

Resource Scheduler User Training

Office of School Services and Room Reservations

Room S3-104

(508) 856-2264

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Copy and Paste the training URL below to the web browser:

<http://ResourceSchedulerTraining.umassmed.edu/ResourceScheduler/>

THIS URL IS THE TRAINING SITE ONLY –
USE THIS LINK TO **PRACTICE** ENTERING
RESERVATIONS ONLY. IT IS NOT THE LIVE
SITE.

Personal Information

The screenshot shows the 'Personal Information - User ID: 18' page. It is divided into two main columns: 'Personal Information' and 'Options'.

Personal Information - User ID: 18

Name	Zirpola (Miller), Karen	
Email	<input type="text" value="karen.zirpola@umassmed.edu"/>	
Mobile Password	CHANGE	
NTLM Login	ZirpolaK	
Phone	<input type="text" value="508-856-5033"/>	(Ext.) <input type="text"/>
Business Unit	<input type="text" value="UMMS/School"/>	
Account Code	<input type="text" value="UMMS"/>	
Department	<input type="text" value="School Services/Room Reservations"/>	
User Picture	<div>No Image Found</div>	

Options

Language (Calendar)	<input type="text" value="English"/>
Country (Holidays)	<input type="text" value="United States"/>
Refresh (0 for no refresh)	<input type="text" value="0 Minute(s)"/>
Default Location	<input type="text" value="UMass Medical School"/>
Default Group	<input type="text" value="Medical School Rooms"/>
Default Calendar View	<input type="text" value="Day"/>
Time Format	<input type="text" value="12 Hour"/>

User Settings

Allow Assignments	<input checked="" type="checkbox"/>
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Email Options

Edit Notification Emails	<input checked="" type="checkbox"/>
Receive Confirmation Emails	<input checked="" type="checkbox"/>

Logging in For the First Time:

1. Go to our website: umassmed.edu/roomreservations then click “Book a Room”.
2. Enter your **Email Address (required)** or you will **NOT** be able to get back into Resource Scheduler.
3. Enter your 10 digit **Phone Number (required)**.
4. Enter your **Business Unit** and **Account Code** both are the same (**either UMMS or UMMHC**).
5. Enter your department and submit to return to the **Resource Scheduler Home Page**.
6. The **Resource Scheduler Home Page** is personalized to each user and becomes a personal desktop listing of all the users’ reservations (**My Reservations**).
7. **Home Page Layout** – use this to change the layout of your home page (top panel or bottom panel).

Note: If Resource Scheduler appears difficult to see, by changing the Screen size %, it can be enlarged.

*Internet Explorer: Tools, “Compatibly View Settings” should be unchecked and nothing should be listed.

Resource Scheduler Home Page

The screenshot shows the Resource Scheduler Home Page for the University of Massachusetts Medical School. The page is divided into three main sections: a left sidebar, a top navigation bar, and a main content area.

- Left Sidebar:** Contains a search bar and a tree view of resources. The tree view is expanded to show 'Medical School Rooms', which includes a list of rooms such as 'Amphitheater I S2-102', 'Amphitheater II S4-102', 'Amphitheater III S6-102', 'Faculty Conference Room S1-34', 'Goff Video Conference Room S2', 'Goff Computer Lab S2-307D', 'Goff S2-307 A/B', 'Goff S2-307 E/F', 'Goff S2-309 A', 'Goff S2-309 B', 'Goff S2-309 C', 'Goff S2-309 D', 'Hiatt Auditorium S1-608', 'Lazare Auditorium S1-607', 'Library Conference Room S1-605', and 'Medical School Lobby #1 S1-100'.
- Top Navigation Bar:** Includes the 'HOME' button, 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS' dropdown menu. The user's name 'Hello Zirpola (Miller), Karen' and a 'Help' link are also present.
- Main Content Area:** Divided into three sections:
 - My Reservations:** A list of reservations with details such as 'Rape Aggression Defense course' (Nov 23, 2016 4:30 PM - 9:30 PM) and 'Test' (Nov 24, 2016 9:00 AM - 10:00 AM).
 - My Favorites:** A calendar view showing availability for selected rooms. The calendar has columns for each hour from 5 AM to 10 PM. Reservations are shown as colored bars: 'FOM 2 Fall 2016' (red), 'AS2.2102 (AUD) Auditorium & Atrium area' (blue), 'Cube Function Room/Atriums/Lounge' (blue), 'Faculty Conference Room S1-342' (blue), 'Hiatt Auditorium S1-608' (blue), 'ITLC A S2-318' (red), 'Test' (blue), 'Interventio' (orange), 'N NG 603 A Fall Sen 2016' (orange), 'Rape Aggression Defense course' (grey), and 'N NG 613 Adv' (orange).
 - Room Reservations Approval Procedures** and **Room Reservations FAQs** links are at the bottom.

Resource Scheduler Home Page is divided into three sections:

1. On the left side under UMass Medical School is the list of **Resources/Rooms**.
2. **My Reservations** – a listing of all reservations by date the user has created or is the requested for.
3. **My Favorites** – Daily availability at a glance for the rooms that the user selects as favorites.

Reservation Wizard (page 6)

Planner (page 23)

Quick Links - One click access to all reservation information:

1. **Reservation Wizard**- The link used to enter all reservations.
2. **Search Reservations**- The link to define the criteria for searching reservations (refer to page 16).
3. **Display Resource Availability**- The link to check availability for a specific date (refer to page 16).
4. **Reservation Quick List**- This link allows you to search reservations for a specific date and time. This feature will show all of the reservations that are booked during that period of time.

