Resource Scheduler for FY17 scheduling is (July 1, 2016 through June 30, 2017). Access to Resource Scheduler is available from the “Book a Room” tab on the Room Reservations home page

Note: ONLY the named Administrators/Coordinators on the timeline list are approved to enter the classes or events.

For approval, all reservations should include:

- A clear and complete Reservation Name/Meeting titles. **No acronyms.**

- A second contact (someone other than the person creating the reservation) is required.

- All the Required Fields (in red print) must be completed.

- Number of Attendees must be listed

- All conflicts must be resolved.

- Reservations for large function spaces (Faculty Conference Room, Blais Pavilion, ASC Multi-Purpose Room) must have the Reservation Description filled out with the details of the event.

Recurring meetings should be entered as a recurring reservation, not multiple single reservations. If assistance is needed to enter a recurring reservation, refer to the RS Training Manual, pages 19-24, on the Room Reservations home page or call 508-856-2264.

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POLICIES:

All Room Requests are made in Resource Scheduler Software

All UMass Campus Outside/External spaces must be scheduled through Resource Scheduler. These spaces are: 1) North Lawn, 2) South Lawn/Quadrangle, and 3) Basketball/Volley Ball Court.

Events attracting more than 25 external participants must notify Campus Parking (508-856-5934).

Users should:

- End the meeting or use of the room ten minutes before the hour or half-hour.
- Leave the room neat and orderly. Discard all trash and remove belongings.
- Contact EBS at x63825 a week prior to event date for room/lobby setup requirements.
- Contact LRB Catering at x62910 two weeks prior to event date for food/beverages.
- Contact Audio/Visual/Telecom at the Helpdesk 68643 prior to event date for equipment needs and/or training.
- Delete rooms immediately when a reserved room is no longer needed.

Failure to observe policies may result in the loss of Room Reservations privileges.

- Room Request for the fiscal year (July 1 to June 30) can be submitted for approval before March 1 of each year. Appeals for events for the next fiscal year prior to March1 (i.e. Board Exams, etc.) must be made directly to the Vice Provost for School Services.
- Only the Room Reservations staff is authorized to approve a room reservation from the Room Reservations Pool.
- Only printed confirmations will be honored in a conflict situation.
- Information regarding who has reserved a room will not be released by the Room Reservations staff.
- Only the Room Reservations staff is authorized to request a user to move. Any request by another party to a user to move or change a time should be reported immediately to the Room Reservations staff. Changes to your event may be made to accommodate upgrades and repairs to the room inventory.
- Only the Department Administrator or Vice Provost for School Services may reassign or withdraw the use of a room.
- NO TABLES are allowed in the hallways. (Local Fire/Safety Codes) The Albert Sherman Center lobby and open corridor in the ASC Cafe cannot be reserved based on fire/safety code regulations.
- FOOD AND BEVERAGE catering service is allowed only in the rooms where it is listed in the room information.
- POSTING on surfaces other than bulletin boards is prohibited. Notices on doors, doorframes, walls, or artwork in the Medical School Lobby will be removed.
- Swipe Cards for S2-307C (Video Conferencing Room), S2-307D (Computer Room), S2-205, S2-310 must be signed out from Room Reservations (S3-104) and returned/signed in immediately after event or meeting. Public Safety will unlock all other doors in the Room Reservations Pool at night and on the weekends. All locked rooms are swipe cards access rooms. You can use your UMMS or UMMHC ID Badge to swipe in.
- Holding more than one date for events (rooms, event, etc.) is not permitted.
- Fund raising events for individuals is not allowed.
- SMOKING IS PROHIBITED in the Medical School and on the UMass Memorial Campus.

Liability Statement: The Medical School cannot be held liable for any claim or right to damages or compensation on account of any loss, damage to personal property, or expense whatsoever. The Medical School is not responsible for equipment or personal belongings that remain after a meeting or event. The Medical School assumes no liability for injury to persons present in its buildings pursuant to an authorization issued to any organization.
**PROCEDURES:** Resource Scheduler Approval Process Information

**Required Fields for approval of "pending "requests**

All "Reservation Wizard" requests are real-time and will hold the resources selected pending approval. (There is no need for a first or second choice)

**Recurring meetings should be entered as a recurring reservation, not multiple single reservations.** If assistance is needed to enter a recurring reservation, refer to the RS Training Manual, pages 19-24, on the Room Reservations home page.

**On requests for the Faculty Conference Room, Multi Purpose Rooms or Lobbies:** the Reservation description must be filled out with setup requirements. Function space that requires a full setup has 30 minutes setup time built in the system. EBS room setup fee applies after 2:30pm and weekends.

