

# CST Reservation Manager Users Guide

**Key point.** Print a copy of this guide, and use it to set-up the CST Reservation Manager for use in your church or organization.

**Key point.** The default page when you first open the CST Reservation Manager is the existing Schedule (see section 5 below). Sections 1-4 of this Users Manual explain how to set-up and make reservations that will then appear in the Schedule.

## 1. Setting up your CST Reservation Manager Account

1.1 *As a CST subscriber, your CST Reservation Manager account is automatically activated.* All you have to do is [access the program](#), and enter your personal CST username and password (*note: you cannot use the generic username and password printed monthly in the CST newsletter*). If you do not know your personal CST username and password, see point 1.2 below.

1.2. *Getting or changing your CST username and password.* You have two options on getting or changing your CST username and password

*Option 1.* Email us (([cststaff@churchsecretarytoday.com](mailto:cststaff@churchsecretarytoday.com)) your complete subscription information (name, church, address, city, state, zip code, and phone number) and the username and password you want to use. Usernames must be unique, so if the one you select has already been taken we must have a second option. Therefore, give us several options for the username. Email the information to [cststaff@churchsecretarytoday.com](mailto:cststaff@churchsecretarytoday.com) with the subject line: Account Request. We will make the changes for you, and verify the changes back to you via email.

*Option 2.* You can make the changes yourself by following the instructions below.

(a) First, you will need your customer account number that is printed on the first line of your mailing label on the envelope in which you receive your *Church Secretary Today* newsletter. It is an 11 or 12 digit number that begins with the number 7.

(b) Once you have your customer service number, enter the following link in your web browser (or click on the link "Update Your Personal Account Information" located on the home page at [www.churchsecretarytoday.com](http://www.churchsecretarytoday.com)):

<https://ssl.drgnetwork.com/ecom/cmr/cgi/subcustserv/start?org=CMR&publ=CS>

The above link takes you to the *Church Secretary Today* customer service form. Using that form, enter your customer number and 5-digit zip code as

printed on the mailing label for your newsletter. The customer number is the number printed directly above your name. ONLY USE A 5-DIGIT ZIP CODE. While there is a different option to enter your email address, this will not work unless we have your email address on file.

(c) Next, to look up your Username and Password (or to change them) select the link "Change Your Address" which is located under the "Customer Service Options." Your Username (same as User ID) and Password will be listed at the bottom of your account information. If you change your Username and Password, your account will not be updated until 8 PM eastern time (this is a computer automated change). Your old Username and Password will remain in effect until that time.

## 2. Logging in

2.1 *Logging in is simple.* Click the login link located in the Online Resource Center under the heading CST Reservation Manager. Then enter your personal username and password for the CST Online Resource Center. Remember, you cannot use the generic username and password printed monthly in the CST newsletter. You must use your personal username and password. If you do not know your personal CST username and password, see point 1.2 above.

## 3. Setting-Up the Administrative Options

**Key Point.** To get started you will need to enter some information about the locations, rooms, and resources for which you will make reservations. This is done using options located under the "Admin" link, which is located on the main task bar. Then follow the steps below.

3.1 *Set-up your locations.* The first step is to identify and enter information for each location you will manage. To do this click on the "Admin" link on the main task bar and then select the "Locations" link. A page will appear listing each location you manage. When you first begin, the list of locations will be empty since no data has been entered. To get started, click on the "new location" button. A form will appear. Complete the form for each location that you want in your reservation system, and then select the "add new location" button. Below are a few tips on how to think about the locations you will enter.

When managing space, it is helpful to differentiate between rooms and locations. A small church may only use one location, while a large church may use multiple locations. Let's look at a few examples to illustrate the differences based on church size, and the implications for setting up your program.

*Examples of Setting Up Locations*

Suppose each of the following congregations offers a Bible Class, and wants to keep track of space. The question is to identify the "location" where the Bible Class will be held.

*Example 1.* First church is a small congregation and has only one building. For all practical purposes, the only reservations the church makes are all located at the church. As a result, the *location* of the Bible Class is "First Church" and the room is "Room 101." In essence, the church has only one location. Every event the church will manage is at the same location, "First Church."

*Example 2.* Second Church also only has one building, but it is a large building with many different wings. Each wing has its own name such as the Adult Education wing, the Youth wing, the Children's Ministry area, and so on. In addition, each room within the church building has a unique number. In selecting which locations to enter into the CST Reservation program, this church has two options. First, it could use one location for every event--"Second Church." The room name would then be the specific identifier. So the Bible Class would be located at "Second Church" in "Room 101." However, another option also exists. The church could enter the names of the various wings as locations. In such a case the Bible Class would be located in the Adult Education wing meeting in Room 101.

