

# **Resource Scheduler User Training**

Room Reservations

Room S2-243

(508) 856-2264

Compiled by Chris Vendetti

Updated October 2021

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# Personal Information

Personal Information - User ID: 7296

Name: Basic User  
Email: basic@test.com  
Password: ..  
Mobile Password: CHANGE  
Use Login Name instead of Email to Login:   
Login Name: basicu  
Phone: 508-456-2264 (Ext.)  
Business Unit: UMMS/School  
Speed Type/Cost Center: Type your Speed Type or Cost Center here  
Department: Room Reservations  
User Picture: No Image Found

Options

Country (Holidays): United States  
Refresh (0 for no refresh): 0 Minute(s)  
Default Location: UMMS Medical Rooms  
Default Group: Meeting/Class Rooms  
Default Calendar View: Week  
Time Format: 12 Hour

User Settings

Allow Assignments:

Email Options

Edit Notification Emails:   
Receive Confirmation Emails:   
Email Signature: [Text Area]

Home Page Layout

Top Panel: Show My Reservations  
Bottom Panel: Show My Favorites

SUBMIT RESET

## 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](mailto: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.**

- 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.
- 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

**Resource Scheduler Home Page** is divided into three sections:

- On the left side under UMass Medical School is the list of **Resources/Rooms**.
- My Reservations:** a listing of all reservations by date the user has created.
- 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:

- 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.

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

The screenshot shows the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The page is titled 'Reservation Wizard' and includes a navigation bar with 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. The main content area is divided into sections for 'Scope' and 'Date/Time'. Under 'Scope', there are dropdown menus for 'UMass Medical Rooms', 'All Groups', 'All Resource Types', and 'US - Massachusetts...'. A 'Filter' button is present. Under 'Date/Time', there are input fields for the date (09/14/2020) and time (09:00 AM to 11:00 AM). There are radio buttons for 'Recurring' (None, Daily, Weekly, Monthly) and a checked checkbox for 'Only Available Resources'. At the bottom, there are 'NEXT' and 'CLEAR' buttons. The Windows taskbar at the bottom shows the system tray with the date and time (9:15 AM, 6/20/2020).

### 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 screenshot shows the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The page title is 'Search Results'. The search criteria are: 'Test' (location), '10' (quantity), 'General' (category), and 'Private' (visibility). The results are displayed for 'Monday, September 14, 2020 (US - Massachusetts (Eastern))' from 8 AM to 11 PM. A list of rooms is shown on the left, with checkboxes for selection. The room 'Goff Second Floor Rooms: Goff S2-307 A/B (16)' is selected. A red arrow points to the 9 AM slot in the calendar grid for this room. A yellow bar is visible in the 3 PM to 7 PM slot for the same room. The system tray at the bottom shows the time as 9:17 AM on 6/30/2020.

Room	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM
First Floor Rooms: Room S1-123 (30)																
First Floor Rooms: Library Conference Room S1-605 (29)																
First Floor Rooms: Hiatt Auditorium S1-608 (95)																
<input checked="" type="checkbox"/> Goff Second Floor Rooms: Goff S2-307 A/B (16)																
<input type="checkbox"/> Goff Second Floor Rooms: Goff S2-307 C (14)																
<input type="checkbox"/> Goff Second Floor Rooms: Computer Lab S2-307D (16)																
<input type="checkbox"/> Goff Second Floor Rooms: Goff S2-307 E/F (16)																
<input type="checkbox"/> Goff Second Floor Rooms: Goff S2-309 A (21)																
<input type="checkbox"/> Goff Second Floor Rooms: Goff S2-309 D (20)																
<input type="checkbox"/> Meeting/Class Rooms: Room S2-205 (14)																

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.

The screenshot shows the 'Resource Scheduler' interface for the University of Massachusetts Medical School. The main view is a calendar for December 2021. On the left, a sidebar lists various rooms, with 'Amphitheater I S2-102' selected and highlighted. The calendar grid shows events for each day, including 'UMMS New Hire', 'N707 Biomedical', 'Orthopedic Grand', 'Anesthesia Resident', 'FOM2 OSD Core Small', 'Orthopedic CORE', 'Schwartz Rounds', 'Performance', 'Quest Training Session', 'Pharmacy Case', 'University Case manager', 'FOM1 DSF Exam- fall 2021', 'Acute Care Day', and 'GSBS - Foundations'. The room 'Amphitheater I S2-102' is highlighted in the calendar cells for several dates.

