Resource Scheduler User Training

Room Reservations
Room S2-243
(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.**
Logging in For the First Time:

1. Go to our website: http://www.umassmed.edu/roomreservations/index.aspx “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 Phone Number (required).

4. Enter your Business Unit and Account Code both are the same (either UMMS or UMMHC) and your Department.

5. 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.

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. Click Submit.

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

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: (refer to page 6)

Planner: (refer to page 23)

Under Quick Links (drop-down): One click access to all reservation information:

1. Reservation Wizard: The link used to enter all reservations. (refer to page 6)

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

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, keep it **UMMS, all Resource Types, US-Massachusetts**, and if you keep the people **0** it will show you more available rooms.

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. (for recurring see pages 17-21)

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

**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 have to be adjusted.
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**) If you work in the hospital you need to change it to **UMMHC**.
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.

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**.
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.”
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

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 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

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.
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. This should be a description of the event and the set details for EBS.
8. Download and Publish are not working features at this time.
Copy Feature

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**

**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 of the room details. This includes the capacity of the room, what is inside of each room, special room set up instructions, if catering is allowed and a room picture. If you scroll to the bottom of the window you will see a picture of the room. Click on the image of the room and the image will either enlarge or show a 360 view 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 in the past or select a specific date.
3. **Advanced:** you can search by reservation number, user contact 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.

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 rooms click on the **Room Title**.
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.

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.
Check the appropriate room; add a **Meeting Title**, # **Of Attendees & Color** (a pull down menu-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

- Top right hand corner SAVE tab. After 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 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. If you don’t have any conflicts then 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+** (blue box bottom left above conflicted room) 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. Now you still need to delete the room in **RED**. To remove it click the **X** in the box on the right of the room highlighted in red.

6. Click **Save** (or **REPEAT** if you have more conflicts) and select **Only This Event** or **This and All Future Events**.
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 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).
1. To make changes to a reservation, open to the **Reservation Details** page. To open click on the **Reservation title**. 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** (blue box 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**.

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**.

7. This will go back to a **Pending** status until approved by Room Reservations.
The Planner View allows you to view quickly what is available on the date and time that you select.

1. Search Options: Select a Location, ALL, 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.
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 any and all **CONFLICTS** (refer to page 20).

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:** 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 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 reservation click the **X** next to the room you wish to delete.