*Example 3.* Third Church is a large congregation with a campus housing several different buildings. In this example, each building represents a different location, so it makes sense to enter each separate location in the CST Reservation program. So, the Bible Class might be located in the Adult Education Building in Room 101.

**Key point.** When thinking about which locations to enter when setting up your program, keep in mind the location is for the convenience of the staff person who manages space use. Use as many or as few locations that best meet your needs. To get started though, you *must* enter a minimum of one location.

**3.2 Set-up your rooms and resources.** The second step is to identify and enter information for each room and resource you will manage. To do this click on the "Admin" link on the main task bar and then select the "Rooms and Resources" link. A page will appear listing each room and resource you manage. When you first begin, this list will be empty since no data has been entered. To get started, click on the "new resource" button. A form will appear. Complete the form for each room and resource that you want in your reservation system, and then select the "add new resource" button. Below are a few tips on adding the rooms and resources you will manage.

Before entering data in the room and resource form, it is best to create a list of each room and resource you will manage. This could be a sizeable list, depending upon the size of your facilities. Start by identifying each room that will be managed. Next, create a list of each resource that will be managed. Common resources include video equipment,

overhead projectors, vehicles, and so forth. Other reservation possibilities include athletic fields, keys, and instructional materials. For example, you may want to track a key that is given on a temporary basis to a church member to make sure it is returned, or reserve a DVD that will be used for a Sunday School class. Set-up an account for any space that might be reserved, or any item that you need to track to avoid conflicts, or to track so that you know it has been returned.

Below is the information contained on the New Room or Resource form:

(a) *Room or Resource Name*. For rooms, enter the room number or name. For resources, use a name that clearly differentiates multiple makes of the same resource (e.g. C.E. projector, Youth projector, Video DVD 1, Video DVD 2).

(b) *Select Location*. Select the location of the resource. The location list is a result of the information entered from section 3.1 above.

(c) *Resource Type*. Use the drop-down menu to select the type of reservation that is being made. Options include Athletic Field/Playground, Equipment, Instructional Materials, Keys, Room, Vehicle, or Other.

The remaining information on the form is optional. Enter what you find useful.

Click on the "add resource" button after completing the form.

**3.3 Block rooms and resources.** The third step is to block rooms and resources that are not available for reservations on specific dates. Typically, this represents the regular activities of the church, as well as special dates or activities during which time you do not want any other reservations to be made. To block rooms and resources, select the "Admin link" and then select the "Time Block Option." Then complete the form for each room or resource that is blocked. The form contains the following items:

(a) *Select Room or Resource*. The available list is based on the data you entered in section 3.2 above.

(b) *Date and Time*. Enter the date, along with the start and end time that you want to

(c) *Recurrence*. Using the drop-down menu, you can select from 11 different types of recurrences.

1. *Only Once*: An event that occurs on a single day without any recurrence.
2. *Every Day*: An event that occurs every day until the booking stops.
3. *Tuesday, Thursday*: An event that occurs every Tuesday and Thursday of every week.

4. *Monday, Wednesday, Friday*: An event that occurs every Monday, Wednesday, and Friday of every week.
5. *Weekdays*: An event that occurs Monday through Friday every week
6. *Weekends*: An event that occurs every weekend.
7. *Weekly*: An event that occurs every week on the chosen day of the week such as every Tuesday.
8. *Every Other Week*: An event that occurs every other week on the chosen day of the week such as every other Tuesday.
9. *Monthly by Date*: An event that occurs every month on the same date such as the 12<sup>th</sup> of every month.
10. *Monthly by Day-of-Week*: An event that occurs every month on the same day of the same week such as the third Monday of every month.
11. *Annual by Date*: An event that occurs every year on the same date such as December 25th.
12. *Annual by Day and Month*: An event that occurs every year on the same day of the same month such as the first Thursday of June every year.

(d) Block Time Slot Until. Enter the date the blocking will end. If the blocking is permanent, select the last date available.

3.4 *The fourth step is to complete the account management form.* To do this click on the "Admin" link located on the main task bar and select the "Account Management" link. Enter the name and email address that should be used when sending notifications regarding meetings. The CST Reservation Manager enables you to send notices reminding attendees of meetings, or notices in case you must cancel a meeting. The name and email address you enter on the account management form will be used to send those emails.

## 4. Making and Managing Reservations

**Key point.** Before reservations can be made, you must enter the data for locations (see section 3.1), and rooms and resources (see section 3.2).