## Amphitheater I S2-102

<b>Description</b>	Amphitheater I S2-102
<b>Location</b>	UMass Medical Rooms:Amphitheater
<b>Resource Type</b>	Amphitheater
<b>Contact Info</b>	University Campus Room Reservations 508-856-2264
<b>Capacity</b>	35
<b>Reservations require approval</b>	Yes
<b>Additional Information</b>	For AV assistance contact the Help Desk x68643.
<b>Time Fence</b>	A Fixed Date 2023-7-31 (Apply Limit to non-Recurring Schedules) (Location Level)
.	No
<b>Options</b>	
<b>Audio Visual Conference</b>	yes
<b>Blue Ray</b>	no
<b>Cameras</b>	Yes
<b>Catering Allowed</b>	yes

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.

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

The screenshot shows the 'Reservation' page in a web browser. The page title is 'Reservation'. Below the title, there are three sections: 'Primary Information', 'Reservation Description', and 'Additional Information'. At the bottom of the page, there are four buttons: 'PIM', 'EDIT', 'FINISHED', and 'PRINT'. The 'FINISHED' button is highlighted in green.

Primary Information		Resources	
Reservation Title	Test	UMass Medical Rooms - Goff Second Floor Rooms - Goff S2-307 A/B	
Reference Number	-1999626008		
Created By	Basic User		

Reservation Description	
Date and Time	
Starting	Monday, September 14, 2020 9:00 AM US - Massachusetts (Eastern)
Ending	Monday, September 14, 2020 11:00 AM US - Massachusetts (Eastern)

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

- On the left side under **Reservation; Primary Information** the **Reservation Title**, **Reference Number** and **Created By** information is listed.
- 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

Resource Scheduler - Reservation Details - Google Chrome  
umassmed.resourcescheduler.net/Resourcescheduler/SchedDtl.asp?ID=-1999626008&New=1

Test ID: -1999626008 US - Massachusetts (Eastern) CANCEL SAVE MORE

09/14/2020 09:00 AM To 11:00 AM Repeat...

Details | **Scheduling Assistant** | **Options** | History

Host: Basic User *f* More... (Red arrow points to 'More...')

Invite: Basic User (1) Attendees

Description: [Empty text area]

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

Setup Time: 0 Cleanup Time: 0

ADD RESOURCES + REMOVE ALL

UMass Medical Rooms - Goff Second Floor Rooms ADD SERVICES

Goff S2-307 A/B (16) - Pending SWAP RESOURCE

Resource Scheduler - Reservation Details - Google Chrome  
umassmed.resourcescheduler.net/Resourcescheduler/SchedDtl.asp?ID=-1999626008

Test ID: -1999626008 US - Massachusetts (Eastern) CANCEL SAVE MORE

09/14/2020 09:00 AM To 11:00 AM Repeat...

Details | Scheduling Assistant | **Options** | History

**Account Code**: UMMS/School

**Second Contact**: Room Reservations

**Contact Phone**: 62264

**Reservation Types**: UMMS General

No Catering: allowed in this room.

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

Request

Test | Sep 14, 2020 9:00 AM - Sep 14, 2020 11:00 AM | US - Massachusetts (Eastern)  
UMass Medical Rooms; Goff Second Floor Rooms; Goff S2-307 A/B

User List Address Books

Requested For

Name

Email

Phone

Department:

Speed Type/Cost Center:

Send Email Notices

Requested By

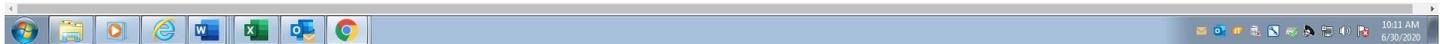
Name

Email

Phone

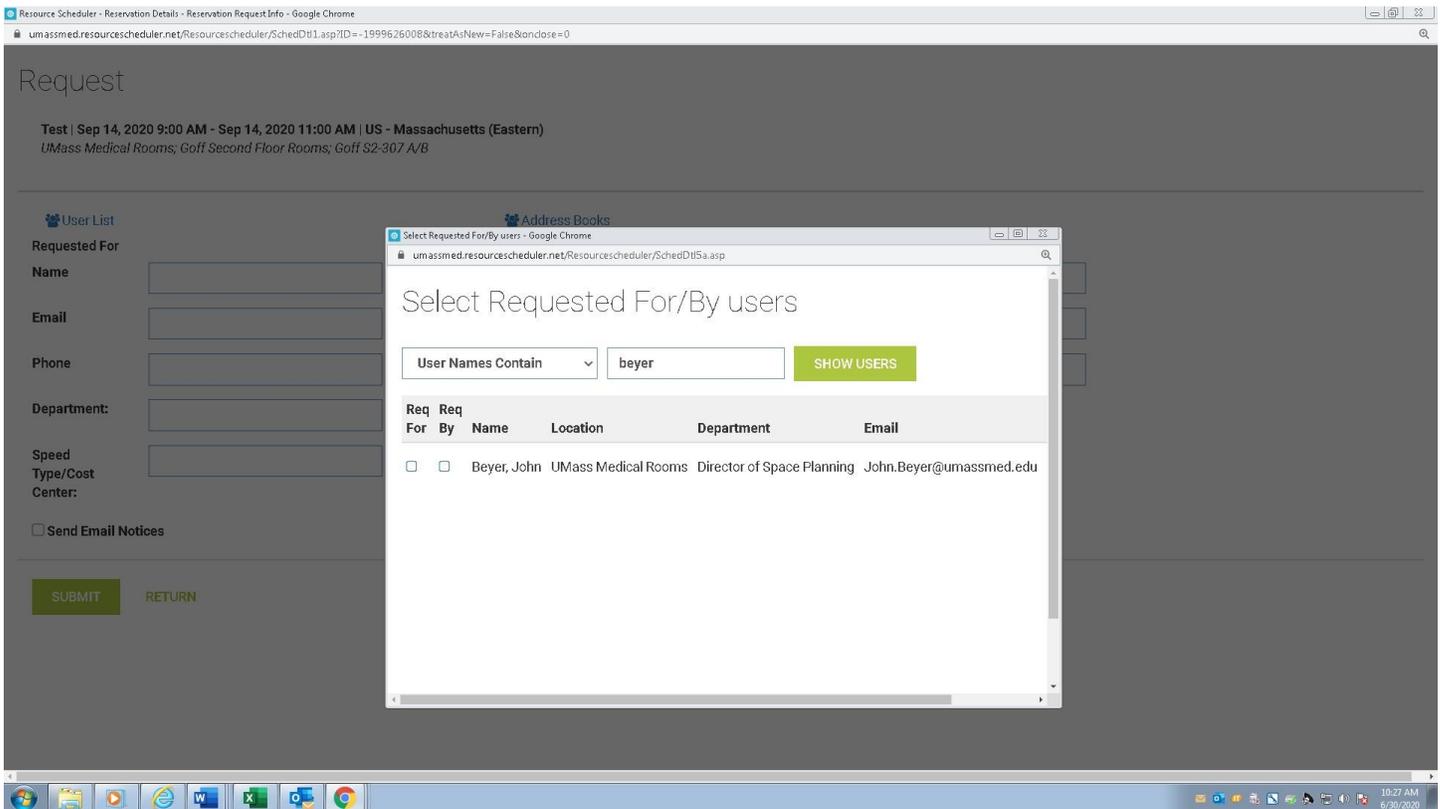
Send Email Notices

SUBMIT RETURN



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.”**

# Resource Scheduler User List



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

The screenshot displays the 'Resource Scheduler - Reservation Details' interface. At the top, it shows the reservation title 'Test', ID '-1999626008', and location 'US - Massachusetts (Eastern)'. The date and time are set for 09/14/2020 from 09:00 AM to 11:00 AM. The host is 'Beyer, John' and the invitee is 'Basic User'. The reservation is currently in a 'Pending' state for the resource 'Goff S2-307 A/B (16)'. The page includes tabs for 'Details', 'Scheduling Assistant', 'Options', and 'History'. There are buttons for 'ADD RESOURCES +', 'REMOVE ALL', 'ADD SERVICES', and 'SWAP RESOURCE'. The status bar at the bottom shows the time as 10:57 AM on 6/30/2020.

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.

- 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.
- In addition, an email is generated to notify the user. (**DO NOT REPLY TO THESE GENERATED EMAILS THEY ARE NOT READ BY ROOM RESERVATIONS**)
- 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

The screenshot displays the 'Reservation Details' page in a web browser. At the top, the reservation title is 'Test' with ID '-1999626008' and location 'US - Massachusetts (Eastern)'. The date and time are set for 09/14/2020 from 09:00 AM to 11:00 AM. The host is 'Beyer, John' and the invitee is 'Basic User'. The reservation is for 'Goff S2-307 A/B (16) - Pending'. A dropdown menu is open on the right side, showing options: PRINT, EMAIL, COPY, DOWNLOAD, PUBLISH, and DELETE. A red arrow points to the '(1) Attendees' link in the invitee box.

### Reservation Details Page:

- 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.
- 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**.
- Click **Submit** and return to the **Reservation Details Page**
- 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.

