Resource Scheduler 2.0 User Guide – For Creators

MedIT, Resource Coordination Team

May 2019

Version 1.0

CONTENTS

OVERVIEW

Resource Scheduler is Faculty of Medicine's web-based system to reserve rooms and video conference sessions, and request onsite technical support.

This training guide provides a step-by-step orientation on Resource Scheduler 2.0 for users with permissions to create and approve reservations.

PERMISSIONS

In this guide, we refer to these users as Creators or Approvers. Please check with the Resource Coordination Team if you are unsure of your permissions.

Permission Level	All Resource Scheduler Users	People Assigned Create Permissions	People Assigned Approve Permissions
View Reservations	✓	✓	✓
Create Reservations		✓	✓
Approve Reservations			✓

APPROVER PERMISSIONS

Approvers are typically inter-site room bookers (IRBs) with permission to:

- create reservations for their regional local rooms, both video conference enabled rooms and non-video conference enabled rooms
- create reservations for onsite technical support for local rooms in which onsite support is provided
- approve reservation requests for their regional local rooms from Resource Scheduler users who do not have approval permissions for these rooms

Approvers do not have permission to create or approve reservations for video conference sessions or recorded sessions. Requests for these types of sessions are submitted to the Resource Coordination Team through the Online Reservation Form or RoomFinder.

CREATOR PERMISSIONS

Creators are typically site bookers, event organizers, program managers or room stewards with permission to:

- create reservations for the rooms assigned to them
- creators may be limited to creating reservations for non-video conference enabled rooms, for a certain room type, or for one or two specific rooms at their location, depending on their responsibilities

Creators do not have permission to create reservations for video conference sessions, recorded sessions or sessions requiring onsite technical support. Requests for these types of sessions are submitted to the Resource Coordination Team through the Online Reservation Form or RoomFinder.

Reservations created by creators will initially show a "Pending" status beside the room booked, once approved it will show "Approved". For existing RS creators the understanding is reservations are going to be approved, unless there are issues with the room or equipment and the creator will be notified if a reservation needs any adjustment.

LOGGING INTO RESOURCE SCHEDULER

TEST ENVIRONMENT

A test environment has been set up with copies of real reservations, so people can practice using Resource Scheduler. Please remember, this is a test environment and subject to change. If you create reservations in the test environment, they are for testing purposes only, please name them "Test Bookings" as a best practice.
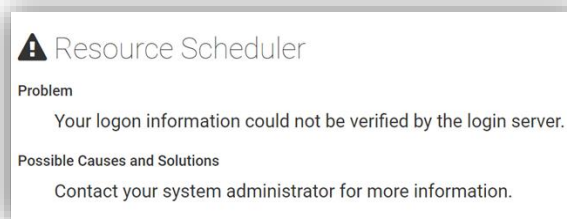
💡 Use Chrome as your browser

Step 1: Enter this URL into your web browser: https://ubcuat.resourcescheduler.net/resourcescheduler

Step 2: You will be prompted to enter your CWL login ID and password.

If you do not have a CWL account, please complete the Room Reservation Access Request Form.

If you are unable to login using your CWL or receive an error message, your account may not be fully configured. Contact the Resource Coordination Team at resourcecoordination.info@ubc.ca for assistance.

⚠ Resource Scheduler

Problem

Your logon information could not be verified by the login server.

Possible Causes and Solutions

Contact your system administrator for more information.

PRODUCTION ENVIRONMENT

The new link to the live RS 2.0 environment will be separately sent to all existing RS users by email upon successful launch of RS 2.0.

Add the Resource Scheduler URL to your bookmarks upon receipt and access the URL using Chrome web browser.

Pop-ups must be allowed in the browser for the Resource Scheduler site.

You must add Noreply@resourcescheduler.net to your safe sender list, to ensure you receive email confirmation notifications from Resource Scheduler.

SETUP YOUR PROFILE

You can customize your Resource Scheduler profile so it works better for you. Once you have logged into Resource Scheduler, follow these steps to customize your profile.

Step 1: Click on your name in the top right corner of the window. You will see a drop down box with "My Information". Click on "My Information"
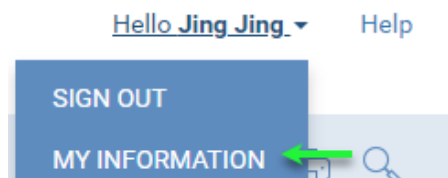
Step 2: Set up your default view. Your selection of the most common city, building and type of room will be presented to you each time you open Resource Scheduler.

Default View	Vancouver
Default Location	Diamond Health Care Centre
Default Group	Video Conference Rooms

Step 3: The **Default Calendar View** sets your preference for which calendar view is shown. You may choose Daily, Weekly or Monthly.

Step 4: Time Format choices will show the calendar in an AM/PM format or in 24-hour format.

Step 5: To be reminded of the **End of Recurring Reservations**, check that box. You can designate the minimum number of reservations that must be in the series before you are notified and at what point (number of remaining occurrences) the reminder should be sent.

new RS 2.0 has a new feature. As a Creator or Approver, your new reservations will automatically generate email confirmation notifications to the people you include in your reservation (Requested For/Requested By).

Step 6: Check "Edit Notification Emails" so you have the option of editing notifications before they are sent.

