

# **Resource Scheduler User Training**

Room Reservations

Room S2-243

(508) 856-2264

Compiled by Cynthia Cote

Updated November 2017

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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

University of Massachusetts  
UMASS Medical School

Resource Scheduler

Hello Zirpola (Miller), Karen ▾ Help

HOME RESERVATION WIZARD PLANNER QUICK LINKS ▾

General Options Personal Address Book

Personal Information - User ID: 18

Name Zirpola (Miller), Karen

Email karen.zirpola@umassmed.edu

Mobile Password CHANGE

NTLM Login ZirpolaK

Phone 508-856-5033 (Ext.)

Business Unit UMMS/School

Account Code UMMS

Department School Services/Room Reservations

User Picture No Image Found

Options

Language (Calendar) English

Country (Holidays) United States

Refresh (0 for no refresh) 0 Minute(s)

Default Location UMass Medical School

Default Group Medical School Rooms

Default Calendar View Day

Time Format 12 Hour

User Settings

Allow Assignments

EMail Options

Edit Notification Emails

Receive Confirmation Emails

## 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

The screenshot shows the Resource Scheduler Home Page for the University of Massachusetts Medical School. The page is organized into several sections:

- Top Navigation:** Includes the UMass Medical School logo, the text "Resource Scheduler", a user greeting "Hello Zirpola (Miller), Karen", and a "Help" link. Below this is a secondary navigation bar with "HOME", "RESERVATION WIZARD", "PLANNER", and "QUICK LINKS".
- Left Sidebar:** A "Default Tree" dropdown menu is followed by a search box and a list of resources under "UMass Medical School". Resources include various buildings (ACCES, Albert Sherman, Benedict, Lazare) and a detailed list of "Medical School Rooms" such as Amphitheater I S2-102, AS2.2102 (AUD) Auditorium & Atrium area, and others.
- Main Content Area:**
  - My Reservations:** A list of reservations with details like "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 grid showing availability for selected rooms. The grid has columns for hours from 5 AM to 10 PM. Reservations are shown as colored bars: "FOM 2 Fall 2016" (red, 8 AM - 4 PM), "Test" (blue, 7 AM - 8 AM), "Intervention N NG 603 A Fall Sen 2016" (orange, 8 AM - 11 AM), "Mid Track 2 Brain Exam" (red, 8 AM - 11 AM), "Rape Aggression Defense course" (grey, 8 AM - 9 AM), and "N NG 613 Adv" (orange, 11 AM - 12 PM).
- Footer:** Contains links for "Room Reservations Approval Procedures" and "Room Reservations FAQs".

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

The screenshot shows the 'Reservation Wizard' page of the Resource Scheduler. The browser address bar displays 'qa-resourcescheduler.umassmed.edu/resourcescheduler/SearchWizard.asp'. The page header includes the University of Massachusetts Medical School logo and the text 'Resource Scheduler'. A navigation menu contains 'HOME', 'RESERVATION WIZARD' (highlighted), 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS'. A user greeting 'Hello Resource Scheduler' and a 'Help' link are visible in the top right. The main content area is titled 'Scope' and contains several dropdown menus: 'UMass Medical School', 'UMMS', 'All Resource Types', and 'US - Massachusett...'. Below these is a 'Filter' button. The 'Date/Time' section includes date and time pickers for '02/20/2017' and '03:00 PM', with a 'to' separator. Recurring options are 'None', 'Daily', 'Weekly', and 'Monthly', with 'None' selected. A checkbox for 'Only Available Resources' is checked. At the bottom, there are 'NEXT' and 'CLEAR' buttons, and 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 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.

# Search Results

The screenshot shows a reservation search interface. At the top, there are fields for 'Reservation Name', '# Of Attendees' (set to 0), and a 'Private' checkbox. Below this is a list of rooms with checkboxes and dropdown menus for setup requirements. To the right is a calendar grid for Monday, February 20, 2017, with columns for each hour from 12 PM to 11 PM. A red arrow points to the 1 PM slot in the 12 PM column, which is highlighted in white. Other rooms have various colored blocks (red, black, yellow) indicating reservations.