**NO TABLES** are allowed in the hallways. (Local Fire/Safety Codes) The Albert Sherman Center lobby and open corridor in the cafe cannot be reserved based on fire/safety code regulations.

**NOTE:** The required fields (under Options) must be filled out first and saved— they are in **RED** print.

1. **Account Code** – pull down menu, select UMMS or UMMHC.

2. **Catering** – pull down menu – select yes or no.

3. **Second Contact** – contact has to be someone other than yourself, who can be contacted if there are any questions concerning the event.

4. **Second Contact Phone** – phone number, including area code, is required (i.e.: 508-856-2264)

5. **Reservation Type:** pull down menu, select the most appropriate.

6. **"On Behalf of"**– must be filled out it can be yourself, the second contact or the person the meeting is being requested for with a phone number and/or email listed

(*A Faculty Advisor and phone number is required by all students as the “Second Contact” on all space requests*)

**Room Requests for the new fiscal year (July 1st to June 30th) can be submitted for approval beginning March 1st of each year.** Any request for the next fiscal year received before March 1st will be denied.

Approvals will be processed within two business days if all required information complete. If there is no response within two business days to a request to complete the missing information or answer questions concerning the pending request will be denied/canceled.

In self-service, users can see what rooms are available and place a “hold” on a room pending APPROVAL by Room Reservations. APPROVAL will depend on appropriate use of the room, etc. Requests are processed in the order in which they are received and require approval.

Contact the UMass Helpdesk for all telecommunications and audio visual requests at 508-856-8643

Room Reservations reserves the right to make special arrangements to reassign or withdraw the use of a room when in the best interest of the institution.
Room Reservation FAQs

Q: Can I reserve the Albert Sherman Center lobby area or the open corridor area inside the ASC Cafe?
A: No, the ASC lobby and open corridor cannot be reserved based on fire code regulations.

Q: Will Room Reservations confirm receipt of pending requests?
A: A pending email is sent electronically when a reservation is submitted in Resource Scheduler Home page.

Q: Can Room Reservations give out contact information for a room that is already booked?
A: No. Room Reservations does not disclose information about clients to avoid pressure being put by one group on another to release a room.

Q: What if another meeting is in the room?
A: Bring approval confirmation to all meetings. If an unauthorized group is using the room, the confirmation will prove a reservation. Meetings are also posted on a weekly basis outside of each room. If a group refuses to leave, call Room Reservations handle the conflict. Please be aware that with the current Room Reservations software it is IMPOSSIBLE to double-book.

Q: What if the room is locked?
A: The only rooms routinely locked are the computer and videoconference rooms. Those keys may be signed out in S3-104. For all other rooms, call Campus Security at x63296 to unlock them.

Q: How far in advance can space be scheduled?
A: Room Reservations books on the school fiscal year: July 1st -June 30th. Any date within that time frame may be requested. Requests for the NEXT fiscal year are accepted beginning every March 1st. See Policies and Procedures for more information.

Q: How to make an appeal/complaint?
A: Contact the Room Reservations Coordinator by email to roomreservations@umassmed.edu. The appeal/complaint will be referred to the appropriate person.

Q: Are refreshments allowed in the rooms?
A: All rooms allow for refreshment, full catering services are allowed only in rooms marked “Catering Allowed”.

Q: What if the scheduled room is not clean?
A: All groups are responsible for cleaning up after themselves (unless otherwise arranged with EBS). If a room is not clean upon arrival contact EBS and notify Room Reservations for follow up.

Q: Is the use of unoccupied rooms without a approved reservation allowed?
A: No. Use Resource Scheduler Quick Reserve feature to schedule a last minute space. Unauthorized groups will be required to vacate.
External Users

Definition: individual(s) who represent(s) an organization not officially sponsored by the University of Massachusetts Medical School Worcester Campus or UMass Memorial Health Care (UMMHC).

External users must fill out the electronic request for space form above. The application is submitted electronically to the UMMS Communications Office.

The Communications Office will review all requests and determine whether or not the request is an appropriate use of Medical School facilities.

- If approved, Communications Office will email the form to the Room Reservations. Room Reservations will then schedule the meeting based on space availability and information provided on the request.

- Usage Fee: External users, including those sponsored by a Medical School or UMass Memorial department, may be charged a usage fee for events generating revenue.

- If the request is from a government agency, Communications Office will email the request form to the Vice Chancellor for Community and Government Relations. Requests will be reviewed and forwarded to Room Reservations for processing based on space availability.

- If a request is not approved, the University Communications Office will indicate the reason on the application form and return it.