Reservation Wizard: Step-by-Step for a Single Event Reservation

The screenshot shows the 'Reservation Wizard' page of the University of Massachusetts Medical School Resource Scheduler. The page has a navigation bar with links: HOME, RESERVATION WIZARD (highlighted), PLANNER, APPROVALS, REPORTS, and QUICK LINKS. The main content area is titled 'Scope' and includes several dropdown menus: 'UMass Medical School', 'UMMS', 'All Resource Types', and 'US - Massachusetts...'. There is also a 'Filter' button. Below the 'Scope' section is the 'Date/Time' section, which includes a date range selector (02/20/2017 to 02/20/2017) and a time range selector (01:00 PM to 03:00 PM). There are also radio buttons for 'Recurring' (None, Daily, Weekly, Monthly) and a checkbox for 'Only Available Resources'. At the bottom of the form are 'NEXT' and 'CLEAR' buttons. Below the form, there are links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's'.

From the Resource Scheduler Home Page:

1. Click on **Reservation Wizard** - at the top of the page or under **Quick Links**. (The information entered here will define the search of available rooms for an event.)
2. **Scope**: Select which building you are looking for, you may pick more than one at a time.
3. To find all available rooms for an event, skip down to **Start Date**. Click on the calendar icon under **Date/Time** and select the date by clicking on it.
4. Select a **Start Time** and **End Time** (pull down menu for AM & PM)
5. The **End Date** will fill in automatically with the same date as the **Start Date**.
6. Under **Recurring** the default is **none**, this is the setting for single reservation.

Click Next and the **Search Results** page will open with all available rooms.

Search Results

The screenshot shows a web interface for searching room reservations. At the top, there are input fields for 'Reservation Name', '# Of Attendees' (set to 0), and a 'General' dropdown menu. A 'Private' checkbox is checked. Below this is a list of rooms on the left, each with a checkbox and a dropdown for 'No set up required (0)'. The room list includes: UMMS: Amphitheater I S2-102 (210), UMMS: Amphitheater II S4-102 (195), UMMS: Amphitheater III S6-102 (195), UMMS: Faculty Conference Room S1-342 (150), UMMS: Medical School Lobby #1 S1-100L2 (150), UMMS: Lazare Auditorium S1-607 (110), UMMS: Hiatt Auditorium S1-608 (95), UMMS: Library Conference Room S1-605 (29), UMMS: New Medical School Lobby S1-30L1 (75), UMMS: Room S1-123 (30), UMMS: Goff S2-307 A/B (16), UMMS: Goff Video Conference Room S2-307C (14), UMMS: Goff S2-309 A (21), UMMS: Goff S2-309 B (30), UMMS: Goff S2-309 C (30), UMMS: Goff S2-309 D (20), and UMMS: Room S2-351 (35). On the right, a calendar grid for Monday, February 20, 2017, shows time slots from 12 PM to 11 PM. A red arrow points to the 1 PM slot. A red bar is visible in the 6 PM slot, and a yellow bar is visible in the 4 PM slot.

The **Search Results** page displays a list of available rooms for the date and time selected. The white area on the right is the time being requested.

1. By clicking on the room itself a **Description Page** opens with a description and a picture of the room at the bottom (by clicking on it, it will remain open to scroll up and down). You can also view the room when you select a room from the home page, then click on the room title.
2. Select a room or rooms by checking on the box to the left of each room. (you may select more than one room if you need to)
3. At the top of the page, fill out the **Reservation Name**, the **# Of Attendees**, and **Color** (a pull down menu - choose one that **BEST** describes the event).
4. Click **Submit** at the bottom of the page.
5. The **Reservation Confirmation** page opens with the details of the reservation.

NOTE: The Faculty Conference Room (FCR) requires a half hour set up and breakdown time that is automatically added to the reservation. If there is an event immediately before or following the time being booked an error message will appear “Resources Not Available” and the start or end time of the event will have to be adjusted.

Reservation Confirmation

The screenshot displays the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The page is titled 'Reservation Confirmation' and is part of a 'RESERVATION WIZARD' process. It is divided into three main sections: 'Primary Information', 'Reservation Description', and 'Additional Information'. The 'Primary Information' section lists the reservation title 'Test', reference number '-1999802472', and creator 'Resource Scheduler'. The 'Reservation Description' section shows the date and time: 'Monday, February 20, 2017 1:00 PM' to 'Monday, February 20, 2017 3:00 PM' in 'US - Massachusetts (Eastern)'. The 'Additional Information' section shows 'No Catering' is 'allowed in this room.' and 'Custom Tabs' are '- No Options -'. At the bottom, there are four tabs: 'PIM', 'EDIT', 'FINISHED', and 'PRINT'. The 'FINISHED' tab is currently selected. The page also includes a navigation bar with links to 'HOME', 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS', and a user greeting 'Hello Resource Scheduler'.

Primary Information		Resources
Reservation Title	Test	UMass Medical School - Medical School Rooms - Hiatt Auditorium S1-608
Reference Number	-1999802472	
Created By	Resource Scheduler	

Reservation Description	
Date and Time	
Starting	Monday, February 20, 2017 1:00 PM US - Massachusetts (Eastern)
Ending	Monday, February 20, 2017 3:00 PM US - Massachusetts (Eastern)

Additional Information	
Options	Custom Tabs
No Catering	- No Options -
allowed in this room.	

PIM EDIT FINISHED PRINT

[Room Reservations Approval Procedures](#) [Room Reservations FAQ's](#)

1. On the left side under **Primary Information** the **Reservation Title**, **Reference Number** and **Created By** information is listed.
2. Below that is the **Reservation Description** with date and time.
3. On the right side is the **Resource** (rooms).
4. There are four tabs at the bottom of the page.
5. Click on the **Edit** button to open the **Reservation Details** page in order to complete the required fields.
6. **PIM** is not a working feature.

Reservation Details Page

Click the **Options Tab** -This must be filled out first – they are in **RED** print.