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.

# 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 the 'RESERVATION WIZARD' workflow. It is divided into three main sections: 'Primary Information', 'Reservation Description', and 'Additional Information'. The 'Primary Information' section lists the reservation title as 'Test', the reference number as '-1999802472', and the creator as 'Resource Scheduler'. The 'Reservation Description' section shows the reservation is for 'Monday, February 20, 2017' from 1:00 PM to 3:00 PM in 'US - Massachusetts (Eastern)'. The 'Additional Information' section indicates that 'No Catering' is allowed and there are 'No Options'. On the right side, the resource is identified as 'UMass Medical School - Medical School Rooms - Hiatt Auditorium S1-608'. At the bottom, there are four tabs: 'PIM', 'EDIT', 'FINISHED', and 'PRINT'. The 'FINISHED' tab is currently selected. A footer contains links for 'Room Reservations Approval Procedures' and '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.



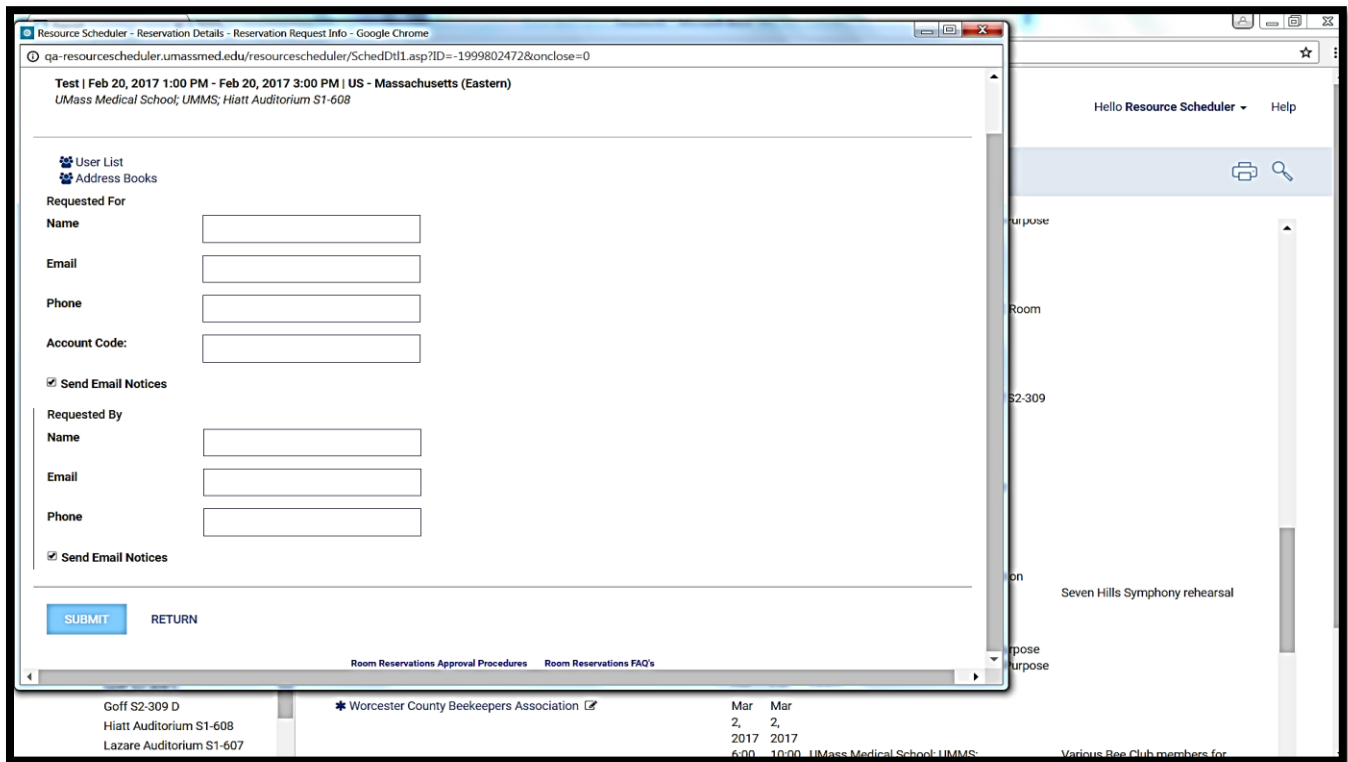
# Reservation Details Page

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**) 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.

