

Resource Scheduler User Training

Room Reservations

Room S2-243

(508) 856-2264

Compiled by Cynthia Cote

Updated July 2020

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Personal Information

Personal Information - User ID: 7296

Name: Basio User

Email: basio@umassmed.edu

Password: **

Mobile Password: CHANGE

Use Login Name instead of Email to Login: ☒

Login Name: basio

Phone: 508-556-2264 (Ext.)

Business Unit: UMMMS/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: [Signature Box]

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
3. Enter your **Phone Number (required)**, **Business Unit (either UMMS or UMMHC)** **Department**, and **Speed Type/Cost Center must be added to use Services.**
4. Nothing should be changed on the right-hand side except: **Home Page Layout** (bottom right) – use this to change the layout of your home page (top panel or bottom panel). You can change the layout of your home page based on how you want it to look.
5. The **Resource Scheduler Home Page** is personalized to each user and becomes a personal desktop listing of all the users' reservations (**Listed under My Reservations**). Click **Submit**.

Resource Scheduler Home Page

The screenshot shows the Resource Scheduler Home Page. The browser address bar displays `umassmed.resourcescheduler.net/Resourcescheduler/default.asp`. The page header includes the University of Massachusetts Medical School logo, the title "Resource Scheduler", and a user greeting "Hello Basic User". A green navigation bar contains links for HOME, RESERVATION WIZARD, PLANNER, and QUICK LINKS. The left sidebar lists UMass buildings and rooms, with "Meeting/Class Rooms" expanded to show Room S2-205, Room S2-351, Room S2-352, Room S3-402, and Room S3-436. The main content area features "My Reservations" with four reservation cards: "Icels test" (Jul 1, 2020 9:00 AM - 10:00 AM), "Tammi Testing" (Jul 3, 2020 7:00 AM - 8:00 AM), "Test2" (Aug 1, 2020 7:15 AM - 8:15 AM), and "Test3" (Aug 1, 2020 8:30 AM - 9:30 AM). Below is "My Favorites" with a calendar grid for "Goff S2-307 A/B". The bottom of the page shows a Windows taskbar with various application icons and a system clock indicating 9:00 AM on 6/30/2020.

Resource Scheduler Home Page is divided into three sections:

1. On the left side under UMass Medical School is the list of **Resources/Rooms**.
2. **My Reservations:** a listing of all reservations by date the user has created.
3. **My Favorites:** Daily availability for the rooms that the user selects as favorites.

Reservation Wizard: (refer to page 5-10)

Planner: (refer to page 22)

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

1. **Reservation Wizard:** This link is used to search for all available space. (refer to page 5-10)
2. **Search Reservations:** This link is for searching reservations that are either booked in the future or in the past. (refer to page 15).
3. **Display Resource Availability:** This link is to check availability for a specific date (refer to page 15).
4. **Reservation Quick List:** This link allows you to search reservations for a specific date and time. This feature will show all the reservations that are booked during that period.

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 browser address bar shows the URL 'umassmed.resourcescheduler.net/Resourcescheduler/SearchWizard.asp'. The page has a green header with navigation links: HOME, RESERVATION WIZARD, PLANNER, and QUICK LINKS. Below the header, the 'Scope' section includes dropdown menus for 'UMass Medical Rooms', 'All Groups', 'All Resource Types', and 'US - Massachusetts...', along with a text input for '0' and a 'Filter' button. The 'Date/Time' section features a date picker set to '09/14/2020', a time range from '09:00 AM' to '11:00 AM', and radio buttons for 'Recurring' (None, Daily, Weekly, Monthly). A checkbox for 'Only Available Resources' is checked. At the bottom of the form are 'NEXT' and 'CLEAR' buttons. The Windows taskbar at the bottom shows the time as 9:15 AM on 6/30/2020.