1. **Account Code** – a pull down menu, select **UMMS or UMMHC**. (Default is **UMMS**)
2. **Second Contact** - other than you, who we can contact if there are any questions concerning the event. (Students need to use their faculty advisor as their second contact)
3. **Contact Phone** – a full phone number is required. (508-856-2264)
4. **Catering Needed** – a pull down menu – select yes or no. (select yes if you need a food room)
5. **A/V needed** – a pull down menu – select yes or no.
6. **Reservation Types** – select one that best describes the event.

If you need to write a reservation description, add a host or add a recurring click **DETAILS**. If you are finished click **SAVE**.

On Behalf Of

Resource Scheduler - Reservation Details - Reservation Request Info - Google Chrome

Test | Feb 20, 2017 1:00 PM - Feb 20, 2017 3:00 PM | US - Massachusetts (Eastern)
UMass Medical School; UMMS; Hiatt Auditorium S1-608

User List
Address Books

Requested For

Name

Email

Phone

Account Code:

☒ Send Email Notices

Requested By

Name

Email

Phone

☒ Send Email Notices

Room Reservations Approval Procedures Room Reservations FAQ's

Goff S2-309 D
Hiatt Auditorium S1-608
Lazare Auditorium S1-607

Worcester County Beekeepers Association

Mar 2, 2017 Mar 2, 2017 6:00 10:00 UMass Medical School-UMMS

Various Bee Club members for

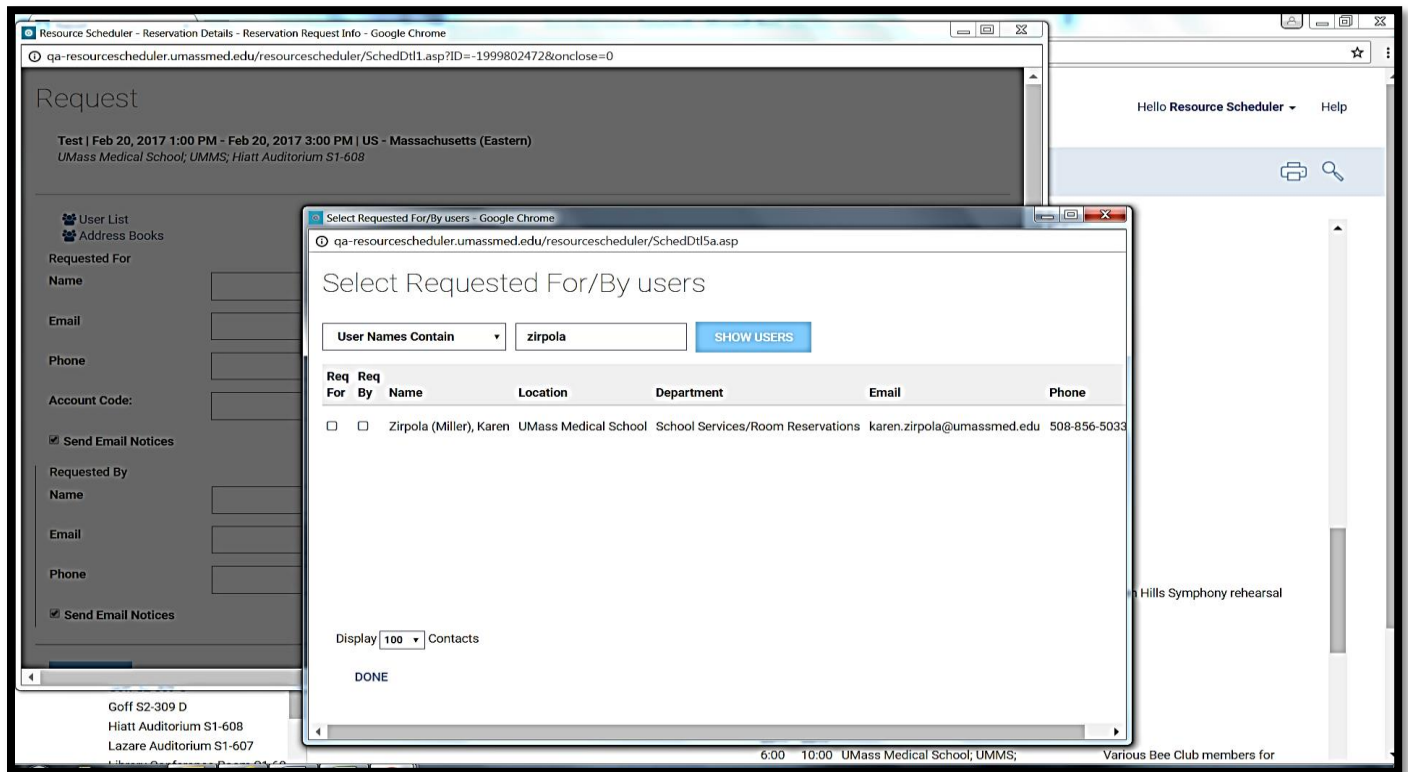
Hello Resource Scheduler Help

Room S2-309

Seven Hills Symphony rehearsal

1. On the **Reservation Details** page next to **HOST** click **MORE** to display the Requested for and Requested By.
2. A **Requested For** should be filled out with the name of the person who requested the reservation or it can be the same as the person creating the reservation. A '**Requested For**' contact (only if selected from the Resource Scheduler User list) will be able to see the reservation under **My Reservations** on that user's **Home Page** and has permission to make changes. The user who created the reservation will also see it under **My Reservations**.
3. **Requested By** user does not see the reservation under **My Reservations** and does not have permission to make changes.
4. The On Behalf of information can be entered manually, selected from the **Resource Scheduler User List**. If you type in names manually "**Requested For**" CANNOT make changes or see it under "My Reservations."