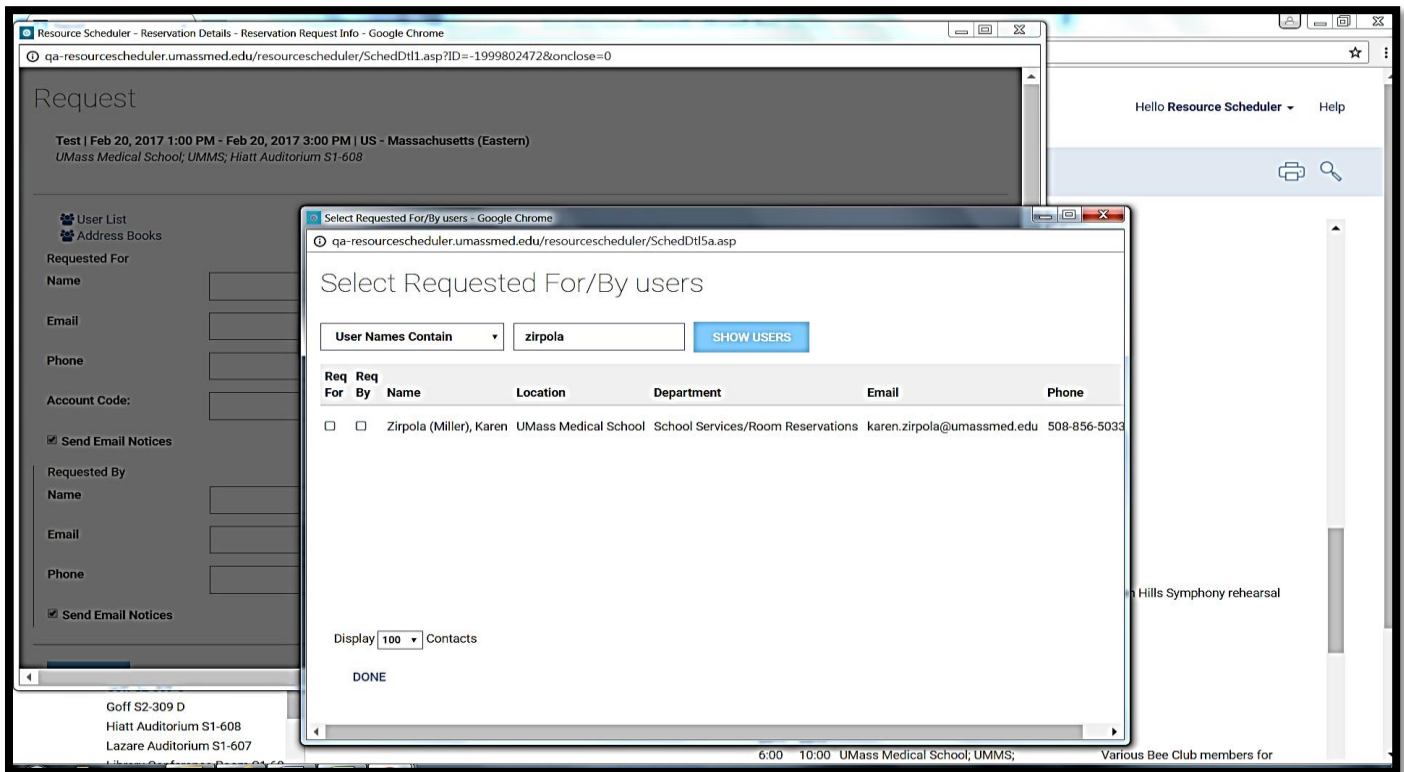
Then click **SAVE**. If you need to write a reservation description, add a host or add a repeat/recurring click **EDIT** again and add the rest of the **DETAILS** then click **SAVE**.