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 displays the 'Resource Scheduler' interface for the University of Massachusetts Medical School. At the top, there's a navigation bar with 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICKLINKS'. Below this, the 'Search Results' section is active. It features a search bar with 'Test' entered, a dropdown for 'General', and a 'Private' checkbox. A list of rooms is shown on the left, including 'First Floor Rooms: Room S1-123 (30)', 'First Floor Rooms: Library Conference Room S1-605 (29)', 'First Floor Rooms: Hiatt Auditorium S1-608 (95)', 'Goff Second Floor Rooms: Goff S2-307 A/B (16)', 'Goff Second Floor Rooms: Goff S2-307 C (14)', 'Goff Second Floor Rooms: Computer Lab S2-307D (16)', 'Goff Second Floor Rooms: Goff S2-307 E/F (16)', 'Goff Second Floor Rooms: Goff S2-309 A (21)', 'Goff Second Floor Rooms: Goff S2-309 D (20)', and 'Meeting/Class Rooms: Room S2-205 (14)'. On the right, a calendar grid for Monday, September 14, 2020, is shown. A red arrow points to a shaded area in the calendar grid, indicating a selected time slot. A yellow bar highlights a specific time slot in the calendar grid.

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

1. By clicking on the room (listed at the left) a **Description Page** opens with a description and a picture of the room at the bottom (by clicking on it, it will remain open). You can also view the room when you select a room from the home page, then click on the room title.
2. Select a room or rooms by checking on the box to the left of each room. (you may select more than one room if you need to) Some rooms require you to select a set up in the drop down to the right of the room. It will **NOT** move forward without a selection.
3. At the top of the page, fill out the **Reservation Name**, the **# Of Attendees**, and the drop-down menu next to General. This is the **Color** of the **Reserving Group**. If you check the private box, then your meeting title will not show up on the Touch Panel we suggest leaving this **UNCHECKED** so it will be listed on the Touch Panel.
4. Click **Submit** at the bottom of the page.
5. The **Reservation** page opens with the details of the reservation.

**YOU ARE NOT FINISHED YET IF YOU DON'T CLICK ON "EDIT"
IT WILL "AUTO DELETE"**

NOTE: The Faculty Conference Room (FCR) requires a half hour set up and breakdown time that is automatically added to the reservation. If there is an event immediately before or following the time being booked an error message will appear "Resources Not Available" and the start or end time of the event will need to be adjusted.

Reservation

Service Scheduler Admin - String X Resource Scheduler - Reservation X

umassmed.resourcescheduler.net/Resourcescheduler/RsvInfo.asp?Topic=CNFRM&New=1&ID=-1999626008&RefPage=SearchWizardResults&Msg=

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

UMASS Medical School

HOME RESERVATION WIZARD PLANNER QUICK LINKS

Reservation

Primary Information

Reservation Title	Resources
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

Options	Custom Tabs
No Catering	- No Options -

PIM EDIT FINISHED PRINT

9:24 AM 6/30/2020

1. On the left side under **Reservation; Primary Information** the **Reservation Title**, **Reference Number** and **Created By** information is listed.
2. Below that is the **Reservation Description** with date and time.
3. On the right side is the **Resource** (rooms).
4. There are four tabs at the bottom of the page.
5. Click on the **EDIT** button to open the **Reservation Details** page in order to complete the “**REQUIRED FIELDS**”.
6. **PIM** is not a working feature.

Reservation Details Page

The top screenshot shows the 'Reservation Details' page in Google Chrome. The browser address bar shows the URL: `umassmed.resourcescheduler.net/Resourcescheduler/SchedDtl.asp?ID=-1999626008&New=1`. The page has tabs for 'Details', 'Scheduling Assistant', 'Options', and 'History'. The 'Scheduling Assistant' tab is active. It shows a reservation for 'Test' on 09/14/2020 from 09:00 AM to 11:00 AM. The 'Host' field is set to 'Basic User' with a 'More...' link. The 'Invite' field is set to 'Basic User' with '(1) Attendees'. The 'Description' field is empty. Below the description, there are fields for 'General', '# Of Attendees' (10), 'Private' (checkbox), 'Flag for Follow-up' (checkbox), 'Setup Time' (0), and 'Cleanup Time' (0). There are buttons for 'ADD RESOURCES +', 'REMOVE ALL', and 'ADD SERVICES'. A resource selection box shows 'UMass Medical Rooms - Goff Second Floor Rooms' and 'Goff S2-307 A/B (16) - Pending' with a 'SWAP RESOURCE' button.

The bottom screenshot shows the 'Options' tab. It has fields for 'Account Code' (UMMS/School), 'Second Contact' (Room Reservations), 'Contact Phone' (62264), and 'Reservation Types' (UMMS General). There is a 'No Catering' checkbox and a note '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**.

