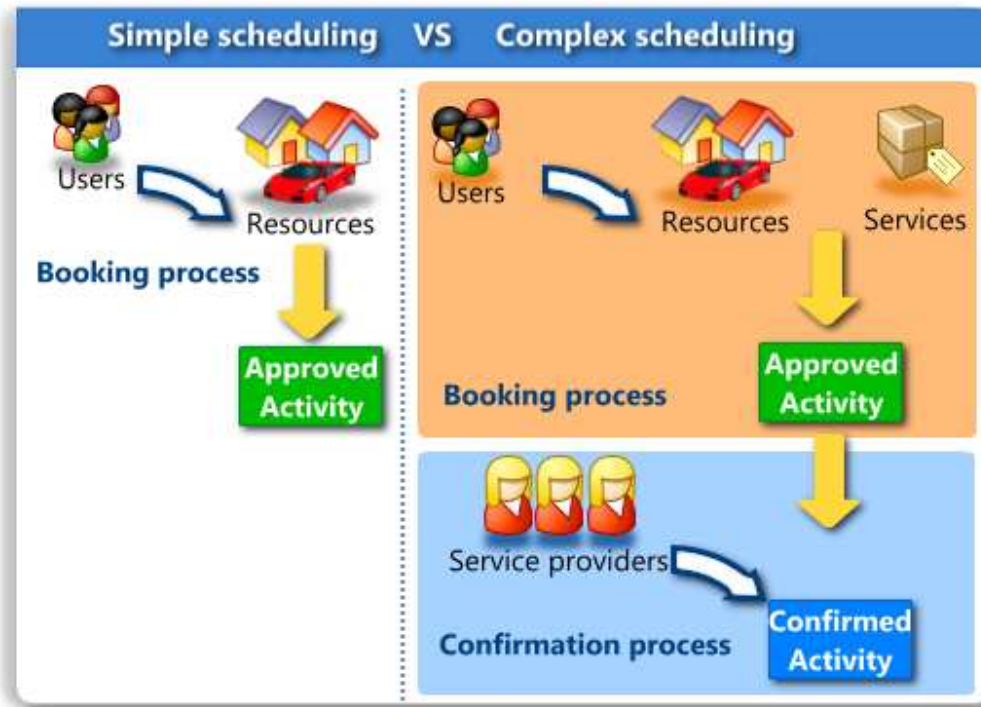
If your processes require each activity to be booked and then approved by a resource or activity administrator then you have a multi step scheduling process.



Simple scheduling vs complex scheduling

If your scheduling process only involves the reservation/booking of the particular resources, then your process will be referred as Simple Scheduling.

If your business requires certain services to be provided during some of the activities, then we will refer to this as Complex Scheduling.



Services – can be defined in your VisualTime application and can be requested in conjunction with any activity if the home resource supports it. Services can be defined as Food & Catering Services, Supply Services, Personnel Services or General Services.

Depending on the type of license you have acquired or the subscription options you have signed up for, the Services module may not be available in your VisualTime application.

Activity confirmation

The activities for which one or more types of services has been requested, will need to be confirmed by each of the providers of the particular service.

Sites

A site is the primary physical space or geographical area where your business is located. By definition, all your resources belong to a site. You can not have resources outside of a

site. An example of a site could be a building and the resources are the rooms within that building.

Locations

You can define one or more locations within a site. A location is a logical way to group resources. A resource can only belong to one location. An example of a location could be a particular floor within a building. Or if the site is defined as a group of buildings or an area, the locations could be as well defined as buildings.



User profiles

Each user needs to have a login id in order to have access to the application. The ability to perform certain tasks is managed through the settings defined for each one user's profiles. Each user must have a profile assigned to his own login id. By defining specific permissions for each profile, the administrator can manage the permissions for each user. For example Profile X can book rooms and schedule activities for a particular site but not for another site, etc. The administrator can create profiles and define granular permissions for each profile.

By default the application is installed with two profiles: the Guest and the Administrator profiles. These profiles can not be deleted as they are

Catalogs

Each service provider can define his own set of items that can be ordered/requested through that service. These items are grouped into lists referred here as catalogs. In order to request an item from a particular service provider, the manager of that service must first make the item available for ordering.

Business modules

VisualTime is structured in several business modules which can be added on top of your base installation and can be acquired separately. Depending on the type of license you have acquired or the subscription options you have signed up for, these modules may not be available in your VisualTime application.

Catering & Food Services

It allows users to request Catering & Food Services for their activities, meetings and reservations.

Furnishings

It allows users to request specific consumable items for their activities.

Customer Relationship Management

It allows power users to manage customer contacts, charge per room or resource usage and generate invoices.

Microsoft Outlook and Microsoft Exchange integration

With this module the VisualTime users can use the Outlook Global Address Book and Microsoft Exchange directory and book Outlook meetings directly from VisualTime.

Web access module

The web access module allows users to schedule rooms and resources via their web browser. An organization can enable this feature for extranet access.

Personnel requests

This module allows organizations with complex activities to manage special requests for personnel, contractors and staff in conjunction with the scheduled resources.

Generic Services

The Generic Services module is designed to allow the seamless integration of any type of requests and services for any organization. Any type of services can be defined via this module.

Reporting and Business Intelligence

The reporting module allows the integration of industry standard reports and dashboards into the VisualTime application. The users can design and publish their own custom reports based on the Visualtime database without any limitation.

LDAP and ICAL integration

For large organizations using LDAP authentication and calendaring systems based on industry standard protocols, VisualTime can act as a plug in to these systems and reuse the information stored in there minimizing changes to your IT infrastructure.

