Resource Scheduler User Training

Room Reservations

Room S2-243

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Personal Information

Logging in For the First Time:

1. Website:  https://umassmed.resourcescheduler.net/resourcescheduler/default.asp if the above Personal Information page doesn’t open immediately “click book a room”

2. Enter your **Email Address (required)** or you will NOT be able to get back into Resource Scheduler the software will lock you out. If this happens please contact RoomReservations@umassmed.edu

3. Enter your **Phone Number (required)**, Business Unit (either UMMS or UMMHC) Department, and Speed Type/Cost Center must be added to use Services.
4. Nothing should be changed on the right-hand side except: **Home Page Layout** (bottom right) – use this to change the layout of your home page (top panel or bottom panel). You can change the layout of your home page based on how you want it to look.

5. The **Resource Scheduler Home Page** is personalized to each user and becomes a personal desktop listing of all the users’ reservations (**Listed under My Reservations**). Click **Submit**.

**Resource Scheduler Home Page**

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**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. 3. **My Favorites**: Daily availability for the rooms that the user selects as favorites.

**Reservation Wizard**: (refer to page 5-10)
**Planner**: (refer to page 22)

**Under Quick Links (drop-down)**: One click accesses all reservation information:

1. **Reservation Wizard**: This link is used to search for all available space. (refer to page 5-10)
2. **Search Reservations:** This link is for searching reservations that are either booked in the future or in the past. (refer to page 15).

3. **Display Resource Availability:** This link is to check availability for a specific date (refer to page 15).

4. **Reservation Quick List:** This link allows you to search reservations for a specific date and time. This feature will show all the reservations that are booked during that period.

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

![Reservation Wizard Screenshot]

**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 a location, you may pick more than one at a time, by highlighting the location, keep it **All Groups, all Resource Types, US-Massachusetts,** and if you keep the people **0** it will show you more available rooms.

3. Click on the calendar icon under **Date/Time** and select the date by clicking on it.
4. Select a **Start Time** and **End Time** (drop-down menu for AM & PM)

5. Under **Recurring** the default is **none**, this is the setting for single reservation. (for recurring see pages 16-20)

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

**Search Results**
The **Search Results** page displays a list of available rooms for the date and time selected in the shaded area.

1. By clicking on the room (listed at the left) a **Description Page** opens with a description and a picture of the room at the bottom (by clicking on it, it will remain open). 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) Some rooms require you to select a set up in the drop down to the right of the room. It will **NOT** move forward without a selection.
3. At the top of the page, fill out the **Reservation Name**, the **# Of Attendees**, and the drop-down menu next to General. This is the **Color** of the **Reserving Group**. If you check the private box, then your meeting title will not show up on the Touch Panel we suggest leaving this **UNCHECKED** so it will be listed on the Touch Panel.

4. Click **Submit** at the bottom of the page.

5. The **Reservation** page opens with the details of the reservation.

   **YOU ARE NOT FINISHED YET IF YOU DON’T CLICK ON “EDIT” IT WILL “AUTO DELETE”**

   **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 need to be adjusted.

### Reservation

**Reservation**

**Primary Information**

- **Reservation Title**: Test
- **Reference Number**: 19998/00001
- **Created By**: Basic User

**Reservation Description**

- **Date and Time**
  - **Starting**: Monday, September 14, 2020 9:00 AM
  - **Ending**: Monday, September 14, 2020 11:00 AM

**Additional Information**

- **Options**: Not allowed in this room.
  - **Custom Tabs**: - No Options -

1. On the left side under **Reservation; 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.
Click the **Options Tab**: This must be filled out first – they are in **RED print**.

1. **Account Code**: Select the drop-down menu **UMMS or UMMHC**. (Default is **UMMS**) If you work in the hospital you need to change it to **UMMHC**.

2. **Second Contact**: This can be the person making the reservation if the HOST is different. We just always need 2 people on every reservation. If we can’t reach the first contact, we have someone else to contact. This should be someone that knows about the event if we have questions.

3. **Contact Phone**: number for the second contact is required.

4. **Reservation Types**: select one that best describes the event.

5. **If you require A/V assistance or EBS Services, see page 26&27.** 6. **Scheduling Assistant** is not a working feature currently.
Then click **SAVE**. If you need to write a reservation description, add a host or add a repeat/recurring click **EDIT** again and add the rest of the **DETAILS** then click **SAVE**.