Step 7: Check "Receive Confirmation Emails" if you want to receive copies of confirmation emails for all of the reservations you create. If you find that you no longer want to receive confirmation emails, just update your profile.

EMail Options

Edit Notification Emails ☑

Receive Confirmation Emails ☑

Step 8: Make it easier to find your favourite rooms or your reservations by customizing your home page

Home Page Layout

Top Panel	Show My Favorites
Bottom Panel	Show My Reservations

Step 9: Click the **Submit** button to save your choices.

NAVIGATION TREE

Start by clicking on the Home Tab

| HOME | RESERVATION WIZARD | PLANNER | QUICK LINKS ▾ |

new You will notice that **the Navigation Tree** (the drop down list of sites and rooms) looks a bit different. The tree has been reorganized into 5 levels:
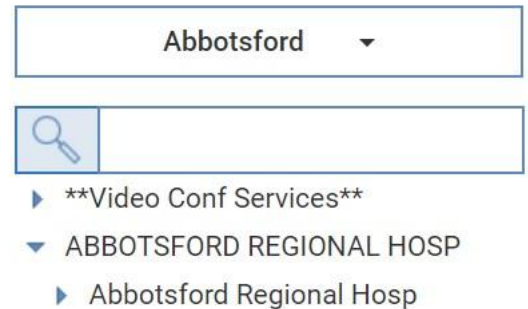
Level 1: City - You can select a city for which you want to view rooms

Level 2: Site – All of FoM's academic (university) and clinical (hospital) sites are listed in CAPITAL letters

Level 3: Building – Under each site, you will find a list of buildings at that site

Level 4: Room Type – Rooms are grouped as Non-VC Rooms and VC Rooms. Sometimes you will see sub-groups such as Enhanced Clinical Skills Rooms or Case Based Learning Rooms

Level 5: Rooms – Rooms are sorted alphabetically and numerically

| Abbotsford ▾ |

🔍

▸ **Video Conf Services**
▾ ABBOTSFORD REGIONAL HOSP
  ▸ Abbotsford Regional Hosp

💡 Some sites have only one building, so the site and the building may have similar names; however, the site will be presented in CAPITAL letters and the building will be presented in lower case.

💡 You can find a list of all cities, sites and buildings in the Appendices
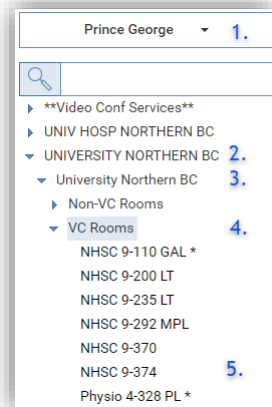
Step 1: Select your city by clicking on the drop down menu

Step 2: Select your University/Academic site or your Hospital/Clinical site

Step 3: Select your building

Step 4: Select your room type

Step 5: Select your room

Prince George ▾ **1.**
🔍
▸ **Video Conf Services**
▸ UNIV HOSP NORTHERN BC
▾ UNIVERSITY NORTHERN BC **2.**
  ▾ University Northern BC **3.**
    ▸ Non-VC Rooms
    ▾ VC Rooms **4.**
      NHSC 9-110 GAL *
      NHSC 9-200 LT
      NHSC 9-235 LT
      NHSC 9-292 MPL
      NHSC 9-370
      NHSC 9-374 **5.**
      Physio 4-328 PL *

> The site **Video Conf Services** contains Conference IDs, External Site Endpoint Aliases, Recordings and VC Anywhere Licenses. This is used for Videoconference bookings only by the Resource coordination team.

VIEW ROOM CALENDAR

The **Room Calendar** will be presented in a window to the right of the tree.

💡 If you want to see **Room Details**, hover over the **Room Name** on the calendar. If you want to add the room to "**My Favorites**", click on the star beside the **Room Name**

CREATING RESERVATIONS

USING THE RESERVATION WIZARD:

Reservation Wizard searches for available rooms using several filters. When choosing a recurring pattern for a meeting, the results show only those rooms available for every instance of the pattern. This avoids conflicts that would need to be resolved. Reservation Wizard also provides an easy way to reserve more than one room for a meeting.

FIND A ROOM(S)

Step 1: Click **Reservation Wizard** in the **Toolbar** or the **Quick Links** drop-down to be guided through a step-by-step process.

Step 2: Use the wizard to set the criteria for the search.

Step 3: The first drop-down sets the location(s). Select one or multiple locations, or select All. Specific locations can be clicked in the list, and the header of the drop-down will reflect the number selected. Selected options are highlighted in blue. To deselect, click the highlighted option(s). Click elsewhere in the page to close the menu box.

Step 4: If a single location is selected, one or more groups can be selected in the next column. Specific groups can also be selected.

Step 5: Use the **Resource Type** to choose one or more types of spaces for the search. Select All for all types.

Step 6: Enter **Capacity** to find a room large enough for the meeting, if appropriate.

Step 7: If specific room atrributes are needed, use the **Filter** to select them.

You will find new room attributes listed to help you target your search.

Date/Time

📅 06/07/2016   🕐 [ ]   to   🕐 [ ]

Step 3: Specify the **Date, Start** and **End** times.