Multiple Sites

For organizations with multiple physical sites or where access to your resources requires granular security, the Multiple Site module enhances your Visualtime application and allows delegated administration of your resource pool.

Configuring VisualTime for first time use

Once the application has been installed on your server or - in the case of an online subscription – once the application you have been granted access to the application, you should then configure it according to your business requirements.

Note:

It is important to plan your application configuration prior to starting to implement it. Once you have assigned your location to a particular site, the particular location can not be re-assigned to a different site. This will also affect your resources as each resource is assigned to a location therefore the resources can not be assigned to a different site. If you need to move your locations or resources between sites you will need to recreate them.

When the application is first installed, the installation program creates and configures automatically a minimum of settings so an administrator can log in and complete the configuration according to your business needs.

Once the program has been installed on your servers, there is an initial site and a single location created by default.

There are two user profiles automatically created: Administrator and Public. The Administrator profile can not be deleted.

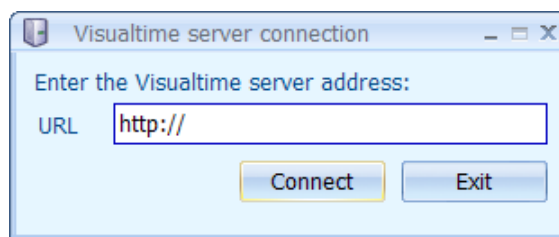
By default, the installation program creates two users: admin and guest.

Running VisualTime

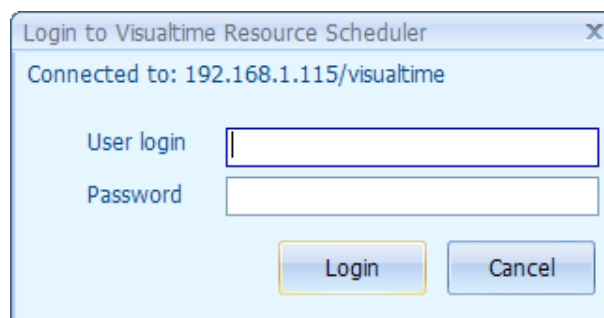
The VisualTime client is a rich internet access application (RIAA) designed to run on the Windows operating system. It can be launched from a local folder on your computer, from a network share or from a web page. It does not require any installation or administrative privileges and no additional components need to be installed on the local computer.

To access VisualTime:

1. Double-click on the Visualtime icon provided by the network administrator.
2. Depending upon the application settings you may need to provide the server address



3. Type in the server address as instructed by the application administrator and then click Connect.
4. When prompted, enter your user name and password and press the Login button.



Connection URL

The network administrator can allow the users to download the visualtime.exe client from the web server where the application was deployed or you can have all the users running the program via a shared network folder.

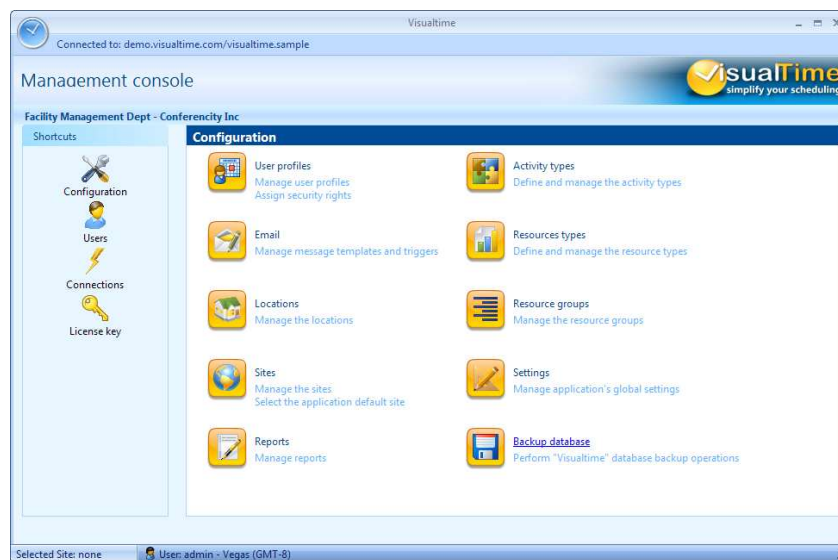
If the user is using Microsoft Internet Explorer to browse the VisualTime web page on the web server (typically accessible via <http://<yourservername>/visualtime>) and if the user's browser privacy settings allows cookies to be created, then a cookie will be automatically created thus allowing the `visualtime.exe` program to connect back to the server without prompting the user to enter a connection URL. If the connection is successful, a `VisualtimeSettings.xml` file is then created in the user's temp folder storing the connection URL and the default user name.

Logging in via the Management Console

When you access the application for the very first time it's necessary to login to VisualTime Management Console in order to configure it for use within your organization.

To run VisualTime in administrative mode select Management Console from the application's menu and login as Admin.

Once logged in to the Management Console you will see the control panel with icons which will give you access to each of the administrative modules:



Here is the suggested order of configuring the various parts of the application:

1. Create and define the site(s).
2. Create and define the location(s).
3. Define the user profiles.
4. Configure the application global settings.
5. Define the user accounts and the authentication method.
6. Configure email templates.
7. Define and configure Resource types.
8. Define and configure Resource Features (recommended).
9. Assign Resource Features to each Resource Type (recommended).
10. Define and configure Activity types (optional).
11. Create and configure the resources.

Once the application has been configured you can allow your users to start using it and schedule resources.

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