**Host**

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. 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 **HOST** information can be entered manually or selected from the **Resource Scheduler User List**. **If you type in names manually “Requested For” CANNOT make changes or see it under “My Reservations.”**
1. To select from the **Resource Scheduler User List**, click on **User List**. 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**. Note; if you have a recurring select this and all future events.
6. At this point you may make necessary edits you can change the date and time or swap resource or add Services (see Page 26).
7. Click Save when you are done.
8. To return to the **Home Page**, click **Home** on the top left of the page.
9. All reservations created will be listed by date under **My Reservations**.
Large Function Spaces;

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 description of the event and who will be attending. Once the information is filled out you will be notified if your reservation is approved. To add A/V or EBS Services see page 26&27.

Approvals

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 BY ROOM RESERVATIONS**)

6. If you make a change (add another room, change the time etc.) The reservation will go back for approval.

**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**

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, if it is a repeat/recurring use either delete event (to delete one) or delete series (to delete the rest of them from that point onward).

7. **The Reservation Description Box** is used for 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 and who will be attending. This box also needs to be filled out on any reservation that has more than one room attached to it. Add the reason for more than one room and the number of attendees in each of the rooms.

8. **Download** and **Publish** are not working features currently.

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**Copy Feature**

From the Reservation Details page, use the **MORE** drop-down in the right-hand corner.

The **Copy Reservation** page opens.

On the bottom left, check which items from the existing reservation are to be copied:

- Copy Attendees and Visitors

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1. From the **Reservation Details** page, use the **MORE** drop-down 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
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**.

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**Home Page Features**

![Resource Scheduler](image)

**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 my favorites or delete from my favorites. 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. Click on the room title and it will bring up a window with all the room details. This includes the capacity of the room, what options are available inside of each room and if catering is allowed. If you scroll to the bottom of the window you will see a picture of the room.

**Search Reservations and Display Resource Availability**

Search Reservations: (Under Quick Links dropdown)

1. **Scope:** Select a Location (you may pick more than one) keep it All Groups, All Resource Types and 0 people.
2. **Date:** You can look for future dates, dates in the past or select a specific date.
3. **Advanced:** you can search by reservation number, user contact or title. You can also search for deleted reservations by checking that box.
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.

**Resource Availability Search:** (Under Quick Links dropdown) Select a **Location** (you may pick more than one) keep it All Groups, All Resource Types, 0 people. Select the Date/Time you are looking for, click Submit. In the next window a room availability list will appear with what’s available. To View the room, click on the Room Title.

**Recurring Reservation**
1. Click **Reservation Wizard**: at the top of the page or under **Quick Links**.
2. **Scope**: Select **Location, UMMS, all Resource Types, and US Massachusetts**, leave the attendees **0** to see more availability. Add the **Start Date** and time. **Select 1 of 3** recurring options: **Daily, Weekly or Monthly**, add an **End Date** by using the calendar.
3. **If you select Daily**; you can either click on every 1 day or every 2 days or every weekday. Be very specific.
4. **For Weekly**; (example picture shows **every 1 week on Thursday**) Select how often and the day of the week.
5. **For Monthly**; If you select the first day of every one month you will be reserving Jan 1, Feb 1, March 1 etc. Be specific in the second section and select what you need example; The first Monday of every one month.

### Search Results

Check the appropriate room; add a **Meeting Title, # Of Attendees & Reserving Group** use the drop-down menu next to General (this is the reserving groups color). Choose one that **BEST** describes the event. **Click Submit**.
6. The **Reservation Confirmation** page will open with the details of the reservation. Click **Edit** to finish your reservation (refer to page 9 to fill out **OPTIONS** then continue on page 19).

YOU ARE NOT FINISHED YET IF YOU DON’T CLICK ON “EDIT” IT WILL “AUTO DELETE”
Feature for recurring reservations only

After the edits are made click **SAVE** and choose **Only This Event** or **This and Future Events**. When you select **“This and all Future Events”** it will save everything from that point forward.

To see the list of your repeat/recurring dates click the word **Repeat** (RED arrow) 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 check mark** indicates the date is scheduled and there have been no changes to the reservation.