## Copy Feature

Resource Scheduler - Copy Reservation - Google Chrome  
umassmed.resourcescheduler.net/Resourcescheduler/schedcopy.asp?ID=-1999626008

### Copy Reservation

**Description**

Reservation Name: Test

Private:

Reservation Types: General

# Of Attendees: 10

Reservation Description:

Copy Attendees & Visitors  
 Copy Requested For/By  
 Copy Option Information

**Time**

Start\*: 09:00 AM

End\*: 11:00 AM

Setup Time: 0 Cleanup Time: 0

**Resources**

- ▼ UMass Medical Rooms - Goff Second Flo...
- Goff S2-307 A/B (16) - Pending (Approvals)

COPY CANCEL

11:07 AM 6/30/2020

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

- 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 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

The screenshot shows the 'Search Reservations' page in a web browser. The page has a header with the title 'Search Reservations'. Below the header, there are several sections for filtering search results:

- Scope:** Includes dropdown menus for 'UMass Medical Rooms', 'All Groups', and 'All Resource Types', along with a numeric input field set to '0'.
- Date:** Features radio buttons for 'Current and future dates' (selected), 'Dates in the past', and 'Specify'. It also has 'Start Date' and 'End Date' fields, both set to '06/30/2020'.
- Advanced:** Contains a 'Text Search' input field, a 'Reservation Number' input field, and several checkboxes: 'Search Options Text', 'Search Custom Tabs', 'Search Deleted Reservations', and 'Include Conflict Reservations'. It also includes 'User Contact' (set to 'Beyer, John'), 'Contact Role' (set to 'Any'), and 'Group By' (set to 'Reservation Date') dropdown menus.

At the bottom of the search section, there are 'SHOW...' and 'CLEAR' buttons. The browser's taskbar at the bottom shows the time as 11:32 AM on 6/30/2020.

### 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.

- 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.
- Show:** to view the reservations that you were searching for.

The screenshot shows the 'Resource Availability Search' page. At the top, there is a navigation bar with 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. The main heading is 'Resource Availability Search'. Below this, there is a 'Scope' section with dropdown menus for 'UMass Medical Rooms', 'All Groups', and 'All Resource Types', and a text input for '0' people. A 'Filter' button is to the right. The 'Date/Time' section has two date pickers set to '06/30/2020' 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, all of which are checked. There is a 'Resource Setup' dropdown set to 'SELECT' and a 'Results' dropdown set to 'Only Available Resources'. At the bottom, there are 'SUBMIT' and 'CLEAR' buttons.

