Resources

Introduction

Most churches have a number of resources which they are responsible for: the church hall, meeting rooms, conference facilities, PA equipment, OHP, lighting etc. These facilities are often used by different groups within the church at different times during the week. Making sure that these bookings do not conflict can often be a time consuming task; the new **resources manager** area of **church**insight can significantly reduce this workload.

This quick start guide covers how to add your resources to the **resources manager**, creating a new booking and processing booking requests.

Creating a new resource

Before you can book any of the church resources you must first add them to the **resources manager** as follows:

- If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.
- Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.
- Click the **resources** tab in the web office task pane to display the **resources manager** area of the **web office**.

  > **Resources tab not available?** Contact your local web site administrator for the necessary permissions.

- The navigation pane on the left hand side shows the number of bookings requiring processing:

  the resources belonging to your church are displayed in a folder structure underneath. The **resources manager** allows you to manage two types of resource:

  Equipment: items such as PA equipment, video projectors, lecterns, OHP, children's play resources, lighting equipment, TV and video equipment.

  Venues: any location such as church hall, function suite, meeting rooms, crèche, kitchens etc.

  Resources can be grouped together in a folder: a **venues** folder or an **equipment** folder. These folder types help you easily locate the resources you are looking for. A typical resources structure for the main building might look something like this:

In this example we will create a new venues folder and add the main hall as a resource.

- Click on the resources folder which has your church name. The bookings calendar will be displayed in the work pane shortly afterwards.
- Click on the Advanced tab; the **advanced** view will be displayed shortly afterwards.
- Select the **Create a new resource folder within this one** task link.
- Enter a name for the new folder, select the **icon** setting as "venues" and press the **OK** button:
- Name: Oakfield Centre OK
- The new folder will appear in the navigation pane immediately.
- Select the folder you have just created from the navigation pane – the bookings calendar for all resources in this folder will be displayed in the work pane.
- Click the Advanced tab; then select the **Create a new resource in this folder** task link.
- Enter the details of the new resource as follows:
  - **Type** – select whether this resource is a venue or an item. In this case select "venue"
  - **Name** – enter a descriptive name in the space provided. In this example enter "Main Hall" as the name.
  - **Description** – enter any additional information about the resource if required.
  - **Bookable by** – select who can book this resource from the following options:
    - **Nobody** – this resource is not available for booking. You may wish to use this setting if the resource is unusable for any reason.
    - **Booking Managers Only** – this resource may only be booked from the **resources** area of the web office.
    - **Groups** – any group may request a booking for this resource from the bookings tab in the **site manager** area of the web office.
    - **Groups and 'My Bookings'** – personal booking requests can be submitted for this resource from the **my bookings** section of the web site in addition to the facilities above.
  - **Image** – upload an image of the resource if required.
  - **Automatically confirm booking requests** – this option allows you to create a "self-managing" resource. When a booking request is received it will automatically be confirmed so long as it does not conflict with an existing booking.

  If you have selected "venue" as an resource type you will also be offered the following options:

  - **Floorplan** – upload an image of the floorplan if required.
  - **Seating capacity –** enter the total capacity for seating if required.
  - **Standing capacity** – enter the total capacity for standing if required.

- ○ **Telephone extension** – enter the telephone extension of this venue if required.

If you have selected the "item" option you will be offered the following options:

- ○ **Purchase date** – enter the date when this item was purchased.
- ○ **Supplier –** enter the name of the supplier if required.
- ○ **Supplier phone** – enter a contact telephone number for the supplier.
- ○ **Supplier URL** – enter the web address of the supplier if available.
- ○ **Supplier address –** enter the address of the supplier.

- ➲ Once you have entered the appropriate details click the **save** button to confirm your changes.
- ➲ Repeat this process for each of your resources.

Creating booking managers

Each folder of resources can have a number of **booking managers** to oversee the processing of booking requests. This allows the PA team leader to oversee PA equipment bookings, the facilities manager to oversee room bookings and so on.

In the example above Sue Drew is the facilities manager for the church so we will assign permissions which allow her to process bookings in the "Oakfield Centre" venue folder.

- ➲ Click on the "Oakfield Centre" folder in the web office navigation pane.
- ➲ Select the Permissions tab; current booking managers will be displayed in a list.
- ➲ Click the **Add a person to this list** button; the people in your church will be displayed in a new window shortly afterwards. Locate the person you are looking for using the alphabetical links if necessary and click on the forename, surname or the **>>** button. Click the **select records** button to confirm your selection.
- ➲ There are three permissions which relate to each folder:
  - ○ **Bookings Manager** – allows this person to confirm or decline booking requests for any resource in this folder as well as create new bookings.
  - ○ **Resource Editor** – allows this person to change the properties of an existing resource.
  - ○ **Advanced** – allows this person to create new resources and new resource folders.
- ➲ Once you have enabled the appropriate permissions click the **save changes** button to confirm your actions.

New booking managers are automatically added to the list of names in the **notifications** view. When new booking requests are received for resources in this folder they will automatically receive an email notifying them that a booking request requires processing.