Resource Scheduler User List



1. To select from the **Resource Scheduler User List** click on it. The list of users will open.
2. Select “User Names Contain” then in the “Search Criteria Box” type in the last name and click **Show Users**. Check **Requested For** or **Requested By** to the left of the contact’s name.
3. Click **Done**.
4. Check whether the contact should be sent emails.
5. Click **Submit** to complete this section and return to the **Reservation Details Page**.
6. Reservations for large function spaces (**Faculty Conference Room, Medical School Lobby, Blais Pavilion, ASC Multi-Purpose Room, ASC Auditorium**) must have the **Reservation Description** filled out with the details of the event prior to approval. This should be a brief description of the event and the set details for EBS. Once the information is filled out you will be notified if your reservation is approved.
7. Click **Save**, the **Reservation Confirmation** page will open.
8. Click **Finished**, the **Reservation Wizard** will open. To create a new reservation click **Clear**.
9. To return to the **Home Page**, click **Home** on the top left of the page.
10. All reservations created will be listed by date under **My Reservations**.

Approvals

Resource Scheduler - Reservation Details - Google Chrome

qa-resourcescheduler.umassmed.edu/resourcescheduler/schedDtl.asp?NoApprove=1&ID=-1999802468

Test2 ID: -1999802468 US - Massachusetts (Eastern) CANCEL SAVE MORE

12/16/2016 01:00 PM To 12/16/2016 03:00 PM Repeat...

Details Options History

Host Room Reservations / More...

Invite Cote, Cynthia (1) Attendees

Description

General # Of Attendees 30 Private ☒ Flag for Follow-up ☐

Setup Time 15 Cleanup Time 15

ADD RESOURCES + REMOVE ALL

UMass Medical School - UMMS

Room S2-310 (40) - Pending

1. All reservations place a hold on the room(s) selected **Pending Approval** by room reservations.
2. To view a reservation to see if it's pending or approved, click on the reservation from your **Home Page**. The **Reservation Details** page will open.
3. If the reservation is pending, the word **Pending** is noted to the right of each resource/room.
4. When the reservation is approved, the word **Pending** is replaced with **Approved** to the right of the resource/room and the notation (**This reservation is pending approval**) will be gone.
5. In addition, an email is generated to notify the user. (**DO NOT REPLY TO THESE GENERATED EMAILS THEY ARE NOT READ**)
6. If you make a change (add another room, change the time etc.) the reservation will need to be approved again.

Note: The '?' on the calendar view page in front of the reservation name is a visual indicator that the reservation is pending approval. Once the reservation is approved the '?' mark goes away.

Emailing and other options from the Reservation Details Page

Resource Scheduler - Reservation Details - Google Chrome

qa-resourcescheduler.umassmed.edu/resourcescheduler/schedDtl.asp?NoApprove=1&ID=-1999802468

Test2 ID: -1999802468 US - Massachusetts (Eastern)

CANCEL SAVE MORE

12/16/2016 01:00 PM To 12/16/2016 03:00 PM Repeat...

Details Options History

Host Room Reservations / More...

Invite Cote, Cynthia (1) Attendees

Description

General # Of Attendees 30 Private Flag for Follow-up

Setup Time 15 Cleanup Time 15

ADD RESOURCES + REMOVE ALL

UMass Medical School - UMMS

Room S2-310 (40) - Pending

Emailing a reservation to participants:

1. To email a reservation to all participants, open the **Reservation Details Page**. To the right side of the invite box click **ATTENDEES**. Participants can be entered manually or selected from the **Resource Scheduler User List** or the **Personal Address Book**. Complete the **Name**, **Company** (department), **Email** and **Phone** of all participants.
2. On a recurring reservation, go to the bottom of the page and click whether the participants are to be added to **Only This Reservation** or **This and All Future Instances**.
3. Click **Submit** and return to the **Reservation Details Page**.
4. On the top right corner of the page, click **MORE** and select **email**.
5. The **Edit Email Notification** page will open. Confirm the email addresses are correct and click **Submit**. An email will be sent with the details of the reservation to all the participants. On a recurring reservation, all the dates on the reservation will be sent.
6. There is a **Print** button that will print the entire reservation, and a **Delete** button.
7. **Download** and **Publish** are not working features at this time.

Copy Feature

Resource Scheduler - Copy Reservation - Google Chrome

qa-resourcescheduler.umassmed.edu/resourcescheduler/schedcopy.asp?ID=-1999802474

Copy Reservation

Description

Reservation Name:

Private: ☒

Color:

Of Attendees:

Reservation Description:

☒ Copy Attendees & Visitors

☒ Copy Requested For/By

☒ Copy Option Information

Time

Start *:

End *:

Setup Time: Cleanup Time:

Resources

▼ UMass Medical School - UMMS

- ☒ / Amphitheater I S2-102 (210) - Pending (Approvals)
- ☒ / Room S2-310 (40) - Pending (Approvals)

[Room Reservations Approval Procedures](#) [Room Reservations FAQ's](#)

1. From **The Reservation Details** page, use the **MORE** dropdown in the right hand corner.
2. The **Copy Reservation** page opens.
3. On the bottom left, check which items from the existing reservation are to be copied:
 - Copy Attendees and Visitors
 - Copy Requested For/By
 - Copy Option Information
4. Under **Time** on the top right, the time of the reservation will be the same as the copied reservation (it can be changed). A new **Start** and **End** date must be selected by clicking the calendar icon and selecting a date.
5. The **Resources/Rooms** will be the same as the copied reservation.
6. Click **Copy** on the bottom left of the page.
7. The **Reservation Details** page for the copied reservation will open.
8. Click **Save** and the copied reservation is complete.
9. The copied reservation can be found under **My Reservations** on the **Home Page**.