Step 4: To show only spaces available at that day and time, check the **Only Available Resources** box. If a recurring pattern is **chosen, only spaces available for every instance of the series will be shown.**

Step 5: Click on **Next** to return the results that match your criteria.

💡 All creators will only be able to reserve rooms they currently have permission to

SELECT A ROOM(S)

Your meeting time will be highlighted in the results grid. Other meetings appear as colored blocks.   View meeting details by hovering your cursor over other events.

Search Results

☑ Reservation Name	👤 0	☐ Private

-- VANCOUVER GENERAL HOSP: Diamond Health Care Ce --

☐ 🔒 DoM Pathology: DHCC 2201 * (12)

☐ 🔒 DoM Urological Sciences: DHCC 6150 * (12) | Boardroom (12)

☐ 🔒 VC Rooms: DHCC 2230 (10) | Boardroom (12) ▼

☐ 🔒 VC Rooms: DHCC 2250 (10) | Boardroom (12) ▼

☐ 🔒 VC Rooms: DHCC 2252 (10) | Boardroom (12) ▼

☐ 🔒 VC Rooms: DHCC 2254 (10) | Boardroom (12) ▼

☐ 🔒 VC Rooms: DHCC 2256 (10) | Boardroom (12) ▼

Numbers in parentheses indicate the maximum capacity for the room based on the selected **Setup Style**.

A room with a **Blue Lock** icon requires approval. 🔒. The room is held for you pending an approval by the Resource Coordination Team or the inter-site room bookers. A response will be provided within 24 hours. Reservations created by the Resource Coordination Team are automatically approved.

To view details about a room or space, click on its name in the list.

DHCC 11116

Description	DHCC 11116
Building	Diamond Health Care Ctr:VC Rooms
Resource Type	Meeting Room
Contact Info	Shirley Yee; 604-875-4111 x62381; roombooking.fom@ubc.ca **** Rose Amann; 604-875-4834; postgrad@postgrad.med.ubc.c
Capacity	10
Reservations require approval	Yes
Additional Information	
Time Fence	A Fixed Date 2020-6-30 (Apply Limit to non-Recurring Schedules) (Location Level)

Options

VC-Capable	Yes
Endpoint Alias	32210@med.ubc.ca

CREATE A RESERVATION

Step 1: Type the **Reservation Name** in the field provided. The name will be used to identify the reservation in Resource Scheduler and on email confirmation notices. Please try to follow this convention in naming your reservation. (Get convention from Shirley)

Step 2: Check the box for the room(s) you want to reserve, choose a setup style if applicable, and click **Submit** at the bottom of the page.

Setup Style – Some rooms have more than one setup style, and each setup style has a different capacity, which is indicated as (##) after the setup style name. We have defaulted the setup style to the style most commonly used, but you can change it to see what the capacity is if you layout the room in a different style.

For all video conference enabled rooms, there is a "Video Conference" set up style that shows you the maximum capcacity for a video conference session in that room.

Step 3: You will be taken to the **Reservation Confirmation** window. Click **Edit** at the bottom of the page to open the Reservation Details page, used to complete the required fields, add services or include other details.

Reservation Confirmation

Primary Information

Reservation Title   RCT Test Reservation

Reference Number   -1999431246
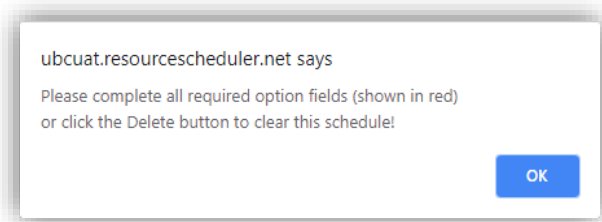
Created By   Kirsty Farquharson

Resources

Diamond Health Care Centre - Video Conference Rooms - DHCC 2230
Resource Setup: Boardroom

Diamond Health Care Centre - Video Conference Rooms - DHCC 2250
Resource Setup: Boardroom

COMPLETE THE OPTIONS TAB

You will be on the Reservation Details Tab, where you can fine-tune your reservation. You must complete the mandatory fields in the Options Tab first, Resource Scheduler won't allow you to save any changes in the Details Tab until these fields are completed.

> ubcuat.resourcescheduler.net says
>
> Please complete all required option fields (shown in red) or click the Delete button to clear this schedule!
>
> OK

new Five mandatory fields have been added to Resource Scheduler on the Options Tab. These mandatory fields were introduced to standardize how we collect data about the users and utilization of our rooms.

If you see a red exclamation mark on the Options Tab, it means there are mandatory fields that require completion before you can continue.

i All mandatory fields must be completed for every reservation. Any reservation without these will be automatically deleted by the system.

| Details | Options ! | Change Log | History |

Organization

Association Type

Association

Session Purpose

Session Type

# of Attendees per Room

Step 1: Click on the **Options** Tab

Step 2: Start with **Organization**. Click on the grey button

Step 3: Click on **Select** to see the organization options. Pick the the organization that is requesting the reservation

Criteria Value

SELECT

Select criteria above and click the 'Select' button to display.

Organization
+ UBC Faculty Of Medicine
+ Health Authority
+ UBC
+ Student

If you select an organization other than UBC Faculty of Medicine, you will be presented with only one choice in the "Association Type" and "Association" fields (N/A). This is because we do not need to collect this information for reservations other than UBC Faculty of Medicine.