Creating a booking

Resources in your church may be booked in a number of different ways:

- ➲ **In the resources manager** – booking managers may book resources they are responsible for directly in the resources manager. They may also create booking requests for equipment they are not a booking manager for.

- **In the bookings view of a group** – each group in the **site** manager area of the web office has a **bookings** tab where they can request resources for an activity their group is involved with.
- **In the my bookings area** – the **my bookings** area of your church web site allows individuals to request booking of certain resources for personal use.

Creating a booking in the resources manager

If you are the **bookings manager** for one or more resources folders in the church the **resources** area allows you to book any of those resources directly as follows:

- Click on the Resources tab in the web office task pane.
- Using the web office navigation pane locate one of the resources you would like to book. Click on either a **venue** resource or a **item** resource as appropriate.
- The work pane will be updated shortly afterwards to show bookings for this resource today. Select other dates using the calendar, or switch to the **month view** or **list view** to see other bookings for this resource.
- In the **day view** select the **Create a new booking for this resource** task link; the **new booking** wizard will be displayed shortly afterwards.
- Enter the details of your booking as follows:
    - **Booking title** – enter a descriptive name to be displayed in the bookings calendar (max 20 chars).
    - **For** – all bookings in the resources area are labelled as "personal bookings"; to make a booking on behalf of a group see the section below called "creating a booking in the bookings view of a group".
    - **Booking time** – choose either to :

      Specify a date and time – enter a date and time for your event in the fields provided.

      Attach to an event in the calendar – click the **choose event** button to select an event in your calendar. If the date and time of this event are edited the booking will move correspondingly.
    - **Send booking confirmation to** – by default you will receive a booking confirmation for any resources which you have requested as they are confirmed. Change the contact if necessary by clicking the button.

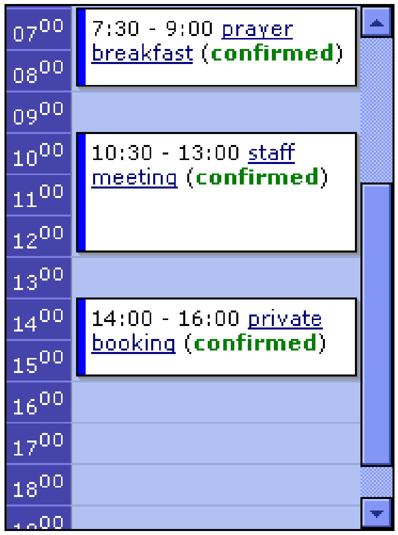
  Click the **continue** button to move onto the next step.
- If you would like to book additional resources for this event click the **add resource** button to select them from the resources browser. You can also allow for additional setup and clearup time if required at this stage.
- Set the **booking status** for each resource to **confirmed** to complete the booking. Any resources you have added which you do not have the booking manager permission for will be issued as a booking request; you will not be able to change the **booking status** for these resources.

  Click the **continue** button to move onto the next step.
- If these resources are required on a regular basis select the **yes** option and select how often you would like to book these resources.

  Click the **submit booking** button to complete the booking process.

- Select the **return to bookings list** to see the new booking in the bookings calendar:

04 February 2004



Creating a booking in the bookings view of a group

If you have the **resource booking** permission for your group you can request resources through the **bookings** view as follows:

- Select the Site Manager tab from the web office task pane.
- Locate the group you are making the booking for from the **group folders** of the web office navigation pane.
- Click on the Bookings tab; your current bookings will be displayed shortly afterwards:

Booking	Date / Time	Contact	Resources Pending	Resources Confirmed	Resources Declined	
Mothers and Toddlers	04 February 2004, 15:00 - 17:00	Barry Smy	0	2	0	✗
Mothers and Toddlers	11 February 2004, 15:00 - 17:00	Barry Smy	0	2	0	✗
Mothers and Toddlers	18 February 2004, 15:00 - 17:00	Barry Smy	0	2	0	✗
Mothers and Toddlers	25 February 2004, 15:00 - 17:00	Barry Smy	0	2	0	✗

Each booking shows how many of the resources you have requested have already been confirmed, how many are still pending confirmation and how many have been declined because they conflict with another booking. Click on the booking title of any existing booking to see the status of each resource and edit the booking if necessary.

- Click the **Make a new booking request for the** *groupname* **group**; the **new booking** wizard will be displayed shortly afterwards.
- Enter the details of your booking as follows:
    - **Booking title** – enter a descriptive name to be displayed in the bookings calendar (max 20 chars).
    - **For** – all bookings in the **bookings** view will be made on behalf of the group you have selected.

- **Booking time** – choose either to :

  Specify a date and time – enter a date and time for your event in the fields provided.

  Attach to an event in the calendar – click the **choose event** button to select an event in your calendar. If the date and time of this event are edited the booking will move correspondingly.

- **Send booking confirmation to** – by default you will receive a booking confirmation for any resources which you have requested as they are confirmed. Change the contact if necessary by clicking the button.

Click the **continue** button to move onto the next step.