**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

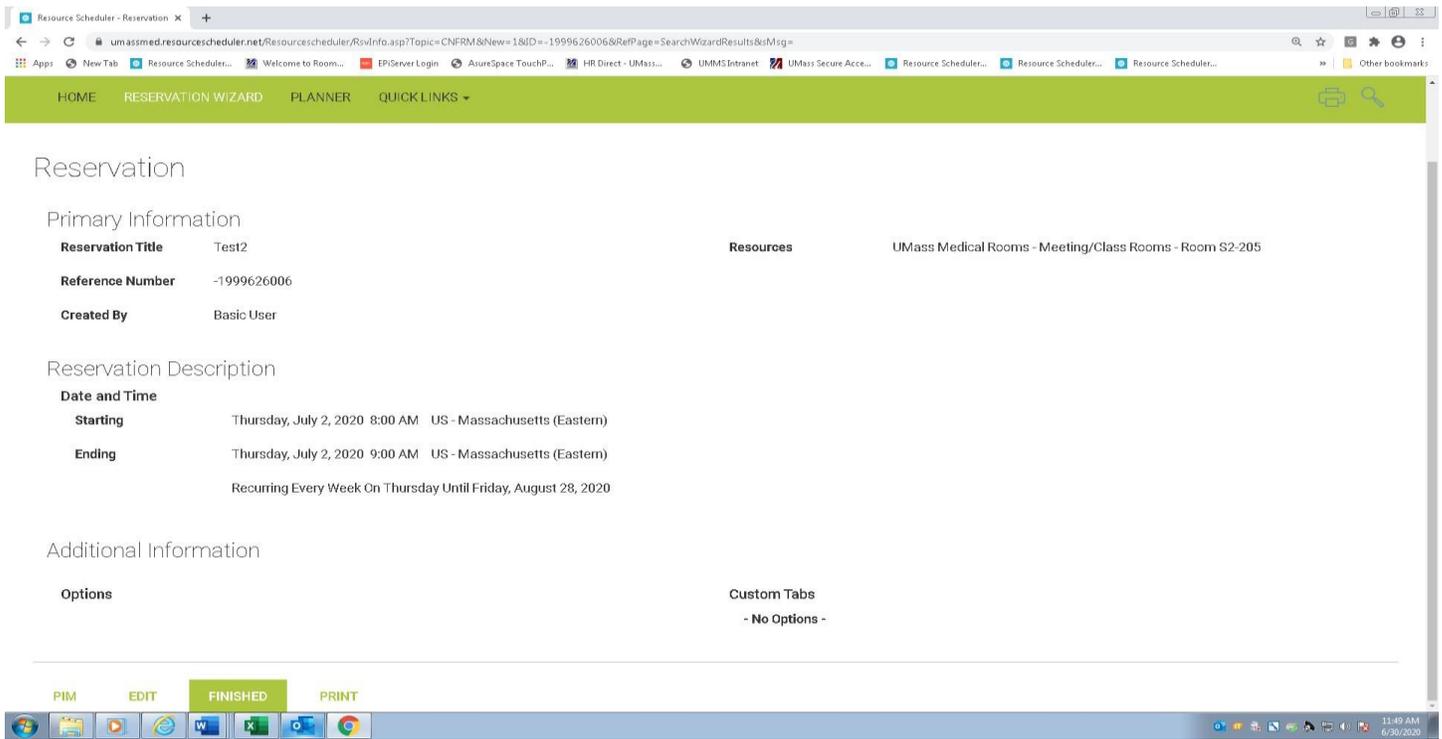
The screenshot shows the 'Recurring Reservation' page. At the top, there is a navigation bar with 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. The main heading is 'Resource Scheduler'. Below this, there is a 'Scope' section with dropdown menus for 'UMass Medical Rooms', 'All Groups', 'All Resource Types', and 'US - Massachusetts...', and a text input for '0' people. A 'Filter' button is to the right. The 'Date/Time' section has two date pickers set to '07/02/2020' and '08/00 AM' to '09:00 AM'. The 'Recurring' section has radio buttons for 'None', 'Daily', 'Weekly', and 'Monthly', with 'Weekly' selected. There is an 'Until' date picker set to '08/28/2020' and an 'Every' dropdown set to '1' Week(s). Below this, there are checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday', with 'Thursday' selected. At the bottom, there are 'NEXT' and 'CLEAR' buttons.

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

The screenshot displays the 'Search Results' interface for a reservation. At the top, there are input fields for 'Test2', '10' attendees, and a 'General' category. Below this is a list of room options with checkboxes and dropdown menus for setup requirements. The main part of the interface is a calendar grid for 'Thursday, July 02, 2020 (US - Massachusetts (Eastern))' with columns for 7 AM, 8 AM, 9 AM, 10 AM, 11 AM, 12 PM, 1 PM, 2 PM, 3 PM, and 4 PM. A blue box highlights the 8 AM slot. A legend at the bottom identifies room types by color: Academic SOM (red), Academic GSN (orange), Academic GSBS (yellow), UMMS/Administration (green), Student (blue), UMMHC/Administration (dark blue), Chancellor/Dean (purple), General (grey), Grand Rounds (light grey), and External (black). Buttons for 'SUBMIT' and 'RETURN' are visible at the bottom left.

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

Resource Scheduler - Reservation Details - Google Chrome  
um.assmed.resourcescheduler.net/Resourcescheduler/SchedDt4.asp?ID=-1999626006&New=1

Test2 ID: -1999626006 US - Massachusetts (Eastern) CANCEL SAVE MORE

07/02/2020 08:00 AM To 09:00 AM  Repeat...

Recurring Every Week On Thursday Until Friday, August 28, 2020

Details Scheduling Assistant Options History

Host Basic User / More...

Invite Basic User (1) Attendees

Description

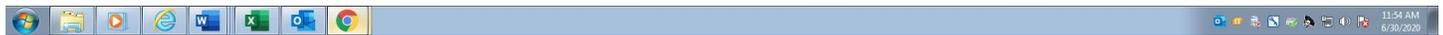
General # Of Attendees 10 Private Flag for Follow-up

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

UMass Medical Rooms - Meeting/Class Rooms ADD SERVICES

Room S2-205 (14) - Pending SWAP RESOURCE



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.