Step 4: Complete each mandatory field in the order listed, as their choices are dependent on what you chose in the previous field.

Go to the Appendices to see a complete list of all the options for each of the mandatory fields

Step 5: Enter number of attendees. If you have selected more than one room, you need to enter the number of attendees for each room, separated by a comma, in the order the rooms are listed on the reservation. For example, if you have selected three rooms, you would enter 12, 8, 20

Ensure to save your changes before you leave for any another tab or close the reservation, or changes will be lost.

Step 6: Depending on whether your reservation has one or more instances, you may be presented with a pop up window asking if you want to save these changes for **This and All Future Reservations** or **Only This Reservation.** Since Options apply to all instances of the reservation, select **This and All Future Instances**

Save	✕
⚠ Update only this reservation or this and all future instances?	
This and All Future Instances Only this Reservation	

COMPLETE THE DETAILS TAB

Reservations can be flagged for tracking purposes if there will be additional changes to the information. Other users will not see the reservation as flagged. In the Reservation Details page, check the box labeled **Flag for Follow-up**. Flagged reservations can be listed by clicking the **More** link under **My Reservations**.

Details	Options	External Sites	Change Log	History

Host **Kirsty Farquharson** *i*   More...

Invite Kirsty Farquharson

Description

\# Of Online Attendees 0   Private ☐   Flag for Follow-up ☐

Setup Time 0 ▾ Cleanup Time 0 ▾
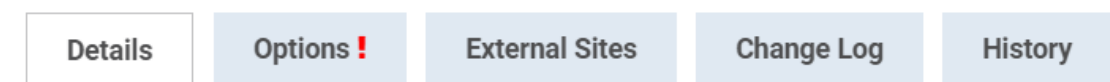
ADD RESOURCES ＋   REMOVE ALL

# of Online Attendees is for RCT use only

Private is for RCT use only

Setup and Cleanup Time can be adjusted by the creator of the reservation
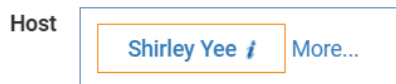
REQUESTED FOR & REQUESTED BY

Step 1: Click on the Details Tab

Invite Field - You will notice your name is automatically placed in the Invite field, as you are the Creator of this invitation or reservation.

Host Field - This field is used to capture the names of the person for whom the reservation is being made (Requested For) and the name of the person who is making the request on his/her behalf (Requested By). This field will accept one or two names, but no more than two names.

Step 2: Click on "More" in the Host Field.

Step 3: A pop up window to enter Requested For and Requested By information will appear. Resource Scheduler will auto fill the contact information if the name entered is a Resource Scheduler user or if the person has been added to the Address Book.

If booking is not complete or ready for notification email to be sent out to the person entered into these fields, **do not check "Send Email Notices" until ready.**

Step 4: Check off "Send Email Notices" if you want the Requested For or Requested By contacts to receive an email confirmation notification.

ADD A CONTACT TO THE ADDRESS BOOK

Step 1: Click on the Address Books link

Step 2: Click on Create New Contact

Step 3: Enter the contact information. At a minimum, you must enter "Display Name", "Email", and "Phone" fields

Share this contact with other Resource Scheduler users by checking these options:

Share Contact Globally
☑

Allow Global Editing
☑

Step 4: Add additional rooms by clicking the **Add Resources** button. Click **Show**. Only available resources will be shown.

Step 5: Click the **Save** button at the top of the page when finished. Back at the confirmation page, click **Finished** to be returned to Reservation Wizard to continue making reservations.

MAKING A RESERVATION RECURRING

In the Reservation Details page, select the **Repeat** checkbox edit the recurrence pattern.

Use the **Ad Hoc** feature to add days which do not fit one of the standard patterns. To edit an existing series, click the **Options** link next to the **Repeat** checkbox.

Resolve any conflicts that occur. See Manage Conflicts for more information.

Be careful with your Start Date and the Day of the Week or Day of the Month you select for a recurrence. If your Start Date is on Thursday, May 2 and your Day of the Week for recurrence is Friday, Resource Scheduler will create the first reservation on Friday May 3, not on your Start Date.

It is recommended to NOT use the checkbox for "treat as separate bookings". This will create a separate reservation for each reservation which will require each reservation to be edited separately rather than as a series.

When managing recurring reservations, there will be an option to make a change to a single instance or that instance and all future.
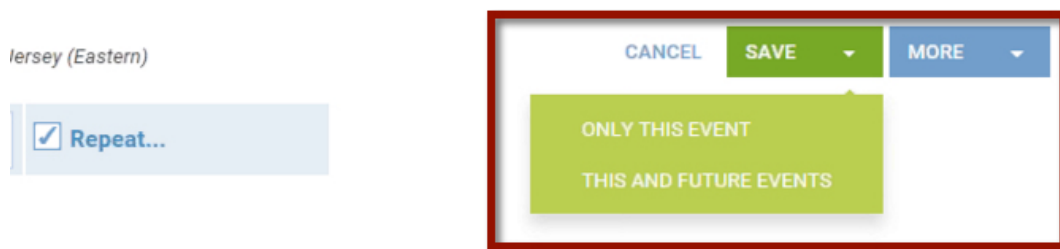
The same applies to canceling reservations. There will be an option to delete the single event or the rest of the series.