# On Behalf Of



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 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

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

### 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

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 search bar is located on the right. The main content area is titled 'My Favorites' and shows a calendar grid for December 1, 2016. The grid lists several rooms and their reservations: Amphitheater I S2-102, Faculty Conference Room S1-342 (SOM ORIENTATION), Goff Video Conference Room S2-307C (Producti...), Room S2-205 (Jr Faculty Development Program), Room S2-310 (Jr Faculty Development Program), and Post surgical support. Below the calendar is a 'My Reservations' section with details for 'Vendor Days FY16', 'Lunch time', 'SOM Classes', and 'SLAA Meeting'. The footer 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 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

The screenshot shows the 'Search Reservations' interface. At the top left is the University of Massachusetts Medical School logo. The page title is 'Resource Scheduler'. On the right, it says 'Hello Resource Scheduler' and 'Help'. A navigation bar contains 'HOME', 'RESERVATION WIZARD', 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS'. Below this is a search icon. The main heading is 'Search Reservations'. Under 'Scope', there are dropdowns for 'Locations (2)', 'All Groups', 'All Resource Types', and a text box for '0'. Under 'Date', there are radio buttons for 'Current and future dates', 'Dates in the past', and 'Specify'. There are 'Start Date' and 'End Date' fields, both set to '12/15/2016'. Under 'Advanced', there is a 'Text Search' field, checkboxes for 'Search Options Text', 'Search Custom Tabs', 'Search Deleted Reservations', and 'Include Conflict Reservations'. There are also fields for 'Reservation Number' (1999803695), 'User Contact' (with a selection icon), 'Contact Role' (Any), and 'Group By' (Reservation Date). At the bottom, there are 'SHOW...' and 'CLEAR' buttons. Links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's' are at the bottom right.

## 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.

The screenshot shows the 'Resource Availability Search' interface. At the top left is the University of Massachusetts Medical School logo. The page title is 'Resource Scheduler'. On the right, it says 'Hello Resource Scheduler' and 'Help'. A navigation bar contains 'HOME', 'RESERVATION WIZARD', 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS'. Below this is a search icon. The main heading is 'Resource Availability Search'. Under 'Scope', there are dropdowns for 'UMass Medical School', 'UMMS', 'All Resource Types', and a text box for '0' with a 'Filter' button. Under 'Date/Time', there are date and time pickers for '12/09/2016' from '07:00 AM' to '12/09/2016' at '05:00 PM'. There is a 'Show Availability in Timezone' dropdown set to 'US - Massachusetts (Eastern)'. Under 'Advanced', there is a 'Day Of Week' section with checkboxes for 'S M T W T F S' (all checked). There is a 'Resource Setup' dropdown with a 'SELECT' button. There is a 'Results' dropdown set to 'Only Available Resources'. At the bottom, there are 'SUBMIT' and 'CLEAR' buttons. Links for 'Room Reservations Approval Procedures' and 'Room Reservations FAQ's' are at the bottom right.

**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**.



# Recurring Reservation

The screenshot shows the 'Resource Scheduler' search wizard interface. At the top, there is a navigation bar with 'RESERVATION WIZARD' highlighted. Below this, the 'Scope' section includes dropdown menus for 'UMass Medical School', 'UMMS', 'All Resource Types', and 'US - Massachusett...', along with a 'Filter' button and a user count of '0'. The 'Date/Time' section features date and time pickers for start and end times, with '12/02/2016' and '02:00 PM' selected for the start, and '12/02/2016' and '03:00 PM' for the end. The 'Recurring' section has radio buttons for 'None', 'Daily', 'Weekly', and 'Monthly', with 'Monthly' selected. Below this, there are options to specify the recurrence pattern, such as '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, 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 **1<sup>st</sup>** day of every **1** month(s) OR
    - f. The **1<sup>st</sup>** **Sunday** of every **1** month (s)
5. Next **Search Results** page will be displayed.