Home Page Features

The screenshot displays the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The top navigation bar includes 'HOME', 'RESERVATION WIZARD', 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS'. A sidebar on the left lists various rooms under 'Medical School Rooms', including Amphitheater I S2-102, Faculty Conference Room S1-342, and Goff Video Conference Room S2-307C. The main area features a 'My Favorites' calendar view for December 1, 2016, showing room availability and reservations. Below the calendar is a 'My Reservations' section with details for 'Vendor Days FY16', 'Lunch time', 'SOM Classes', and 'SLAA Meeting'. The bottom of the page contains links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's'.

My Favorites -This feature allows users to see daily availability of their favorite rooms.

From the **Home Page** click on a room and next to the room capacity click on the little star and either add favorite or delete from favorite. The room will be listed under **My Favorites**. By adding a room to **My Favorites**, the user has daily availability of that room at a glance.

Description of a Room - You can view the room when you select a room from the home page, then click on the room title and it will bring up a window with all of the room details. If you scroll to the bottom of this window you will see the picture of the room. Click on the image of the room and you will see a 360 view.

Search Reservations and Display Resource Availability

The screenshot shows the 'Search Reservations' page of the Resource Scheduler. The header includes the University of Massachusetts Medical School logo, the title 'Resource Scheduler', and a user greeting 'Hello Resource Scheduler'. A navigation bar contains links for HOME, RESERVATION WIZARD, PLANNER, APPROVALS, REPORTS, and QUICK LINKS. The main content area is titled 'Search Reservations' and includes a 'Scope' section with dropdowns for 'Locations (2)', 'All Groups', and 'All Resource Types', and a text input for a user count. The 'Date' section has radio buttons for 'Current and future dates', 'Dates in the past', and 'Specify', with corresponding 'Start Date' and 'End Date' fields set to 12/15/2016. The 'Advanced' section includes a 'Text Search' input, checkboxes for 'Search Options Text', 'Search Custom Tabs', 'Search Deleted Reservations', and 'Include Conflict Reservations', and fields for 'Reservation Number' (1999803695), 'User Contact' (with a selection icon), 'Contact Role' (Any), and 'Group By' (Reservation Date). At the bottom are 'SHOW...' and 'CLEAR' buttons, and links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's'.

Search Reservations - (Under Quick Links dropdown)

1. **Scope** - Select which building you are looking for you may pick more than one.
2. **Date** – You can look for future, dates in the past or select a specific date.
3. **Advanced** – you can search by reservation number, user or title.
4. **User Contact** – Click on the silver box which will open a select user window. In the Search Criteria box type your last name. Click Search and select the correct name. This will automatically be added to the user contact box.
5. **Show**- to view the reservations that you were searching for.

The screenshot shows the 'Resource Availability Search' page of the Resource Scheduler. The header is identical to the previous page. The main content area is titled 'Resource Availability Search' and includes a 'Scope' section with dropdowns for 'UMass Medical School', 'UMMS', and 'All Resource Types', and a text input for a user count, followed by a 'Filter' button. The 'Date/Time' section has date and time pickers for '12/09/2016' from '07:00 AM' to '05:00 PM' on '12/09/2016', and a 'Show Availability in Timezone' dropdown set to 'US - Massachusetts (Eastern)'. The 'Advanced' section includes a 'Day Of Week' row with checkboxes for S, M, T, W, T, F, S, a 'Resource Setup' button labeled 'SELECT', and a 'Results' dropdown set to 'Only Available Resources'. At the bottom are 'SUBMIT' and 'CLEAR' buttons, and links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's'.

Resource Availability Search – (Under Quick Links dropdown) select the building and resource type then the date you are looking for and click Submit. In the next window a room availability list will appear with what's available. To **View** the rooms click on the **Room Title**.

Recurring Reservation

The screenshot shows the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The page is titled 'Search Wizard' and includes a navigation bar with links for HOME, RESERVATION WIZARD (highlighted), PLANNER, APPROVALS, REPORTS, and QUICK LINKS. The main content area is divided into sections for 'Scope' and 'Date/Time'. The 'Scope' section includes dropdown menus for location (UMass Medical School), building (UMMS), resource type (All Resource Types), and a search filter (US - Massachusett...). The 'Date/Time' section includes date and time pickers for start and end times, a recurring selection (None, Daily, Weekly, Monthly), and an 'Until' date picker. Below these are options for recurring frequency (The 1st day of every 1 month(s) or The 1st Monday of every 1 month(s)). At the bottom, there are 'NEXT' and 'CLEAR' buttons, and links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's'.

1. Click **Reservation Wizard** - at the top of the page or under **Quick Links**.
2. **Scope** select location leave attendees **0** to see more availability.
3. Add the **Start Date** and time. Select 1 of 3 recurring options: **Daily**, **Weekly** or **Monthly**.
4. Enter the **End Date**.
 - For **Daily** select:
 - a. Every **1** Day(s) OR
 - b. Every Weekday
 - For **Weekly** select:
 - c. Every **1** Week (s)
 - d. Check off the day(s) of the week
 - For **Monthly** select:
 - e. The **1st** day of every **1** month(s) OR
 - f. The **1st** **Sunday** of every **1** month (s)
5. Next **Search Results** page will be displayed.

Search Results

Training 15 General Private

UMass: UMass Medical School -

Monday, December 05, 2016 (US - Massachusetts (Eastern))

12 PM 1 PM 2 PM 3 PM 4 PM 5 PM 6 PM 7 PM 8 PM 9 PM 10 PM 11 PM

UMMS: Medical School Lobby #1 S1-100L2 (150) No set up required (0)

UMMS: Library Conference Room S1-605 (29)

UMMS: New Medical School Lobby S1-30L1 (75) No set up required (0)

UMMS: Goff Computer Lab S2-307D (15)

UMMS: Room S7-106 (20)

UMMS: SWE Room S3-436 (15)

UMMS: SWE Room S6-436 (15)

UMMS: SWE Room S4-402 (18)

UMMS: SWE Room S5-402 (18)

UMMS: SWE Room S6-402 (18)

UMMS: SWE Room S7-402 (18)

UMMS: Medical School Lobby-Only 1 Table (2) Select

UMMS: Room S2-205 (14) Swipecard located in S3-104

UMMS: Room S2-310 (40)

UMMS: SWE Room S7-436 (15)

UMMS: Goff S2-307 E/F (16)

Academic SOM Academic GSN Academic GSBS UMMS/Administration Student UMMHC/Administration Chancellor/Dean General Grand Rounds External

SUBMIT RETURN

Room Reservations Approval Procedures Room Reservations FAQ's

- Check the appropriate room; add a **meeting title** and **number of attendees & color** (a pull down menu).
- **Submit**.