To add services, click the **Add Services** button. See the **Request Onsite Technical Support** section for more details.

To e-mail information regarding this reservation, click **More** at the top right and choose the **Email** options. See the **Send Notification** section for more details

USING THE DAILY PLANNER VIEW

Daily Planner View provides the ability to view, manage and create reservations across one location for a single day. To view it, click on the **Planner** button in the tool bar.
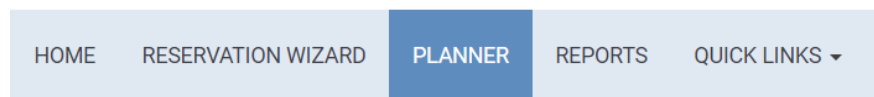
Step 1: Choose the **Scope** for the search. Specific Locations and/or Resource Types can be selected. Most users prefer not to limit the **Resource Type** or **Capacity** when using **Daily Planner View**. Select the **Date**.
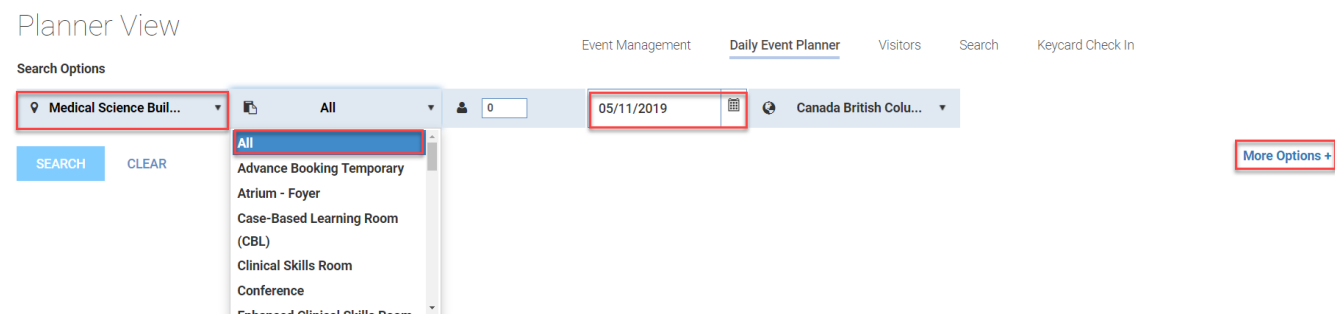
Step 2: Click the **More Options** link to see additional filters. If desired, choose the **Display Settings** for information to be displayed in the grid. **Title** is the most common option. Most other filters will not apply to your location. Click **Less Options** to collapse the filters again.

Planner View

Search Options

| Medical Science Buil... ▾ | All ▾ | 0 | 05/11/2019 | 📅 | Canada British Colu... ▾ |

Display Settings	Title ▾		Reservation Custom Tabs	All ▾
Event Status	All ▾		Host Name	...
Event	All ▾			
Service Order Placed	☐			

SEARCH   CLEAR

Less Options -

Step 3: Click the **Search** Button.

Step 4: The search criteria can be collapsed by clicking on the **Hide** link in the upper right hand corner. If the search was for today, a **Red Line** indicates the current time. Existing reservations appear as colored blocks in the grid.

Hide -

Planner View

Event Management   **Daily Event Planner**   Visitors   Search   Keycard Check In

Search Options

| Medical Science Buil... ▾ | All ▾ | 0 | 05/11/2019 | 📅 | Canada British Colu... ▾ |

SEARCH   CLEAR

More Options +

Saturday, May 11, 2019 (Canada British Columbia Time Zone)

	12am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm
-- UNIVERSITY OF VICTORIA: Medical Science Building -- Saturday, May 11, 2019 (Canada British Columbia)																								
Non-VC Rooms: MSB 105						↻? Test I	↻ test networ				↻? Test I									↻ Test ne				
Non-VC Rooms: MSB 108																								
Non-VC Rooms: MSB 112						↻? Test I														↻ test ne				
Non-VC Rooms: MSB 139																								

Reservations will appear in different colours: Symbols may appear beside some reservations:

New Reservations	**Light Grey**
Copied Reservations	**Dark Grey**
Migrated Reservations	**Blue**

🔁   Recurring Reservation

?   Reservation is pending, subject to approval

✱   Onsite technical support requested on this reservation

↑   Arrow Up – Set Up Time
Arrow Down – Clean Up Time

(new) We have migrated two years of historical reservations into RS 2.0. These will be colored blue on the Planning Calendar

💡 Hovering over an existing reservation displays a pop-up window with links to **Edit**, **Details** and **Delete**. You can only make changes if you created the reservation or have permission to edit other people's reservations.

Edit opens a Quick Reserve-style window for quick changes.

Details opens the Reservation Details page for more advanced editing.

Delete allows you to cancel the reservation.

Click on an available time in the grid to open a **Quick Reserve** template, which is similar to the Quick Reserve in Schedule

USING QUICK RESERVE

Use **Quick Reserve** to create a reservation from the **Schedule View**. This method is especially easy when you know what room you want to reserve. In Home view, clicking on the desired city in the **Navigation Tree** (on the left side of the screen) will open this view. Clicking on a single room in the Tree will open its **Schedule View**.