- EBS set up/break down and A/V charges may apply for events occurring outside of regular business hours. Please contact EBS and/or A/V as soon as a room confirmation is received.

EBS (508) 856-3825 for setup support (If needed)

Sodexo Catering (508) 856-2910 (If needed)

Help Desk (508) 856-8643 for AV support (If needed)
Resource Scheduler
User Training
Office of School Services and Room Reservations
Room S3-104
(508) 856-2264
Reservation Wizard: Step-by-Step for a recurring event reservation

From the Resource Scheduler Home Page:

1. Click Reservation Wizard - at the top of the page or under Quick Links. (The information entered here will define the search of available rooms for the event.)

2. To find all available rooms for an event, skip down to Start Date. Click the calendar icon to the right of Start Date and select the date by clicking on it.

3. Enter the first date of the reservation by clicking on the calendar icon to the right of Start Date. Choose the date by clicking on it. The End Date should be the same as the start date.

4. Select a Start Time and End Time for the event (from the pull down menu).

5. The End Date will fill in automatically with the same date as the Start Date.

6. Skip down to Recurring and select the type of recurring event.
Choosing the type of recurring event

1. Under **RECURRING**, the default is **None**.

2. Select 1 of 3 recurring options: **Daily**, **Weekly** or **Monthly**.

3. For **Daily** select:
   a. Every **1** Day(s) OR
   b. Every Weekday

4. For **Weekly** select:
   a. Every **1** Week(s)
   b. Check off the day(s) of the week

5. For **Monthly** select:
   a. The **1st** day of every **1** month(s)
   b. The **1st** **Sunday** of every **1** month(s)

4. Then select the date the event is recurring **Until** by clicking on the calendar icon to the right. If the last date of the recurring reservation is June 25th, choose June 26th as an end date so that June 25th will be included in the reservation.

5. Click **Next** and the **Search Results** page will be displayed.
1. A list of available rooms for the dates and time selected will open. A room will only show if it’s available for all dates on a recurring reservation. If there are no rooms available for all dates, see * below.

2. By hovering the mouse over the “i”, a full description of each room will open (by clicking on it, it will remain open to scroll up and down).

3. Select a room or rooms by clicking on the box to the left of the each.

4. At the top of the page, fill out the Reservation Name, #Of Attendees, and Color (a pull down menu).

5. Click Submit at the bottom of the page.

6. The Reservation Confirmation page will open with the details of the reservation.

7. Click Edit to open the Reservation Details page.

*If there are no rooms available for all dates requested, enter the reservation as a single reservation (pg.5). From the Reservation Details Page, click (Options) after Repeat under Date and Time. The Recurring page opens. Make the event recurring from here by selecting Daily, Weekly, or Monthly and then selecting the Until date. This will create a recurring reservation with all the dates, and put the dates the room is not available, in Conflict (see page 25on how to resolve conflicts). A new room will have to be selected for the dates in Conflict.
Feature for recurring reservations only

1. Fill out the required fields under **Options** first (they are in red print).

2. Before clicking **On Behalf of** – notice the new features at the bottom of the page below **Reservation History**. One of these two options must be selected anytime a change is made to the reservation.

3. Choose **Only This Reservation** to make a change to the date displayed on the reservation details page only.

4. Choose **This and All Future Instances** to make a change to all dates on the recurring reservation, from the date displayed, forward.
1. On the bottom left of the Reservation Details page, click On Behalf of to display the Edit button.

2. Click Edit.

3. A screen will open asking to Save the Changes (the required information entered first), click OK.

4. Requested For is required. It 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. Requested By is not required (see notes below).

5. The On Behalf of information can be entered manually, selected from the Resource Scheduler User List or the Personal Address Book.

Note: A ‘Requested For’ contact (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 to the reservation. The user who created the reservation will also see it under My Reservations.

A ‘Requested By’ user does not see the reservation under My Reservations and does not have permission to make changes.
Details of a recurring event

1. Under Time, below Repeat (Options) the details of the recurring event are described.

2. To see a list of dates on a recurring reservation, click (Options) after Repeat, the Recurring Options page will open.

3. The list of dates on the recurring reservation is displayed. Next to each date is a green check mark. The green checkmark indicates the date is scheduled and there have been no changes to the reservation on that date.

4. When a change is made to the reservation on a single date, the green check mark is replaced by a green star.

5. 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.

6. If the room being requested is the FCR, the ASC MPR or one of the Lobbies, fill out the Reservation Description with a description of the event prior to approval.