➲ Select the resources you would like to use for this booking; click the **add resources** button to display the resources browser. Click on a **venue** or an **item** to display the availability for that resource and select **add resource**; alternatively select any resources folder and select **add whole folder** to request all of the resources in a folder.

> **Note:** only those resources which are available to **groups** for bookings will be displayed. See the section called "creating a new resource" above for more information.

Once you have added the required resources click the **OK** button to return to the booking request wizard.

➲ Add any additional setup and clearup time if required; if you have the bookings manager permission for any of these resources you may also wish to set them to **confirmed** at this stage.

Click the **continue** button to move onto the next step.

➲ If these resources are required on a regular basis select the **yes** option and select how often you would like to book these resources.

Click the **submit booking** button to complete the booking process. An email will be sent to the appropriate booking manager for any resources which require confirmation.

➲ Click the **return to booking list** to return to the **bookings** view.

Creating a booking in the my bookings area

The **my bookings** area of your church web site allows individuals to request a booking for certain resources for personal use as follows:

➲ Under the **my area** menu option select **my bookings**. Any existing bookings will be displayed shortly afterwards.

Each booking shows how many of the resources you have requested have already been confirmed, how many are still pending confirmation and how many have been declined because they conflict with another booking. Click on the booking title of any existing booking to see the status of each resource and edit the booking if necessary.

➲ Click the **make a new booking request** button to launch the **new booking** wizard.

➲ Enter the details of your booking as follows:

- **Booking title** – enter a descriptive name to be displayed in the bookings calendar (max 20 chars).

- **For** – all bookings in the **my bookings** area are labelled as "personal bookings"; to make a booking on behalf of a group see the section above called "creating a booking in the bookings view of a group".
- **Booking time** – choose either to :

  Specify a date and time – enter a date and time for your event in the fields provided.

  Attach to an event in the calendar – click the **choose event** button to select an event in your calendar. If the date and time of this event are edited the booking will move correspondingly.

Click the **continue** button to move onto the next step.

- Select the resources you would like to use for this booking; click the **add resources** button to display the resources browser. Click on a **venue** or an **item** to display the availability for that resource and select **add resource**; alternatively select any resources folder and select **add whole folder** to request all of the resources in a folder.

  Note: only those resources which are available to **groups and my bookings** for bookings will be displayed. See the section called "creating a new resource" above for more information.

  Once you have added the required resources click the **OK** button to update the return to the booking request wizard.

  Add any additional setup and clearup time you require at this stage before clicking **continue**.

- If these resources are required on a regular basis select the **yes** option and select how often you would like to book these resources.

  Click the **submit booking** button to complete the booking request process. An email will be sent to the appropriate booking manager for confirmation of the booking.

- Select the **return to bookings list** button to return to the **my bookings** area.

Processing booking requests

As a booking manager for some of the churches resources you will need to confirm booking requests made by other members of the church. If you are listed in the **notifications** view for a folder of resources you will automatically get an email when a new booking request is received. You can process this booking request as follows:

- Click on the Resources tab in the web office task pane.
- A list of unresolved bookings which can be processed by you will be displayed in the web office work pane. You can return to this at any time by clicking on the following link:

  21 unresolved bookings up to 04/03/2004

  Each booking title is displayed alongside the date and time of the booking, the group or person booking the resources, and the current status of the resources they have requested.

- Click on the booking title to display details of the booking and process the request.

  Each booking is divided into the following sections:

Details – the title, date and time of this booking as well as the person or group responsible for requesting the resources and the booking contact.

Resources – the resources they have requested and the current status of this request.

Series – if this request is part of a series of bookings the **series** view allows you to quickly jump to other bookings in the series.

- The **resources** view will be displayed by default; each of the resources where you have the booking manager permission will be displayed as follows:

- Set the **booking status** to **confirmed** or **declined** for each of the resources as appropriate. Use the [confirm all] and [decline all] if required to set the status for all the resources in this list.

> **Note:** those bookings where you cannot change the **booking status** are those where you do not have the bookings manager permission.

- Click the **save** button commit any changes you have made. An email will be sent to the booking contact person to inform them of any changes to their booking.

Booking conflicts

In some instances you may have a number of people wanting to use the same resource at the same time – these are known as **booking conflicts**. Booking conflicts are highlighted in the unresolved bookings list with a ! symbol.

When the booking details are displayed the resource which has been requested by a number of people will be highlighted as follows:

To resolve a booking conflict:

- Click on the (resolve…) link; a window detailing all bookings which involve this resource at this time will be displayed in a new window shortly afterwards.
- Set a **booking status** for each of the other parties involved as illustrated below:

Booking	Group/Person	Date/Time	Decline	Pending	Confirm
Kids Club	Dougie Mann	04 February 2004, 14:00 - 15:00	◉	○	○

> **Note:** if the conflicting booking is one in which both parties can share the resource you can set both bookings to **confirm**.

- Click **Apply Changes** to confirm your choice.
- You will be given the opportunity to send an email to each of the other people requesting this resource. Check the appropriate boxes and add any additional notes to the email if required.
- Finally, click **done** to return to the **booking details** window and continue processing the booking as normal.