Resource Scheduler - Reservation Details - Reservation Request Info - Google Chrome
 umassmed.resourcescheduler.net/Resourcescheduler/SchedDtl1.asp?ID=-1999626008&treatAsNew=False&onclose=0

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

Resource Scheduler - Reservation Details - Google Chrome
umassmed.resourcescheduler.net/Resourc scheduler/SchedDt.asp?ValidEmail=1&ID=-1999626008&onclose=0

Request Update Complete

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 Beyer, John Beyer, John 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 - Goff Second Floor Rooms ADD SERVICES

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

SWAP RESOURCE

1. All reservations place a hold on the room(s) selected **Pending Approval** by room reservations.
2. To view a reservation to see if it's pending or approved, click on the reservation from your **Home Page**. The **Reservation Details** page will open.
3. If the reservation is pending, the word **Pending** is noted to the right of each resource/room.
4. When the reservation is approved, the word **Pending** is replaced with **Approved** to the right of the resource/room and the notation (**This reservation is pending approval**) will be gone.
5. In addition, an email is generated to notify the user. (**DO NOT REPLY TO THESE GENERATED EMAILS THEY ARE NOT READ BY ROOM RESERVATIONS**)
6. If you make a change (add another room, change the time etc.) The reservation will go back for approval.

Note: The “?” on the calendar view page in front of the reservation name is a visual indicator that the reservation is pending approval. Once the reservation is approved the “?” mark goes away.

Emailing and other options from the Reservation Details Page

Resource Scheduler - Reservation Details - Google Chrome

umassmed.resourcescheduler.net/Resourcescheduler/SchedDtI.asp?ValidEmail=1&ID=-1999626008&ondose=0

Request Update Complete

Test ID: -1999626008 US - Massachusetts (Eastern)

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

Details Scheduling Assistant Options History

Host Beyer, John Beyer, John More...

Invite Basic User

Description

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

(1) Attendees

Reservation Details Page:

1. To email a reservation to all participants, open the **Reservation Details Page**. To the right side of the invite box click **ATTENDEES**. Participants can be entered manually or selected from the **Resource Scheduler User List** or the **Personal Address Book**. Complete the **Name, Company** (department), **Email** and **Phone** of all participants.
2. On a recurring reservation, go to the bottom of the page and click whether the participants are to be added to **Only This Reservation** or **This and All Future Instances**.
3. Click **Submit** and return to the **Reservation Details Page**
4. On the top right corner of the page, click **MORE** and select **email**.
5. The **Edit Email Notification** page will open. Confirm the email addresses are correct and click **Submit**. An email will be sent with the details of the reservation to all the participants. On a recurring reservation, all the dates on the reservation will be sent.
6. There is a **Print** button that will print the entire reservation, and a **Delete** button, if it is a repeat/recurring use either delete event (to delete one) or delete series (to delete the rest of them from that point onward).
7. **The Reservation Description Box** is used for Reservations for large function spaces (**Faculty Conference Room, Medical School Lobby, Blais Pavilion, ASC Multi-Purpose Room, ASC Auditorium**) must have the **Reservation Description** filled out with the details of the event and who will be attending. This box also needs to be filled out on any reservation that has more than one room attached to it. Add the reason for more than one room and the number of attendees in each of the rooms.
8. **Download** and **Publish** are not working features currently.

Copy Feature

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

Copy Reservation

Description

Reservation Name:

Private: ☐

Reservation Types: **General** ▼

Of Attendees:

Reservation Description:

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

Time

Start:

End:

Setup Time: Cleanup Time:

Resources

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

COPY **CANCEL**

Windows taskbar: 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

The screenshot displays the UMass Resource Scheduler home page. At the top, there's a navigation bar with links to 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. A sidebar on the left lists various rooms under 'UMass Medical Rooms'. The main content area is divided into 'My Reservations' and 'My Favorites'. 'My Reservations' shows two upcoming events: 'Tammi Testing' on Jul 3, 2020, and 'Test2' on Aug 1, 2020. 'My Favorites' shows a calendar view for 'Goff S2-307 A/B' and 'Room S1-123'.