Resource Scheduler - Reservation Details - Recurring Options - Google Chrome  
um.assmed.resourcescheduler.net/Resourcescheduler/SchedDt4.asp?ID=-1999626006&recurType=W

## Recurring

Test2 | Jul 2, 2020 8:00 AM - Jul 2, 2020 9:00 AM | US - Massachusetts (Eastern)  
UMass Medical Rooms; Meeting/Class Rooms; Room S2-205

Ad hoc Date  ADD Extend End Date  EXTEND

- ✓ Thursday, July 2, 2020 (0 Orders)
- ✓ Thursday, July 9, 2020 (0 Orders)
- ✓ Thursday, July 16, 2020 (0 Orders)
- ✓ Thursday, July 23, 2020 (0 Orders)
- ✓ Thursday, July 30, 2020 (0 Orders)
- ✓ Thursday, August 6, 2020 (0 Orders)
- ✓ Thursday, August 13, 2020 (0 Orders)



## 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.
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.

The screenshot displays the 'Recurring' reservation page in the Resource Scheduler. The reservation is for 'Test 3' on 'Jul 20, 2020 9:00 AM - Jul 20, 2020 10:00 AM' in 'US - Massachusetts (Eastern)'. The location is 'UMass Medical Rooms; Meeting/Class Rooms; Room S2-205'. A message indicates 'Recurring Update Completed' and 'There are conflicts in this series.' Below this, there are fields for 'Ad hoc Date' and 'Extend End Date'. A table lists the dates and their status:

Date	Status	Orders	Time	Location
Monday, July 20, 2020	✓	(0 Orders)		
Tuesday, July 21, 2020	✗	(0 Orders)	9:00 AM - 10:00 AM	UMass Medical Rooms; Meeting/Class Rooms; Room S2-205
Wednesday, July 22, 2020	✗	(0 Orders)	9:00 AM - 10:00 AM	UMass Medical Rooms; Meeting/Class Rooms; Room S2-205
Thursday, July 23, 2020	✓	(0 Orders)		
Friday, July 24, 2020	✓	(0 Orders)		

Below the table, there is a 'RETURN' button and a warning: 'To change recurring settings, delete and re-add the reservation.' The left sidebar shows a navigation menu with 'UMass' and various buildings and rooms listed.

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

The screenshot displays the 'Recurring' event booking interface. At the top, it shows the event details: 'Test 4 | Aug 3, 2020 8:00 AM - Aug 3, 2020 10:00 AM | US - Massachusetts (Eastern)'. Below this, there are three main options for recurring events: 'Daily, until 08/03/2020', 'Weekly, until 09/07/2020', and 'Monthly, until 08/03/2020'. The 'Weekly' option is selected, and the 'Monday' checkbox is checked. There are also 'Ad hoc' options with a date field set to '08/03/2020'. At the bottom of the form, there are 'SUBMIT' and 'RETURN' buttons. The left sidebar shows a list of rooms, and the right sidebar shows a calendar view.

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 **1<sup>st</sup>** day of every **1** month(s) OR
    - f. The **1<sup>st</sup>** **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

The screenshot displays the 'Resource Scheduler' web application interface. The main content area shows the details for a reservation titled 'Test 4'. The reservation is scheduled for 08/03/2020 from 08:00 AM to 10:00 AM. The host is 'Basic User' and there is one attendee. The reservation is currently set to 'General' with 10 attendees. A modal window titled 'Resources' is open, showing a list of rooms: 'UMass Medical Rooms - First Floor Rooms' and 'Room S1-123 (30) - Pending'. The 'Room S1-123 (30) - Pending' room is selected, and the 'SWAP RESOURCE' button is visible. The left sidebar shows a navigation menu with 'HOME' and 'RESERVATIONS' options. The top navigation bar includes 'CANCEL', 'SAVE', and 'MORE' buttons.

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 screenshot displays the 'Planner View' interface for UMass Medical Rooms. At the top, there are search options including 'UMass Medical Rooms', 'All', and a date filter set to '09/21/2020'. A 'SEARCH' button is visible. Below the search bar, the interface shows a grid for 'Monday, September 21, 2020 (US - Massachusetts (Eastern) Time Zone)'. The grid columns represent hours from 12am to 11pm. The rows list various rooms, and the grid cells are color-coded to indicate room availability or reservations. A legend at the bottom identifies the colors used in the grid: Academic SOM (red), Academic GSN (orange), Academic GSBS (yellow), UMMS/Administration (green), Student (blue), UMMHC/Administration (dark blue), Chancellor/Dean (purple), General (grey), Grand Rounds (dark grey), and External (black).

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**.