To change dates for the **Schedule View**, tabs at the top provide **Day**, **Week**, **Month and Timeline** views.

Step 1: When viewing the schedule, click on an open block of time. This will open the **Quick Reserve** window.

Step 2: Enter the **Reservation Title**, **Setup**, **Date**, **Start** and **End** times for the reservation. If the reservation is for another Resource Scheduler user, begin typing their name in the **Requested For** field. After 3 or 4 characters, a drop-down list of options will appear if they are an existing RS user.

Step 3: Click **More** to open the details page to add additional information.

Step 4: Complete the mandatory option field in the **Options** tab

Step 5: When finished entering details, click **Save,** which will return you to the Calendar View.

EDITING A RESERVATION

To review information about a reservation or update the reservation, click on the **Reservation Title** in the **Schedule View**, **My Reservations**, **My Flagged Reservations** or in any search results.

MODIFYING A RESERVATION

    Creators can edit only the reservations they created.

Step 1: Click on the link to the reservation you are interested in editing.

Step 2: In the **Reservation Details** page, make necessary changes to the reservation. The meeting **Requested For** and **Requested By** contacts will be notified of the change if you have selected **Send Email Confirmations**.

    If your reservation has more than one occurrence, ensure you are viewing the first occurrence to which you want to apply the changes, as Resource Scheduler will apply the changes to occurrences being viewed and in the future.

Step 2: If you are prompted by this pop up when you save changes, select whether you want your change to apply to **This and All Future Instances** or to **Only this Reservation**

Step 3: If a date or time change results in a conflict, a warning prompt will appear. Read the prompt and resolve the conflict. See the **Manage Conflicts** section for details.

Step 4: Click **Save.**

COPYING A RESERVATION

Step 1: Click on the link to the reservation you are interested in. In the Reservation Details page, click the **More** button at the top right. Select the **Copy** option.

Step 2: Depending on the original reservation you are copying, you will be given options of details to copy, including Requested For, Requested By, Options, and Services.

CANCEL   SAVE   MORE   ▼

PRINT

EMAIL

COPY

DELETE
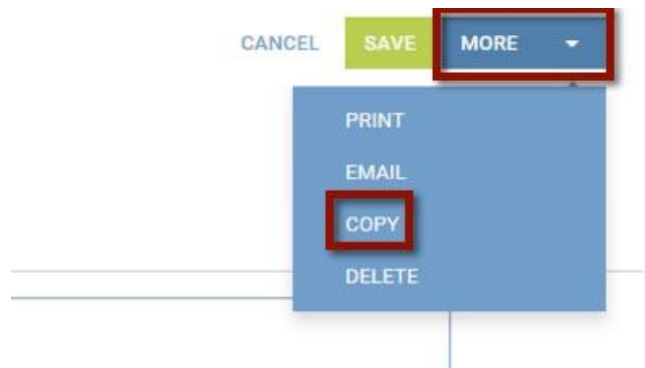
Copy Reservation

Description		Time	
Reservation Name	DMCBH Neuroscience Research Colloquiu	Start *	[ ] 📅 11:00 AM 🕐
Private	☐	End *	12:00 PM 🕐
# Of Online Attendees	0	Setup Time	30 ▼ Cleanup Time 0 ▼

Reservation Description:

UBCO Research Collaboration Tech to support by setting up the call and remotely displaying content on the left and right screens at CBH 101 LT.   No support at CBH LT host site.

▼ Resources

▼ Conf ID, Ext Sites, Rec - Conferences
☑ ⓘ ID 30228 - *Approved*

▼ Centre for Brain Health - VC Rooms
☑ ⓘ CBH 101 LT (120) - *Approved*
Lecture Theatre (122) ▼

▼ Medical Science Building - VC Rooms
☑ ⓘ MSB 107 (10) - *Approved*
Boardroom (12) ▼

☑ Copy Attendees & Visitors

☑ Copy Requested For/By

Step 3: Click **Copy** at the bottom left

Step 4: Resolve any conflicts that occur. See the **Manage Conflicts** section for details

CANCELLING A RESERVATION

There are two ways of cancelling a reservation:

From Home Page - My Reservations

Step 1: Click on the **X** at the top right of the box for the reservation you wish to cancel.
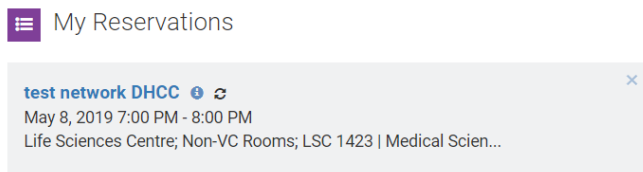
📋 My Reservations

test network DHCC ⓘ ↻   ✕
May 8, 2019 7:00 PM - 8:00 PM
Life Sciences Centre; Non-VC Rooms; LSC 1423 | Medical Scien...

Step 2: Click **OK** to confirm.

Step 1: Click on the link to the reservation you are interested in cancelling.