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. At the top, there's a navigation bar with 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. Below this, the 'Search Reservations' title is followed by a 'Scope' section with dropdowns for 'UMass Medical Rooms', 'All Groups', 'All Resource Types', and a text box for '0'. The 'Date' section has radio buttons for 'Current and future dates', 'Dates in the past', and 'Specify', with corresponding 'Start Date' and 'End Date' fields set to '06/30/2020'. The 'Advanced' section includes a 'Text Search' box, checkboxes for 'Search Options Text', 'Search Custom Tabs', 'Search Deleted Reservations', and 'Include Conflict Reservations', and fields for 'Reservation Number', 'User Contact' (with a dropdown showing 'Beyer, John'), 'Contact Role' (dropdown showing 'Any'), and 'Group By' (dropdown showing 'Reservation Date'). At the bottom, there are 'SHOW...' and 'CLEAR' buttons.

Search Reservations: (Under Quick Links dropdown)

1. **Scope:** Select a **Location** (you may pick more than one) keep it **All Groups**, **All Resource Types** and **0** people.
2. **Date:** You can look for future dates, dates in the past or select a specific date.
3. **Advanced:** you can search by reservation number, user contact or title. You can also search for deleted reservations by checking that box.
4. **User Contact:** Click on the silver box which will open a select user window. In the Search Criteria box type your last name. Click Search and select the correct name. This will automatically be added to the user contact box.
5. **Show:** to view the reservations that you were searching for.

The screenshot shows the 'Resource Availability Search' page. It has a similar navigation bar. The 'Scope' section is identical to the first screenshot. The 'Date/Time' section has date pickers for '06/30/2020' and a 'to' field, with 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 checked), 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 'Resource Scheduler' web application. The header includes the University of Massachusetts Medical School logo and the text 'Resource Scheduler'. A navigation bar contains links for HOME, RESERVATION WIZARD, PLANNER, and QUICK LINKS. The main content area is titled 'Scope' and includes several dropdown menus: 'UMass Medical Rooms', 'All Groups', 'All Resource Types', and 'US - Massachusetts...'. There is a 'Filter' button and a text input field with the number '0'. Below this is the 'Date/Time' section, which includes a date picker set to '07/02/2020', a time range from '08:00 AM' to '09:00 AM', and a 'Recurring' section with radio buttons for 'None', 'Daily', 'Weekly' (selected), and 'Monthly'. The 'Until' date is set to '08/28/2020'. The 'Every' section is set to '1 Week(s)'. The 'Days of the Week' section has checkboxes for Sunday through Saturday, with 'Thursday' selected. At the bottom of the form are 'NEXT' and 'CLEAR' buttons. The browser's taskbar at the bottom shows various application icons and the system clock indicating 11:43 AM on 6/30/2020.

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

Search Results

Test2 10 General Private

-- UMass: UMass Medical Rooms --

Thursday, July 02, 2020 (US - Massachusetts (Eastern))

7 AM 8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM 4

☐ First Floor Rooms: Old Lobby-near bookstore (150) No set up required (0)

☐ First Floor Rooms: Old Lobby-only 1 Table (2) Select

☒ Meeting/Class Rooms: Room S2-205 (14)

☐ Meeting/Class Rooms: Room S3-436 (15)

☐ Meeting/Class Rooms: Room S5-105 (25)

☐ Meeting/Class Rooms: Room S6-436 (15)

☐ Meeting/Class Rooms: Room S7-106 (20)

☐ Meeting/Class Rooms: Room S7-402 (18)

☐ Meeting/Class Rooms: Room S7-436 (15)

Academic SOM Academic GSN Academic GSBS UMMS/Administration Student UMMHC/Administration Chancellor/Dean General Grand Rounds External

SUBMIT RETURN

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.**

Reservation

Primary Information

Reservation Title Test2 Resources UMass Medical Rooms - Meeting/Class Rooms - Room S2-205

Reference Number -1999626006

Created By Basic User

Reservation Description

Date and Time

Starting Thursday, July 2, 2020 8:00 AM US - Massachusetts (Eastern)

Ending Thursday, July 2, 2020 9:00 AM US - Massachusetts (Eastern)