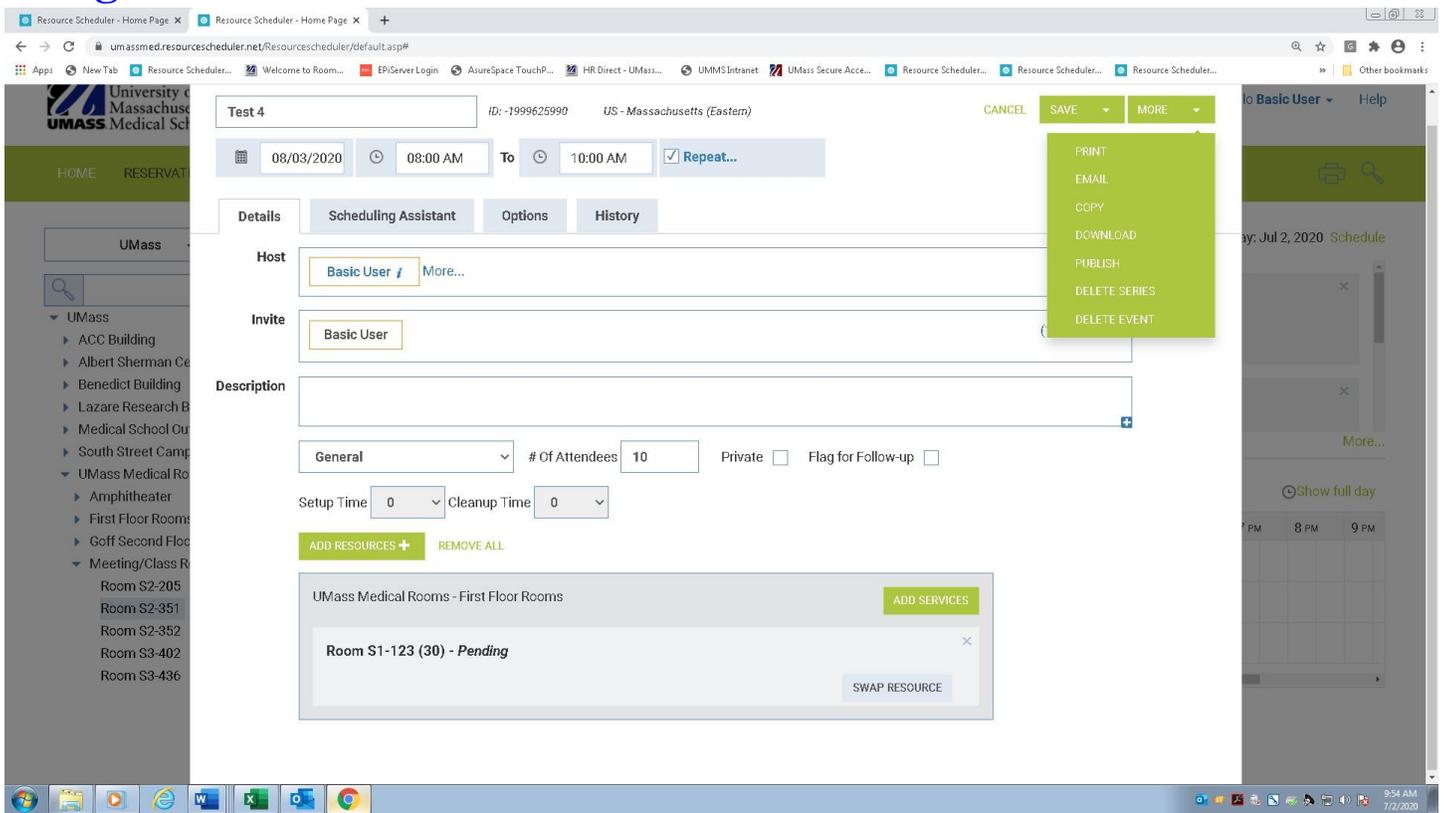
## Ad Hoc – Adding a single date to a reservation

The screenshot displays the 'Recurring' page in the UMass Resource Scheduler. The page title is 'Recurring' and the reservation details are 'Test 4 | Aug 3, 2020 8:00 AM - Aug 3, 2020 10:00 AM | US - Massachusetts (Eastern) | UMass Medical Rooms; First Floor Rooms; Room S1-123'. There are three main sections for recurring reservations: 'Daily, until 08/03/2020', 'Weekly, until 08/03/2020', and 'Monthly, until 08/03/2020'. The 'Ad hoc' option is selected, and the date field is set to '08/04/2020'. The 'Add' button is visible next to the date field. The 'SUBMIT' and 'RETURN' buttons are at the bottom of the form.