# Search Results

The screenshot shows the 'Room Reservations' interface. On the left, a list of rooms is displayed with checkboxes and dropdown menus for 'No set up required' and 'Select'. The main area is a calendar grid for Monday, December 05, 2016, with time slots from 12 PM to 11 PM. A reservation for 'UMMS: Room S7-106' is shown in orange, spanning from 12 PM to 1 PM. Other rooms are shown in various shades of gray, indicating their availability. A legend at the bottom identifies room categories: Academic SOM (red), Academic GSN (orange), Academic GSBS (yellow), UMMS/Administration (green), Student (blue), UMMHC/Administration (dark blue), Chancellor/Dean (black), General (light gray), Grand Rounds (dark gray), and External (black). Buttons for 'SUBMIT' and 'RETURN' are visible at the bottom left.

- Check the appropriate room; add a **Meeting Title**, **# Of Attendees** & **Color** (a pull down menu-choose one that **BEST** describes the event. **Click Submit**).

The screenshot shows the 'Reservation Confirmation' page. The header includes the University of Massachusetts Medical School logo and the 'Resource Scheduler' title. The navigation menu includes 'HOME', 'RESERVATION WIZARD', 'PLANNER', 'APPROVALS', 'REPORTS', and 'QUICK LINKS'. The main content area displays the following information:

- Primary Information:**
  - Reservation Title: Training
  - Reference Number: -1999802452
  - Created By: Resource Scheduler
  - Resources: UMass Medical School - Medical School Rooms - Room S7-106
- 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: - No Options -

At the bottom, there are buttons for 'PIM', 'EDIT', 'FINISHED', and 'PRINT'.

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

Test ID: 1999802457 US - Massachusetts (Eastern) CANCEL SAVE MORE

01/06/2017 02:00 PM To 01/06/2017 03:00 PM  Repeat...

Recurring On The 1st Friday Of Every Month Until Saturday, May 20, 2017

Details Options History

Host: Cote, Cynthia / More...

Invite: Cote, Cynthia (1) Attendees

Description:

General # Of Attendees: 10 Private  Flag for Follow-up

Setup Time: 0 Cleanup Time: 0

ADD RESOURCES + REMOVE ALL

UMass Medical School - UMMS

Room S7-106 (20) - Pending

### Recurring

Test | Jan 6, 2017 2:00 PM - Jan 6, 2017 3:00 PM | US - Massachusetts (Eastern)  
UMass Medical School, UMMS; Room S7-106

Ad hoc Date  ADD Extend End Date  EXTEND

<input checked="" type="checkbox"/>	Friday, December 2, 2016	(0 Orders)
<input checked="" type="checkbox"/>	Friday, January 6, 2017	(0 Orders)
<input checked="" type="checkbox"/>	Friday, February 3, 2017	(0 Orders)
<input checked="" type="checkbox"/>	Friday, March 3, 2017	(0 Orders)
<input checked="" type="checkbox"/>	Friday, April 7, 2017	(0 Orders)
<input checked="" type="checkbox"/>	Friday, May 5, 2017	(0 Orders)