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

Additional Information

Options Custom Tabs

- No Options -

PIM EDIT FINISHED 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

Resource Scheduler - Reservation Details - Google Chrome
umassmed.resourcescheduler.net/Resourcescheduler/SchedDtI.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
umassmed.resourcescheduler.net/Resourcescheduler/SchedDtI4.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 shows the 'Recurring' reservation page in the UMass Medical School Resource Scheduler. The page title is 'Recurring' and the reservation details are 'Test 3 | Jul 20, 2020 9:00 AM - Jul 20, 2020 10:00 AM | US - Massachusetts (Eastern) | UMass Medical Rooms; Meeting/Class Rooms; Room S2-205'. A message at the top states '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 times for the recurring reservation:

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

At the bottom, there is a 'RETURN' button and a warning icon with the text 'To change recurring settings, delete and re-add the reservation.' The left sidebar shows a navigation menu with 'HOME' and 'RESERVATION' options, and a list of rooms including ACC Building, Albert Sherman Center, Benedict Building, Lazare Research Building, Medical School Outpatient, South Street Campus, UMass Medical Rooms, Amphitheater, First Floor Rooms, Goff Second Floor, and Meeting/Class Rooms. The right sidebar shows a 'Basic User' profile and a 'Help' button.

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

Resource Scheduler - Home Page X Resource Scheduler - Home Page X

umassmed.resourcescheduler.net/Resourcescheduler/default.asp#

Apps New Tab Resource Scheduler... Welcome to Room... EPI Server Login AzureSpace TouchP... HR Direct - UMass... UMMS Internet UMass Secure Acc... Resource Scheduler... Resource Scheduler... Resource Scheduler... Other bookmarks

University of Massachusetts Medical School

HOME RESERVATION

UMass

UMass

ACC Building

Albert Sherman Ce

Benedict Building

Lazare Research B

Medical School Ou

South Street Cam

UMass Medical Ro

Amphitheater

First Floor Room

Goff Second Floo

Meeting/Class R

Room S2-205

Room S2-351

Room S2-352

Room S3-402

Room S3-436

Recurring

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

☐ Daily, until 08/03/2020

Recurring

☒ Every 1 Day(s)

☐ Every Weekday

☐ Ad hoc

Date 08/03/2020 Add

☐ Treat recurring schedule as separate bookings

☒ Weekly, until 09/07/2020

Recurring

Every 1 Week(s)

☐ Sunday

☐ Tuesday

☐ Thursday

☐ Saturday

☒ Monday

☐ Wednesday

☐ Friday

☐ Monthly, until 08/03/2020

Recurring

☐ The 1st day of every 1 month(s)

☒ The 2nd Sunday of every 1 month(s)

SUBMIT RETURN

Basic User Help

Jul 2, 2020 Schedule

More...

Show full day

7 PM 8 PM 9 PM

9:42 AM 7/12/2020

1. Using the **Reservation Wizard**; select your first room in the series. After filling out your **Options** page and saving it, click on the word **REPEAT** at the top of the reservation details page next to end time (refer to the red arrow on page 18).
2. Select one of the 3 options;
 - For **Daily** select:
 - a. Every 1 Day(s) OR
 - b. Every Weekday
 - For **Weekly** select:
 - c. Every 1 Week (s)
 - d. Check off the day(s) of the week
 - For **Monthly** select:
 - e. The 1st day of every 1 month(s) OR
 - f. The 1st **Sunday** of every 1 month (s)
3. You will come to the page above. Select 1 of 3 recurring options: **Daily, Weekly or Monthly** and add an end date in the appropriate box. Picture shows weekly on a Monday until 9/7/2020 Click submit.
4. If you have **Conflicts** they will need to be fixed (refer to page 19).

Revising a Reservation

The screenshot shows the 'Resource Scheduler' web application. The main content area displays the 'Reservation Details' for an event titled 'Test 4' (ID: -1999625990) on 08/03/2020 from 08:00 AM to 10:00 AM. The event is currently in a 'Pending' status. The page includes tabs for 'Details', 'Scheduling Assistant', 'Options', and 'History'. The 'Details' tab is active, showing fields for 'Host' (Basic User), 'Invite' (Basic User), and 'Description'. The 'Description' field contains the text 'UMass Medical Rooms - First Floor Rooms' and 'Room S1-123 (30) - Pending'. Below the description, there are buttons for 'ADD RESOURCES +', 'REMOVE ALL', and 'SWAP RESOURCE'. The 'SWAP RESOURCE' button is highlighted. The left sidebar shows a navigation menu with 'HOME' and 'RESERVATIONS' options. The top right corner has 'CANCEL', 'SAVE', and 'MORE' buttons. The bottom of the page shows a Windows taskbar with various application icons and a system clock indicating 11:39 AM on 7/1/2020.