7. Click Save and Done, the Reservation Confirmation page will open.

8. Click Finished and then click Home to return to the Home Page.
1. On the Recurring Options page on the top right hand corner there will be a red exclamation mark and the words “There are conflicts in this series”.

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 Resources on the top right of the Reservation Details page to the right of Resources and Services and a Resources page opens. Choose the location (for the room search) from the pull down menu, and click Show. A list of available rooms will be displayed. Select a room by checking the box to the left of the room, and click Submit.

5. The Reservation Details page for that date will open. Under Resources on the right, the room that has a conflict will be in red. Click on (Delete) to the right of the room highlighted in red.

6. Go to the bottom of the page and click on Only This Reservation or This and All Future Instances.

7. Click Save and Done to return to the Reservation Confirmation page.

8. Click Finished.

All Conflicts must be resolved or the reservation won’t be approved.
Revising a Single Event Reservation

1. To make changes to a reservation, open to the Reservation Details page. Changes can be made to the following: time, date, contact information, event name, room selection, # of attendees, etc.

2. To change a room, click Resources to the right of Resources and Services and a 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 (Delete) 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 and Done to return to the Reservation Confirmation page.

5. Click Finished and the changes are complete. To review any changes, go to the Home Page and find the reservation under My Reservations.
1. To make changes to a reservation, open the Reservation Details page. Changes can be made to the following: time, date, contact information, event name, room selection, # of attendees, etc.

2. When (Options) is clicked, a “Do you wish to save the changes you made on this page?” screen will appear. On a recurring reservation, determine whether the changes are to be made to This and All Future Instances on a reservation, or Only This Reservation and select the appropriate box at the bottom of the page before answering OK to save.

3. To make a change for all dates on a recurring reservation, the change must be made on the first day of the reservation, and then This and All Future Instances must be selected. If a change is made on a date, other than the first date, and This and All Future Instances is selected, the change will only be made to future dates, not dates prior to the date of the change.

4. To make a change for one day only on a recurring reservation, select Only This Reservation, at the bottom of the Reservation Details page.

5. To change a room, click Resources to the right of Resources and Services and a 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.

6. To remove a room, click (Delete) to the right of the room to be released. A room cannot be deleted until a new room is selected.

7. When finished making all changes click Save and Done to return to the Reservation Confirmation page.

8. Click Finished and the changes are complete. To review any changes, go to the Home Page and find the reservation under My Reservations.
1. **Ad Hoc** allows the user to add a single date to a reservation, single event or recurring.

2. From the **Reservation Details** page, click on **Options**, the recurring page will open. Select **Ad Hoc**, by clicking on the circle to the left of it. Select the date to be added by clicking on the calendar icon to the right of **Date**, below the words **Ad Hoc**. Select the date, and click **Add**. The recurring details page will open. (**Ad Hoc** is the only way to add a single date to a recurring reservation).

3. The **Ad Hoc** date selected will be displayed in the list of recurring dates on the reservation with the same room and time as the first date on the reservation. Click **Return** and then click **Save and Done**.

4. An **Ad Hoc** date is added to a single event reservation the same way. A single event reservation can also be changed to a recurring event. Click on **Options**, the recurring page will open. Choose the type of recurring event; daily, weekly or monthly. Choose the frequency of the recurrence and the when the reservation is recurring until, by choosing a date from the calendar icon. Click **Submit** at the bottom of the page and the **Reservation Details** page will open. If there are no changes, click **Save and Done**.

5. The **Reservation Confirmation** page will open. Click **Finished** and then **Home** to return to the **Home Page**.
Deleting a reservation

1. To delete a single event reservation, click **Delete** in the bottom left hand corner of the **Reservation Details** page.

2. A “Continue with delete of this schedule?” screen will open. Click **OK**, the reservation is deleted.

3. On recurring event reservations, before clicking delete, select **Only this reservation** or **This and all future instances**. If **Only this reservation** is selected, it will only delete the date open to the **Reservation Details** page. If **This and all future instances** are selected, the date open and all future dates on the reservation will be deleted.
The copy feature

1. From the Reservation Details page, **Copy** is on the bottom left of the page, click it.

2. The **Copy Reservation** page opens.

3. On the bottom left, check which items from the existing reservation are to be copied:
   a. Copy Attendees and Visitors
   b. Copy Requested For/By
   c. 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 right of the page.

7. The **Reservation Details** page for the copied reservation will open.

8. Click **Save and Done** and the copied reservation is complete.

9. The copied reservation can be found under **My Reservations** on the **Home Page**.
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. Also, on the bottom right left corner of the page, the notation (This reservation is pending approval).

5. 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.

6. In addition, an email is generated to notify the user.

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.