RETURN

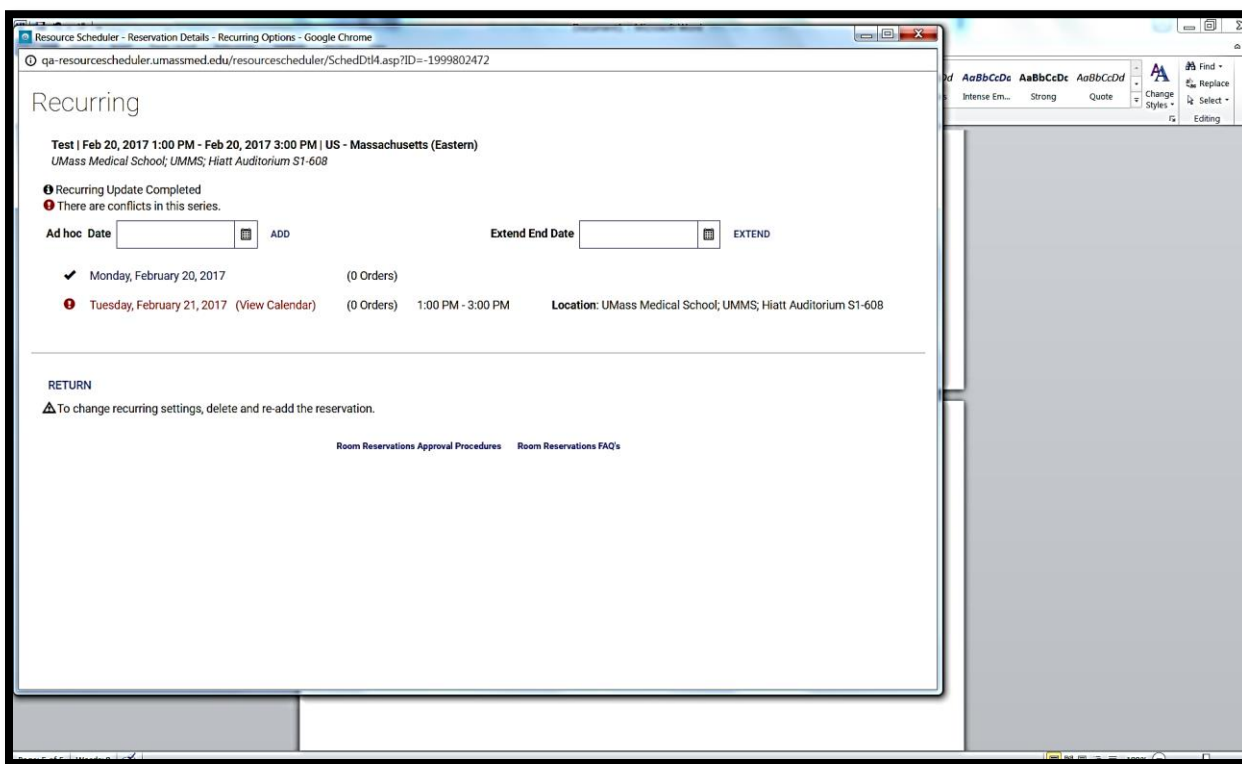
**⚠**To change recurring settings, delete and re-add the reservation.

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- 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

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

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

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).

## Revising a Reservation

The screenshot displays a reservation management interface for a reservation titled "Testing QA". At the top, the reservation ID is "1999802416" and the location is "US - Massachusetts (Eastern)". There are buttons for "CANCEL", "SAVE", and "MORE". The reservation is scheduled for "12/19/2016" from "09:00 AM" to "10:00 AM", with a "Repeat..." checkbox. Below this, there are tabs for "Details", "Options !", and "History". The "Details" tab is active, showing the "Host" as "Resource Scheduler" with a "More..." link. The "Invite" section shows "Resource Scheduler" as the inviter and "(1) Attendees". The "Description" field is empty. Below the description, there are settings for "General", "# Of Attendees" (set to 20), "Private" (checked), and "Flag for Follow-up" (unchecked). There are also "Setup Time" and "Cleanup Time" dropdowns, both set to 0. At the bottom, there are "ADD RESOURCES +" and "REMOVE ALL" buttons. A list of resources is shown, including "UMass Medical School - UMMS" and "Room S7-105 (25) - Approved" with a close button (X).

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.