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

The screenshot shows the 'Quick Reserve' form in the Resource Scheduler application. The form is overlaid on a calendar view for Room S2-205 on Monday, July 6, 2020. The form fields are as follows:

- Reservation Title: Test
- # Of Attendees: 5
- Reservation Types: General
- Resource: Room S2-205 (14)
- Start Date/Time: Jul 6, 2020, 1 PM, 00
- End Time: 2 PM, 00
- Requested For: Beyer, John
- Additional Information:
  - Account Code: UMMS/School
  - Second Contact: Cynthia Cote
  - Contact Phone: 62264
  - Reservation Types: UMMS General

Buttons for 'SUBMIT' and 'MORE...' are located at the bottom of the form.

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.

## Services from EBS and A/V

The screenshot shows a web browser window with the URL `umassmed.resourcescheduler.net/Resourcescheduler/schedule.asp?Topic=RES&TopicId=60`. The page has several tabs: 'Details', 'Scheduling Assistant', 'Options', and 'History'. The 'Scheduling Assistant' tab is selected. The form includes the following fields and controls:

- Host:** A text box containing 'Beyer, John' and a 'More...' link.
- Invite:** A text box containing 'Basic User' and a '(1) Attendees' indicator.
- Description:** A large text area for entering details.
- General:** A dropdown menu currently set to 'General'.
- # Of Attendees:** A text box containing the number '10'.
- Private:** An unchecked checkbox.
- Flag for Follow-up:** An unchecked checkbox.
- Setup Time:** A dropdown menu set to '30'.
- Cleanup Time:** A dropdown menu set to '30'.
- Buttons:** 'ADD RESOURCES +' (green), 'REMOVE ALL' (green), and 'ADD SERVICES' (green).
- Room Selection:** A list of rooms under the heading 'Umass Medical Rooms - First Floor Rooms'. The selected room is 'Faculty Conference Room S1-342 (150) - Pending'. Below this, it shows 'Setup Time: 30' and 'Cleanup Time: 30', along with a 'SWAP RESOURCE' button.

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;**

Schedule for UMass Medical Rooms

resourcescheduler.umassmed.edu/resourcescheduler/schedule.asp?Topic=RES&TopicId=60

Location: UMass Medical Rooms

Service Type	Service Provider	Services	Available Times	Action
EBS	EBS	EBS Blais Services	6:00 AM - 6:00 PM	ADD SERVICE +
EBS	EBS	EBS Cube Services	6:00 AM - 6:00 PM	ADD SERVICE +
EBS	EBS	EBS FCR Services	6:00 AM - 6:00 PM	ADD SERVICE +
EBS	EBS	EBS Lobby Services	6:00 AM - 6:00 PM	ADD SERVICE +
EBS	EBS	EBS MPR Services	6:00 AM - 6:00 PM	ADD SERVICE +
EBS	EBS	EBS SERVICES	5:30 AM - 6:00 PM	ADD SERVICE +
ICELS	ICELS	ICELS Clinical Inventory	6:00 AM - 9:00 PM	ADD SERVICE +
UMMS A/V	A/V	A/V	6:00 AM - 6:00 PM	ADD SERVICE +

10:54 AM 6/29/2020

**Check the number of Tables and Chairs that you need then click next;**

Schedule for UMass Medical Rooms

resourcescheduler.umassmed.edu/resourcescheduler/schedule.asp?Topic=RES&TopicId=60

Select Service      Select Item      Confirm Order

CANCEL      NEXT

ROOM SET UP	Price	Quantity
FCR Banquet Rounds		5
FCR Chairs		50
FCR Rectangle Tables		0

11:04 AM 6/29/2020

Schedule for UMass Medical Room: x Schedule for UMass Medical Room: x +

resourcescheduler.umassmed.edu/resourcescheduler/schedule.asp?Topic=RESS&TopicId=60

Apps New Tab Resource Scheduler... Welcome to Room... EPI Server Login AsureSpace TouchP... HR Direct - UMass... UMMS Intranet UMMS Secure Acce... Resource Scheduler... Resource Scheduler... Resource Scheduler... Other bookmarks

**Contact** **Beyer, John**

**Email**

**Phone**

**Department**

**Account Code**

**Order Management**

**Status** New Order **Phase** **Not Submitted**

Qty	Description	Item Options	Item Notes	Price Each	Total
<b>EBS FCR Services</b>					<a href="#">EDIT</a>
5	FCR Banquet Rounds	- None -	- None -	\$0.00	\$0.00
50	FCR Chairs	- None -	- None -	\$0.00	\$0.00
<b>Order Subtotal</b>					\$0.00
<b>ORDER TOTAL</b>					\$0.00

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11:02 AM 6/29/2020

Please note you need at least a 1 week lead time for EBS Services and 2 weeks for A/V