Step 2: In the **Reservation Details** page, click the **More** button. Select the **Delete** option.
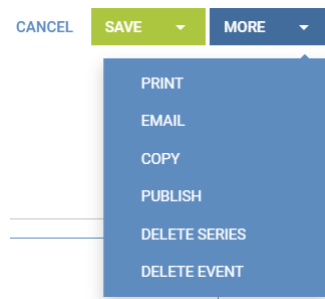
Step 3: Click **OK** to confirm

MANAGING CONFLICTS

If a room is unavailable for one of the days in your recurring pattern, you will be prompted to resolve the conflict.
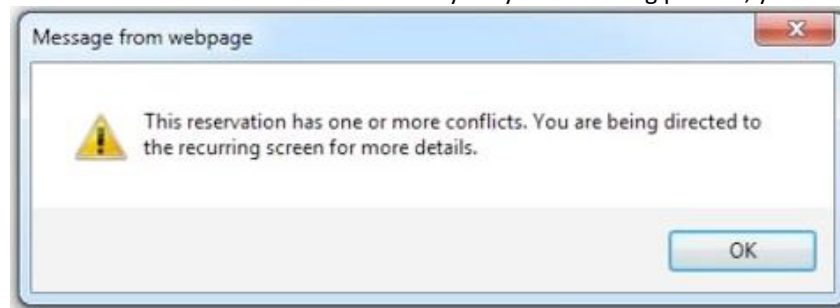
Icons indicate the status of a specific occurrence:

✓	Room is reserved
⚑	Reservation changed, Room reserved
ⓘ	Conflict

Recurring

Workshop | Jun 26, 2017 1:00 PM - Jun 26, 2017 5:00 PM | US - New York (Eastern)
NY - New York City; 10th Floor; Room 1012

ℹ Recurring Update Completed
❗ There are conflicts in this series.

Ad hoc Date [   ] 🗓 ADD   Extend End Date [   ] 🗓 EXTEND

✔ Monday, June 26, 2017   (0 Reservation ID)
✔ Tuesday, June 27, 2017   (0 Reservation ID)
❗ Wednesday, June 28, 2017 (View Calendar)   (0 Reservation ID)   1:00 PM - 5:00 PM   **Location**: NY - New York City; 10th Floor; Room 1012
✔ Thursday, June 29, 2017   (0 Reservation ID)
✔ Friday, June 30, 2017   (0 Reservation ID)

Step 1: Select the instance which is unavailable, and click on the meeting date.

Step 2: From the **Reservation Details** page, click on the **Add Resources** button. For recurring reservations, change only one instance at a time.

| Standard Meeting ⬍ | # Of Attendees [10] | Private ☐ | Flag for Follow-up ☐ | Meeting Ha |

Setup Time [0] ⬍ Cleanup Time [0] ⬍

ADD RESOURCES +   REMOVE ALL

NY - New York City - 10th Floor

Room 1012 (10) - *Approved* ❗   ✕

Rectangle Table (10) ⬍

Step 3: Choose the group of rooms to search and click **Show**. A list of available rooms is shown. Select an alternate room for this instance of your recurring meeting, and click **Submit**.

Step 4: Click the **X** for the room highlighted in red to remove the conflict.

| Standard Meeting ⬍ | # Of Attendees [10] | Private ☐ | Flag for Follow-up ☐ | Meeting Ha |

Setup Time [0] ⬍ Cleanup Time [0] ⬍

ADD RESOURCES +   REMOVE ALL

NY - New York City - 10th Floor

Room 1012 (10) - *Approved* ❗   ✕

Rectangle Table (10) ⬍

NY - New York City - Conference Center   ADD SERVICES

Jets (12)   ✕

Rectangle Table (12) ⬍

Step 5: Click **Save** to save your change. Choose **Only This Event**.

Step 6: Resolve remaining conflicts in a similar manner.

Step 7: To determine whether there are unresolved conflicts, click the **Home** button in the ribbon.
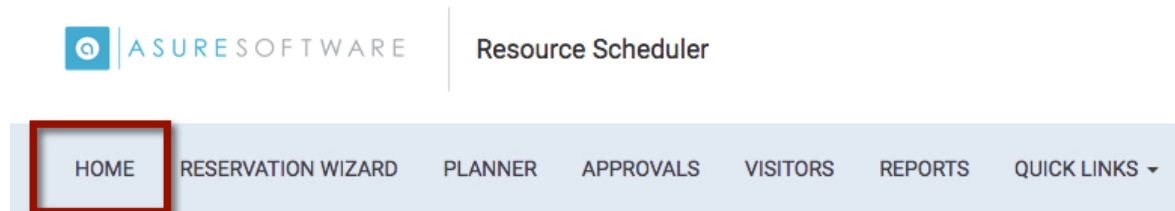
Step 8: Under the **My Reservations** section, click the **More…** link.
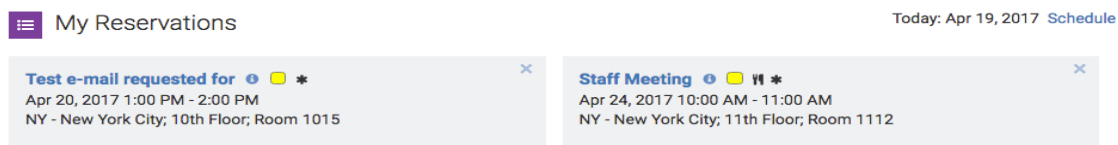
Step 9: Check the box for **Conflicts Only**. If a conflict appears in the list, click on it and resolve using the steps above. Once all conflicts are resolved, the message "**No items were found for that selection…**" will appear.
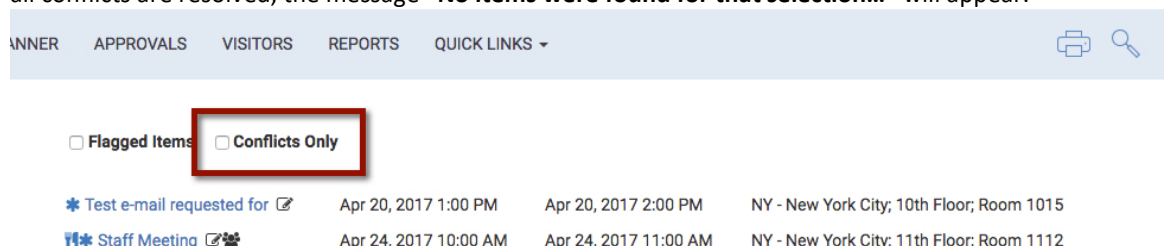
USING THE CHANGE LOG