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 shows the 'Planner View' interface for the UMass Medical Resource Scheduler. At the top, there's a navigation bar with links like 'HOME', 'RESERVATION WIZARD', 'PLANNER', and 'QUICK LINKS'. Below this, the 'Planner View' title is followed by a 'Daily Event Planner' tab and a search bar. The 'Search Options' section includes a location dropdown set to 'UMass Medical Rooms', a filter dropdown set to 'All', a date input set to '09/21/2020', and a location dropdown set to 'US - Massachusetts...'. There are 'SEARCH' and 'CLEAR' buttons, and a 'More Options +' link. The main area displays a calendar grid for 'Monday, September 21, 2020 (US - Massachusetts (Eastern) Time Zone)'. The grid shows various rooms and their availability, with colors indicating different categories: red for Academic SOM, orange for Academic GSN, yellow for Academic GSBS, green for UMMS/Administration, blue for Student, dark blue for UMMHC/Administration, purple for Chancellor/Dean, grey for General, dark grey for Grand Rounds, and black for External. A legend at the bottom identifies these categories. The grid shows that the Amphitheater I S2-102 is available from 8am to 11am, while the Amphitheater II S4-102 and Amphitheater III S6-102 are booked from 8am to 4pm. The First Floor Rooms: Room S1-123 is booked from 8am to 9am. The First Floor Rooms: Library Conference Room is booked from 11am to 12pm. The First Floor Rooms: Lazare Auditorium S1-6 is booked from 8am to 4pm. The First Floor Rooms: Hiatt Auditorium S1-608 is booked from 8am to 11am.

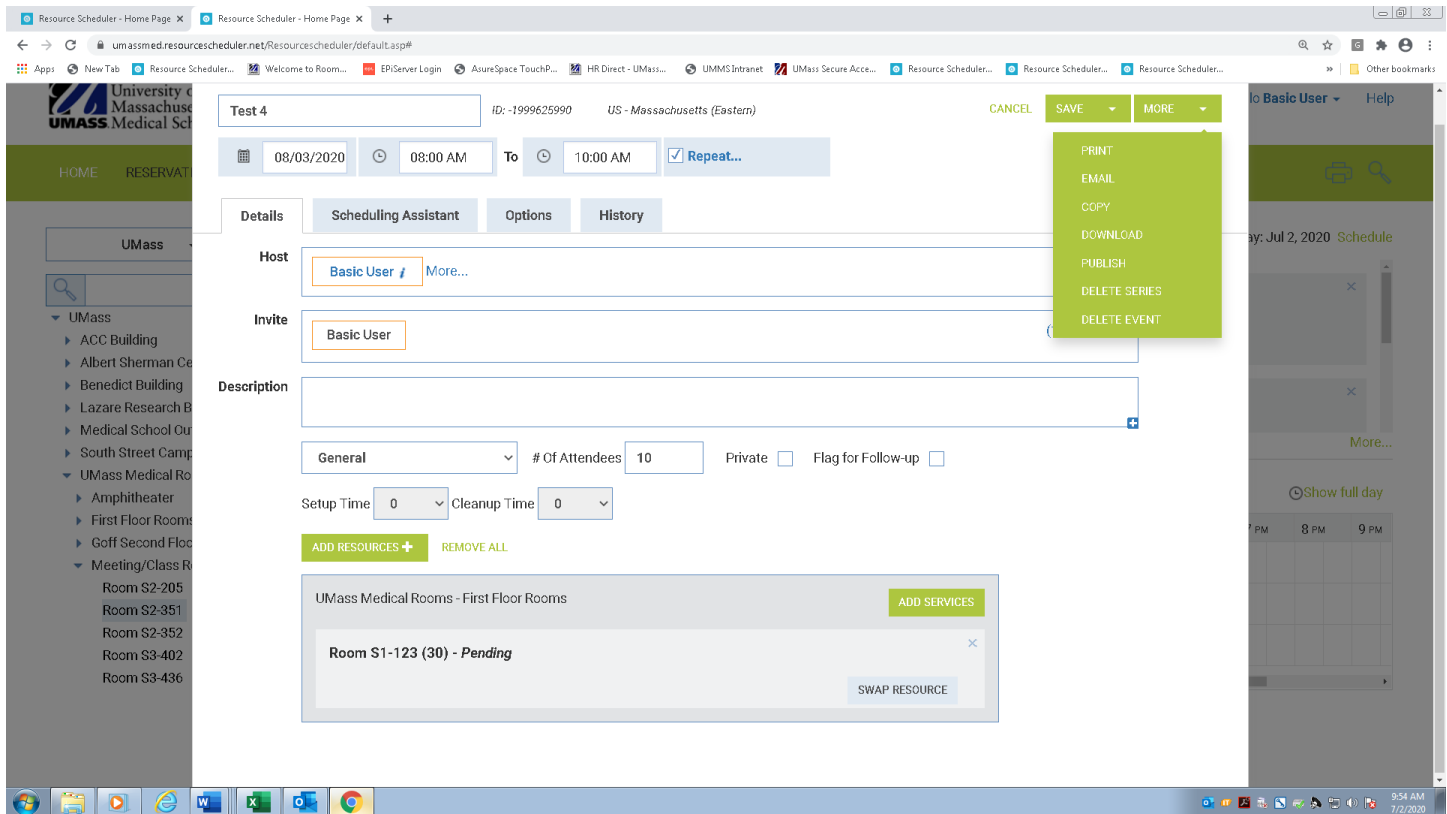
The Planner View allows you to view quickly what is available on the date and time that you select. Search Options: Select a Location, ALL, and the date. There are two views select either **More Options** or **Less Options**. Scroll up or down. To **View** the rooms, click on the **Room Title**.