University of Massachusetts UMass Medical School Resource Scheduler Hello Resource Scheduler Help

HOME RESERVATION WIZARD PLANNER APPROVALS REPORTS QUICK LINKS

Reservation Confirmation

Primary Information

Reservation Title	Training	Resources	UMass Medical School - Medical School Rooms - Room S7-106
Reference Number	-1999802452		
Created By	Resource Scheduler		

Reservation Description

Date and Time

Starting Monday, December 5, 2016 2:00 PM US - Massachusetts (Eastern)

Ending Monday, December 5, 2016 3:00 PM US - Massachusetts (Eastern)

Recurring On The 1st Monday Of Every Month Until Saturday, April 29, 2017

Additional Information

Options

Custom Tabs

- No Options -

PIM EDIT FINISHED PRINT

6. Click **Edit** to finish your reservation. The **Reservation Confirmation** page will open with the details of the reservation. (Refer to page 9).

Feature for recurring reservations only

The screenshot shows a reservation form for a recurring event. At the top, there's a header with 'Test' in a search box, ID: -1999802457, and location: US - Massachusetts (Eastern). On the right are 'CANCEL', 'SAVE', and 'MORE' buttons. Below this is a date and time selector showing '01/06/2017' at '02:00 PM' to '01/06/2017' at '03:00 PM'. A red arrow points to the 'Repeat...' checkbox, which is checked. Below the date selector, it says 'Recurring On The 1st Friday Of Every Month Until Saturday, May 20, 2017'. There are tabs for 'Details', 'Options', and 'History'. The 'Details' tab is active, showing fields for 'Host' (Cote, Cynthia), 'Invite' (Cote, Cynthia), and 'Description'. Below these are settings for '# Of Attendees' (10), 'Private' (checked), 'Flag for Follow-up' (unchecked), 'Setup Time' (0), and 'Cleanup Time' (0). At the bottom, there are 'ADD RESOURCES' and 'REMOVE ALL' buttons. A resource selection box is open, showing 'UMass Medical School - UMMS' and 'Room S7-106 (20) - Pending'.

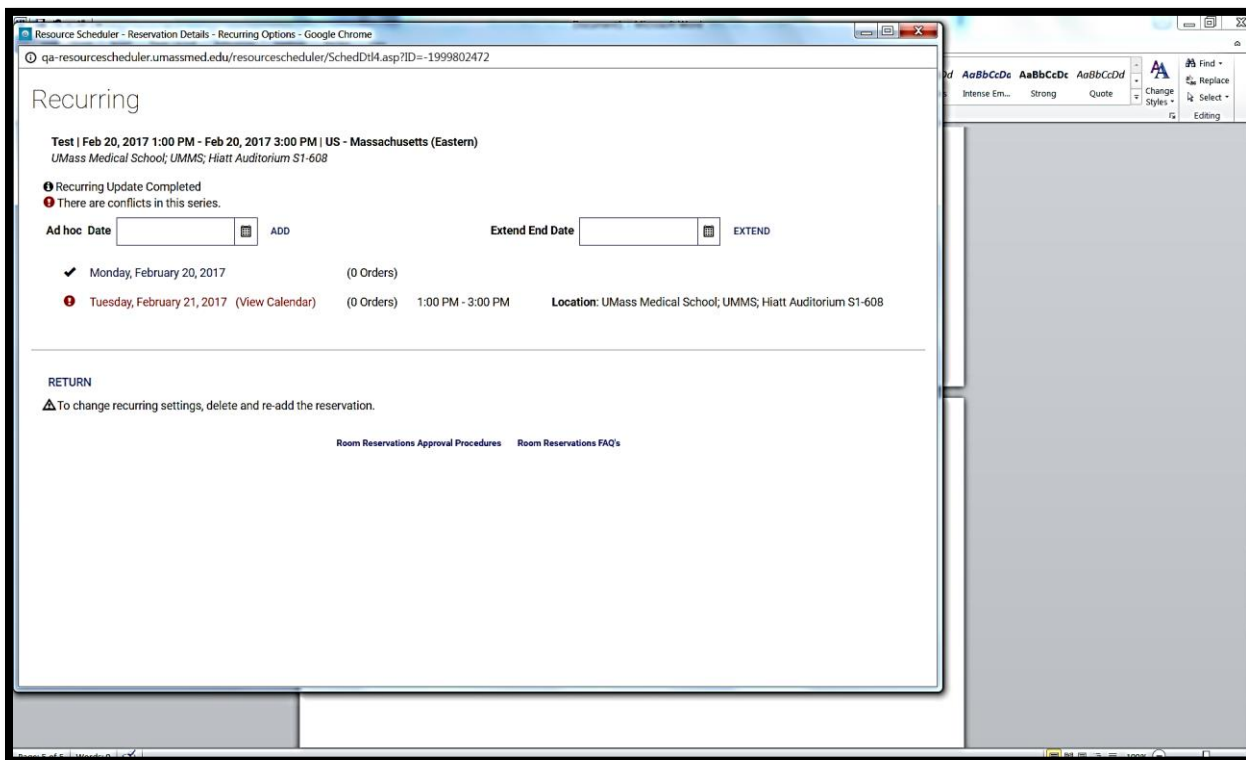
The screenshot shows the 'Recurring' page for the reservation. It displays the event details: 'Test | Jan 6, 2017 2:00 PM - Jan 6, 2017 3:00 PM | US - Massachusetts (Eastern)' and 'UMass Medical School; UMMS; Room S7-106'. There are 'Ad hoc Date' and 'Extend End Date' fields with 'ADD' and 'EXTEND' buttons. Below these is a list of dates for the recurring reservation, each with a checkmark and '(0 Orders)'. The dates are: Friday, December 2, 2016; Friday, January 6, 2017; Friday, February 3, 2017; Friday, March 3, 2017; Friday, April 7, 2017; and Friday, May 5, 2017. At the bottom, there is a 'RETURN' button and a note: 'To change recurring settings, delete and re-add the reservation.' Links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's' are also present.