4.1 *Create a reservation.* Once you have entered the data for locations, rooms and resources, and blocked dates, you are ready to enter reservations. To make a reservation, click on the "Reservation" link found on the main task bar. The reservation form will appear. Complete the following information for each reservation, and when finished click the "book reservation" button.

(a) *Select Resource.* Select the room or resource for which you want to make a reservation from the list that appears in the window. For a room or resource to appear in the window, it must first be entered using the "Room and Resources" link found under the "Admin" option on the task bar. For more information see section 3.2 above under the heading *Setting-Up the Administrative Options.*

(b) *Date and Time.* Enter the date the reservation will occur along with the start and end time. The start and end time are required to avoid potential conflicts.

(c) *Booking Recurrence.* Using drop-down menu, you can select from 11 different types of recurrences.

1. *Only Once:* An event that occurs on a single day without any recurrence.
2. *Every Day:* An event that occurs every day until the booking stops.
3. *Tuesday, Thursday:* An event that occurs every Tuesday and Thursday of every week.
4. *Monday, Wednesday, Friday:* An event that occurs every Monday, Wednesday, and Friday of every week.
5. *Weekdays:* An event that occurs Monday through Friday every week
6. *Weekends:* An event that occurs every weekend.
7. *Weekly:* An event that occurs every week on the chosen day of the week such as every Tuesday.
8. *Every Other Week:* An event that occurs every other week on the chosen day of the week such as every other Tuesday.
9. *Monthly by Date:* An event that occurs every month on the same date such as the 12<sup>th</sup> of every month.
10. *Monthly by Day-of-Week:* An event that occurs every month on the same day of the same week such as the third Monday of every month.
11. *Annual by Date:* An event that occurs every year on the same date such as December 25th.
12. *Annual by Day and Month:* An event that occurs every year on the same day of the same month such as the first Thursday of June every year.

(d) *Block time slot until.* Enter the date the blocking will end. If the blocking is permanent, select the last date available.

(e) *Reservation details.* Collect and enter the information for the reservation details including the subject or title of the reservation, host name (or responsible person), host phone, host fax, host email, and a description of the reservation.

(f) *Create attendees list.* You have the option of creating a list of participants if you desire, as well as automatically sending these individuals an email. Rather than entering names every time an event is scheduled, you create a master address. The address book is created by selecting the "Address Book" link from the main task bar. Once the address book is created, the names appear in the Address Book window of the reservation form. From that list you can select who will attend. To move a person from the address book to the list of attendees, click on the desired name in the address book and then click the "Add Attendee" button.

(g) *Send email notifications to all attendees.* If you desire to send an automated email to the attendees, check the box "Send email notifications to all Attendees." If you desire a response, check the box "Request Attendee RSVP." To send the email you must first set-up the account management form (see section 3.4 above).

Once finished, click the "Book Reservations" button.

## **5. Viewing Schedules**

5.1 *Viewing the schedule of reservations.* To view existing reservations click on the "Schedules" link on the main task bar. A list will appear for each room or resource that has an existing reservation.

5.2 *Organizing an indexing the schedule data.* The "Schedule Window" contains the following five columns:

1. *Resource.* To organize the resources in alphabetical order, click on the heading "Resources" at the top of the column. Click it a second time to reverse the order.
2. *Capacity.* To organize the resources by capacity, click on the heading "Capacity" at the top of the column. Click it a second time to reverse the order.
3. *Resource Type.* To organize the resources alphabetically by resource type, click on the heading "Resource Type" at the top of the column. Click it a second time to reverse the order.
4. *Location.* To organize the resources alphabetically by location, click on the heading "Location" at the top of the column. Click it a second time to reverse the order. Click directly on the location to obtain more detailed information regarding that location.
5. *Action.* The last column is used to view more detailed information on each resource. See section 5.3 below on viewing specific schedules.

*5.3 View specific schedules.* To view the schedule for a specific room or resource, click the "view schedule" link on the corresponding line under the last column (Action). Once the "view schedule" link is selected, you have the option of viewing a daily, weekly, monthly, or, yearly schedule for the room or resource selected. The daily, weekly, monthly, and yearly view links are located directly above the small calendar in the right column. The shaded dates on the calendar indicate days for which a reservation exists. To view the information for a specific reservation, click on the corresponding date on the calendar.

*5.4 Reschedule or cancel an event.* While viewing the schedule for a specific room or resource (section 5.3), you have the option to reschedule or cancel the event. To reschedule the event, click on the reschedule link located to the right of the event. The scheduling form will appear and changes can be made. To cancel an event, click on the cancel link located to the right of the event. After selecting the cancel option, you will be given another option to cancel the event for that date only, or to cancel the entire reservation if the reservation involves more than one day.