Ad Hoc – Adding a single date to a reservation

The screenshot shows the 'Recurring' page in the UMass Resource Scheduler. 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. The 'Ad Hoc' tab is selected, showing a date of 08/04/2020 with an 'Add' button. The page also includes options for recurring schedules (Daily, Weekly, Monthly) and a 'SUBMIT' button.

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' window in the Resource Scheduler. The reservation details are as follows:

Field	Value
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
Account Code	UMMS/School
Second Contact	Cynthia Cote
Contact Phone	62264
Reservation Types	UMMS General

At the bottom of the form, there is a green 'SUBMIT' button and a 'MORE...' link.

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

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;

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 +

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

The screenshot shows a web browser window with the URL `resourcescheduler.umassmed.edu/resourcescheduler/schedule.asp?Topic=RES&TopicId=60`. The interface has a top navigation bar with three steps: 'Select Service', 'Select Item', and 'Confirm Order'. The 'Select Service' step is currently active. Below the navigation bar, there is a table with the following data:

ROOM SET UP	Price	Quantity
FCR Banquet Rounds		<input type="text" value="5"/>
FCR Chairs		<input type="text" value="50"/>
FCR Rectangle Tables		<input type="text" value="0"/>

At the top right of the form, there are 'CANCEL' and 'NEXT' buttons. The 'NEXT' button is highlighted in blue. The browser's taskbar at the bottom shows the time as 11:04 AM on 6/29/2020.

The screenshot shows the 'Confirm Order' step of the resource scheduler. It displays contact information for 'Beyer, Jonn' and a summary of the order.

Contact Information:

- Name: Beyer, Jonn
- Email: John.Beyer@umassmed.edu
- Phone: 508 856-1046
- Department: Director of Space Planning
- Account Code: UMMS

Order Management:

- Status: New Order
- Phase: Not Submitted

Order Summary Table:

Qty	Description	Item Options	Item Notes	Price Each	Total
EBS FCR Services EDIT					
5	FCR Banquet Rounds	- None -	- None -	\$0.00	\$0.00
50	FCR Chairs	- None -	- None -	\$0.00	\$0.00
Order Subtotal					\$0.00
ORDER TOTAL					\$0.00

At the bottom of the page, there is a copyright notice: 'Copyright © 2000-2016 Asure Software. All rights reserved.' The browser's taskbar at the bottom shows the time as 11:02 AM on 6/29/2020.

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