Note: One of these two options must be selected anytime a change is made to the reservation. After edits are made click **SAVE** and choose **Only This Event** or **This and Future Events**.

- To see the list of dates click **Repeat** and the recurring page will open.

Recurring continued and Conflicts!

1. The list of dates on the recurring reservation is displayed. Next to each date is a **black check mark**. The **black checkmark** indicates the date is scheduled and there have been no changes to the reservation on that date.
2. When a change is made to the reservation on a single date, the **black check mark** is replaced by a **black flag**.
3. If there is a conflict, there will be a **red exclamation mark**. The red exclamation indicates the **date is not scheduled**. A different room must be selected and then the room in conflict must be deleted to resolve the conflict.
4. Reservations for large function spaces (**Faculty Conference Room, Medical School Lobby, Blais Pavilion, ASC Multi-Purpose Room, ASC Auditorium**) must have the **Reservation Description** filled out with the details of the event prior to approval. This should be a brief description of the event and the set details for EBS. Once the information is filled out you will be notified if your reservation is approved.
5. Click **Save** and the **Reservation Confirmation** page will open.



1. On the **Recurring Options** page on the left hand corner there will be a red exclamation mark and the words **“There are conflicts in this series”**. **All Conflicts must be resolved or the reservation won’t be approved.**
2. There will be a red exclamation mark next to each date there is a conflict and the date is in red. When there is a conflict, the room is **not** scheduled.
3. Click on the day and date of the conflict, in red print and the **Reservation Details** page for that date will open.
4. Click on **Add Resources** on the **Reservation Details** page and the **Resources** page opens. Choose the location (for the room search) from the pull down menu, and click **Show**. A list of available rooms will be displayed. Select a room by checking the box to the left of the room, and click **Submit**.
5. The **Reservation Details** page for that date will open. Under **Resources** the room that has a conflict will be in red. To remove it click the **X** in the box on the right of the room highlighted in red.
6. Click **Save** and select **Only This Event** or **This and All Future Events**.

An alternate way to Book a Recurring Event

Resource Scheduler - Reservation Details - Recurring Options - Google Chrome
qa-resourcescheduler.umassmed.edu/resourcescheduler/SchedDt4.asp?ID=-1999802468&recurType=0

Recurring

Test2 | Dec 16, 2016 1:00 PM - Dec 16, 2016 3:00 PM | US - Massachusetts (Eastern)
UMass Medical School; UMMS; Room S2-310

☐ **Daily, until** 12/16/2016
Recurring
☒ Every 1 Day(s)
☐ Every Weekday

☐ **Weekly, until** 12/16/2016
Recurring
Every 1 Week(s)
☐ Sunday ☐ Monday
☐ Tuesday ☐ Wednesday
☐ Thursday ☒ Friday
☐ Saturday

☒ **Monthly, until** 03/25/2017
Recurring
☐ The 1st day of every 1 month(s)
☒ The 2nd Wednesday of every 1 month(s)

☐ **Ad hoc**
Date 12/19/2016 Add

☐ Treat recurring schedule as separate bookings

[SUBMIT](#) [RETURN](#)

[Room Reservations Approval Procedures](#) [Room Reservations FAQ's](#)

1. Using the wizard select your first room in the series. After filling out your second contact person under options select repeat top of the Reservation details page next to end time (refer to the red arrow on page 19).
2. You will come to the page above. Select 1 of 3 recurring options: **Daily, Weekly or Monthly** and add an end date in the appropriate box. Click Submit.
3. If you have **Conflicts** they will need to be fixed (refer to page 20).

Revising a Reservation

Testing QA ID: -1999802416 US - Massachusetts (Eastern) CANCEL SAVE MORE

12/19/2016 09:00 AM To 12/19/2016 10:00 AM Repeat...

Details Options ! History

Host Resource Scheduler i More...

Invite Resource Scheduler (1) Attendees

Description

General # Of Attendees 20 Private ☒ Flag for Follow-up ☐

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

UMass Medical School - UMMS

Room S7-105 (25) - Approved

1. To make changes to a reservation, open to the **Reservation Details** page. Changes can be made to the following: time, date, contact information, event name, room selection, # of attendees, etc.
2. To change a room, click **Add Resources+** above the room you already have. **Resources** page opens. Choose the location from the pull down menu, and click **Show**. A list of available rooms will be displayed. Select a room by checking off the box to the left of the room, and click **Submit**.
3. To remove a room, click the **X** to the right of the room to be released. A room cannot be deleted until a new room is chosen.
4. When finished making all changes click **Save** to return to the **Reservation Confirmation** page.
5. Click **Save** and the changes are complete. To review any changes, go to the **Home Page** and find the reservation under **My Reservations**.
6. If you need to change the time or the number of attendees you may also do this from this page then select **SAVE**.