# Planner

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

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  
 Tuesday  
 Thursday  
 Saturday  
 Monday  
 Wednesday  
 Friday

**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

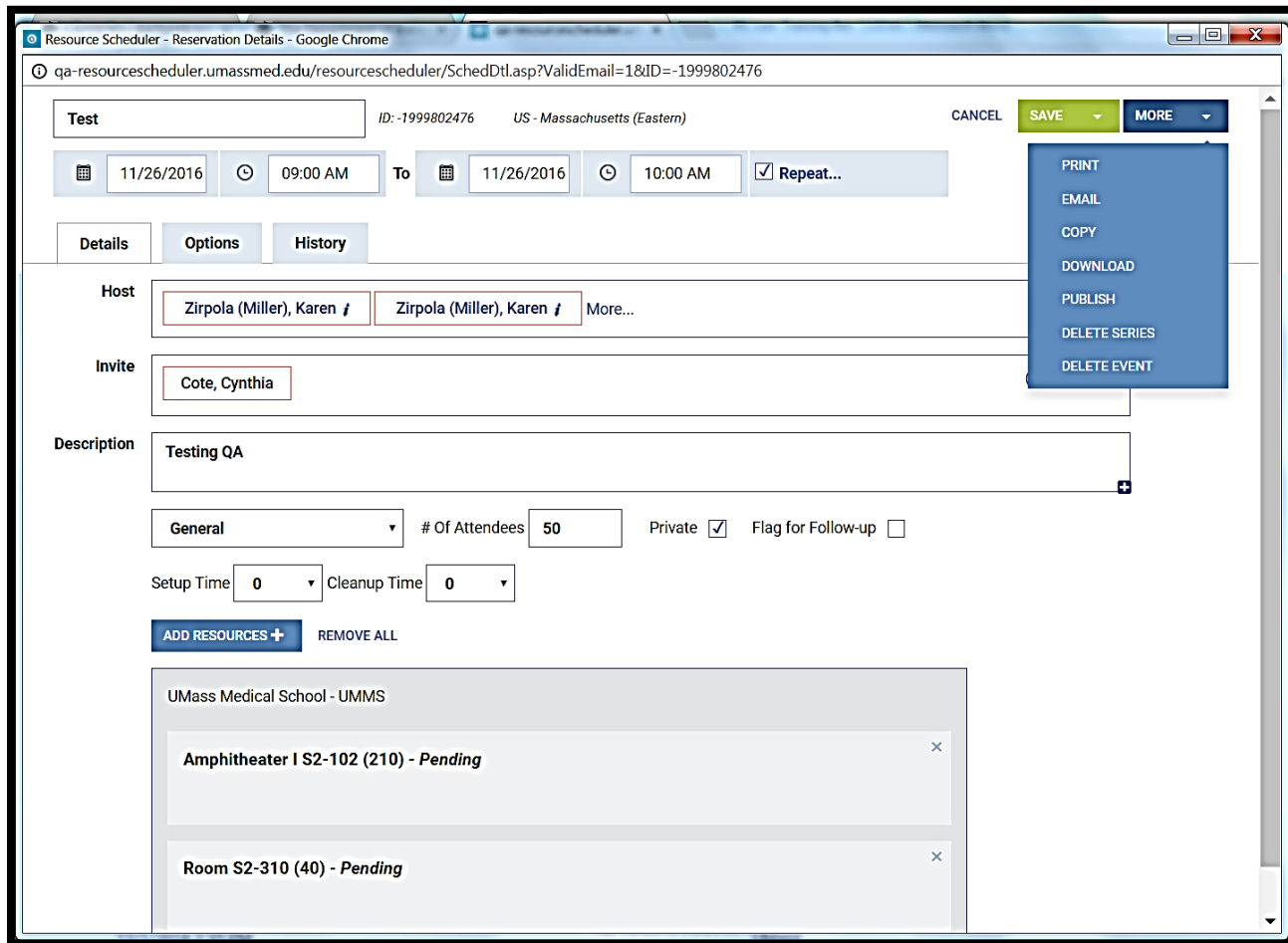
Treat recurring schedule as separate bookings

[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 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.