2. When a change is made to the reservation on a single date, the **black check mark** is replaced by a **black flag** the new room is also listed next to the time.

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, using the SWAP RESOURCE feature. We **CANNOT** approve any reservations with conflicts.

4. If you don’t have any conflicts, then click **Save** and the **Reservation Confirmation** page will open.

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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 date of the conflict, in **RED PRINT** and the **Reservation Details** page for that date will open.
4. Click on **Swap Resource** (Located next to your conflicted room) on the **Reservation Details** page and the Resources page opens. Choose the building location from the drop-down menu and click **Show**. A list of available rooms will be displayed only for that date and time. Select a room by checking the box to the left of the room and click **Submit**. If services are available they will transfer over after you click submit.

5. Your reservation has been updated to the new room that you selected.

6. Click the X to close out the series or REPEAT if you have more conflicts to fix.

**An alternate way to Book a Recurring Event**

1. Using the **Reservation Wizard**; select your first room in the series. After filling out your **Options** page and saving it, click on the word **REPEAT** at the top of the reservation details page next to end time (refer to the red arrow on page 18).

2. Select one of the 3 options:
   - 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)
3. 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. Picture shows weekly on a Monday until 9/7/2020 Click submit.

4. If you have Conflicts they will need to be fixed (refer to page 19).

**Revising a Reservation**

1. To make changes to a reservation. On your HOME page click on the Reservation title of the event. This opens 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 SWAP RESOURCES (next to the room you already have). Resources page opens. Choose the location from the drop-down menu, click Show. A list of available rooms will be displayed. Select a room by checking off the box to the left of the room, click Submit.

3. If you need multiple rooms. Click ADD RESOURCES+ check the resources you need and submit. In the description box write the reason for multiple rooms and how many attendees in each room.
4. To remove a room in a **RECURRING SERIES**, click the X to the right of the room to be released. A room cannot be deleted this way if you only have one room. To delete one room, use the delete button under the **MORE** tab at the top right-hand corner of the details page.

5. When finished making all changes click **Save**.

6. Click **Save** and the changes are complete. To review any changes, go to the **Home Page** and find the reservation under **My Reservations**.

7. If you need to change the time or the number of attendees, you may also do this from this page then select **SAVE**.

8. This will go back to a **Pending** status until approved by Room Reservations.

**Planner**

The Planner View allows you to view quickly what is available on the date and time that you select. Search Options: Select a Location, ALL, and the date. There are two views select either **More Options** or **Less Options**. Scroll up or down. To **View** the rooms, click on the **Room Title**.
Ad Hoc – Adding a single date to a reservation

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 the word **REPEAT**, 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**. A new **Ad Hoc** page will open, continue adding your dates until you are finished.
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 Close.

4. Remember to fix all CONFLICTS (refer to page 19).

5. If you used the Reservation Wizard the Reservation Confirmation page will open. Click Finished and then return to the Home Page.

**Deleting a Reservation**

1. Reservation Details: to delete a single event reservation select MORE than Delete Event.

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 only need to delete **ONE** from a recurring, go to the date that you want to delete and then select “**DELETE EVENT**”.

5. If you would like to delete one room from your multiple room reservation click the **X** next to the room, you wish to delete.

**Quick Reserve Reservation**

Select the room that you want to book on the left-hand side of your home page.

1. Select date that you want.
2. On the calendar itself select the correct time making sure it’s available the times that you need it.
3. **By CLICKING** on the time that you need the reservation a Quick Reserve window will pop up.
4. Fill out the information and either click submit or if you need to see the details page select more. This will stay pending until reviewed and approved by room reservations.

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**Services from EBS and A/V**

1. **EBS Set up Services** are only allowed in the following rooms:
   a. Faculty Conference Room, Blais Pavilion, MPR East/West, Cube and New & Old Lobbies

2. **A/V services are only allowed in certain rooms where stated.**

   Click on **ADD SERVICES**; **MAKING SURE TO SELECT THE CORRECT ROOM SERVICE.** i.e. **DO NOT CLICK ON BLAIS SERVICE FOR THE FCR ROOM SET UP;**
Check the number of Tables and Chairs that you need then click next;
Please note you need at least a 1 week lead time for EBS Services and 2 weeks for A/V