Planner

University of Massachusetts Medical School Resource Scheduler

HOME RESERVATION WIZARD **PLANNER** APPROVALS REPORTS QUICK LINKS

Planner View

Search Options

UMass Medical School All 0 12/20/2016 US - Massachusett...

Display Settings: Title, Event Status: All, Event: All

Reservation Custom Tabs: All, Reservation Type: All, Host Name:

SEARCH CLEAR Less Options

Tuesday, December 20, 2016 (US - Massachusetts (Eastern) Time Zone)

	12am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm
-- UMass: UMass Medical School -- Tuesday, December 20, 2016 (US - Massachusetts (Eastern))																								
UMMS: Amphitheater I S2-102																								
UMMS: Amphitheater II S4-102																								
UMMS: Amphitheater III S6-102																								
UMMS: Faculty Conference Room S1-342																								

Academic SOM Academic GSN Academic GSBS UMMS/Administration Student UMMHC/Administration Chancellor/Dean General Grand Rounds External

The Planner View allows you to view quickly what is available on the date and time that you select.

1. Search options and select which building you are looking for and the date. There are two views select either **More Options** or **Less Options**. Scroll up or down.
2. To **View** the rooms click on the **Room Title**.

University of Massachusetts Medical School Resource Scheduler

HOME RESERVATION WIZARD **PLANNER** APPROVALS REPORTS QUICK LINKS

Tuesday, December 20, 2016 (US - Massachusetts (Eastern) Time Zone)

Show +

	12am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm
-- UMass: UMass Medical School -- Tuesday, December 20, 2016 (US - Massachusetts (Eastern))																								
UMMS: Amphitheater I S2-102																								
UMMS: Amphitheater II S4-102																								
UMMS: Amphitheater III S6-102																								
UMMS: Faculty Conference Room S1-342																								
UMMS: Medical School Lobby #1 S1-100L2																								
UMMS: Lazare Auditorium S1-607																								
UMMS: Hiatt Auditorium S1-608																								
UMMS: Library Conference Room S1-605																								
UMMS: New Medical School Lobby S1-30L1																								
UMMS: Room S1-123																								
UMMS: Goff S2-307 A/B																								
UMMS: Goff Video Conference Room S2-307																								
UMMS: Goff Computer Lab S2-307D																								

Academic SOM Academic GSN Academic GSBS UMMS/Administration Student UMMHC/Administration Chancellor/Dean General Grand Rounds External

Ad Hoc – Adding a single date to a reservation

Resource Scheduler - Reservation Details - Recurring Options - Google Chrome

qa-resourcescheduler.umassmed.edu/resourcescheduler/SchedDt4.asp?ID=-1999802468&recurType=0

Recurring

Test2 | Dec 16, 2016 1:00 PM - Dec 16, 2016 3:00 PM | US - Massachusetts (Eastern)
UMass Medical School; UMMS; Room S2-310

☐ **Daily, until** 12/16/2016

Recurring

☒ Every 1 Day(s)

☐ Every Weekday

☐ **Weekly, until** 12/16/2016

Recurring

Every 1 Week(s)

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☒ Friday ☐ Saturday

☐ **Monthly, until** 12/16/2016

Recurring

☒ The 1st day of every 1 month(s)

☐ The 1st Sunday of every 1 month(s)

☒ **Ad hoc**

Date 12/19/2016 Add

☐ Treat recurring schedule as separate bookings

SUBMIT **RETURN**

[Room Reservations Approval Procedures](#) [Room Reservations FAQ's](#)

1. **Ad Hoc** allows the user to add a single date to a reservation, single event or recurring.
2. From the **Reservation Details** page, click on **Options**, the recurring page will open. Select **Ad Hoc**, by clicking on the circle to the left of it. Select the date to be added by clicking on the calendar icon to the right of **Date**, below the words **Ad Hoc**. Select the date, and click **Add**. The recurring details page will open. (**Ad Hoc** is the only way to add a single date to a recurring reservation).
3. The **Ad Hoc** date selected will be displayed in the list of recurring dates on the reservation with the same room and time as the first date on the reservation. Click **Return** and then click **Save and Done**.
4. An **Ad Hoc** date is added to a single event reservation the same way. A single event reservation can also be changed to a recurring event. Click on **Options**, the recurring page will open. Choose the type of recurring event; daily, weekly or monthly. Choose the frequency of the recurrence and the when the reservation is recurring until, by choosing a date from the calendar icon. Click **Submit** at the bottom of the page and the **Reservation Details** page will open. If there are no changes, click **Save and Done**.
5. The **Reservation Confirmation** page will open. Click **Finished** and then **Home** to return to the **Home Page**.

Deleting a Reservation

Resource Scheduler - Reservation Details - Google Chrome

qa-resourcescheduler.umassmed.edu/resourcescheduler/SchedDtl.asp?ValidEmail=1&ID=-1999802476

Test ID: -1999802476 US - Massachusetts (Eastern) CANCEL SAVE MORE

11/26/2016 09:00 AM To 11/26/2016 10:00 AM ☒ Repeat...

Details Options History

Host Zirpola (Miller), Karen / Zirpola (Miller), Karen / More...

Invite Cote, Cynthia

Description Testing QA

General # Of Attendees 50 Private ☒ Flag for Follow-up ☐

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

UMass Medical School - UMMS

Amphitheater I S2-102 (210) - Pending

Room S2-310 (40) - Pending

PRINT
EMAIL
COPY
DOWNLOAD
PUBLISH
DELETE SERIES
DELETE EVENT

1. **Reservation Details** page to delete a single event reservation select **MORE** than **Delete**.
2. A “Continue with delete of this schedule?” window will open. Click **OK**, the reservation is deleted.
3. On recurring event reservations select **Delete Series**. A “Continue with the delete of this schedule?” window will open. Click **OK**, the **Series** is deleted.
4. If you would like to delete one room from your reservation click the **X** next to the room you wish to delete.