new We have added a new tab to Resource Scheduler, called Change Log. This is a tab for Resource Scheduler creators and approvers to record the date and reason behind modifications to the reservation. Not all changes to a reservation warrant a record in the Change Log. However; changes to dates, rooms, technology and technical services should be recorded on the Change Log.

A checkmark beside the Change Log tells you there are entries on the Change Log

Add your updates to the Change Log to the first occurrence of the reservation. When saving or updating, save for "This and All Future Instances" so all change records accumulate on the first reservation. This will ensure we have one place to look when investigating the history of a reservation.

Step 1: Click on the blue **+** sign to the far right of the window

Step 2: Enter information into the three fields

Step 3: Click Save

FLAGGING A RESERVATION FOR FOLLOW UP

Reservations can be flagged for tracking purposes if there will be additional changes to the information. Other users will not see the reservation as flagged. In the Reservation Details page, check the box labeled **Flag for Follow-up**. Flagged reservations can be listed by clicking the **More** link under **My Reservations**.

SEARCHING FOR RESERVATIONS

The Search Reservations link under the Quick Links in the **Ribbon** allows you to search for reservations. Options include:

- Narrow results by setting the **Scope**, **Resource Type** and **Capacity**

- Search across dates ranges in the future or past, or specify a range of dates

- Use the **Resource Types** button to be more selective about locations and rooms in the search

- The **Text Search** is a required field. Type part of the reservation name in the field

    Use a wildcard if you don't know the exact format of your search criteria (%)

- If you check the box for **Search Deleted Reservations**, the search will include cancelled meetings or events

- If looking for a specific reservation created or assigned to a Resource Scheduler user, click the gray box next to the **User Contact** field and locate the correct user

DISPLAYING RESOURCE AVAILABILITY

The **Display Resource Availability** link under the Quick Links in the **Tool Bar** allows you to search for room with specific criteria. Options include:

- Limit the search by **Scope**, single **Resource Type** and **Date** and **Time** ranges

- By clicking on the **Advanced** link, you can also filter by

    o Different **Resource Types** at different locations;

    o Specific **Resource Setup styles**

    o Specific **Resource Characteristics** (Room Attributes)

SENDING EMAIL CONFIRMATION NOTIFICATIONS

new Email confirmation notifications will be sent automatically by Resource Scheduler when a reservation is created, cancelled, or the date/time or rooms are changed. In addition, Resource Scheduler users can send an email notification whenever they choose.

Step 1: Click on the Menu Drop Down. Select Email

Step 2: The Requested For/Requested By contacts will be in the "To" field if you have selected that they are to receive emails. You can remove one or both of them if required.

You can also add another contact in the Add Email field. This email contact does not need to be in the reservation. This is useful if you want to send a copy of the email notification to a generic or shared email address
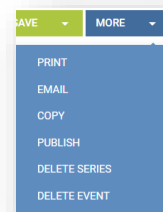
Step 3: Select the format of the email. There are two formats for the email confirmation

PLAIN TEXT NOTIFICATION

If you select Plain Text, you can edit the Email Subject Line AND the text within the body of the notification. This is useful if you need to include a note or reminder to the creator and the Requested For/Requested By contacts. However, the plain text confirmation has no formatting and is not easy to read.

Edit EMail Notification   RESET   **SUBMIT**

From   kfarquharson@edgeltd.com

To   jennifer.white@ubc.ca   **ADD EMAIL**   alex.kennedy@ubc.ca

REMOVE

Subject   Reservation Information - UG Year 2 Small Group - Endocrinology o

Format   ● Plain Text   ○ HTML (standard template only, body cannot be edited)

Body

Jenny and Alex - I added the rooms you requested. Onsite Tech Support has also been added.

Resource Coordination Team

Resource Scheduler Notification
Reservation Title: UG Year 2 Small Group - Endocrinology of Puberty Workshop

Reservation Information
        Date and Time: Thursday, September 19, 2019 from 1:00 PM until 3:00 PM Canada British Columbia
Start Time (with setup): Thursday, September 19, 2019 12:30 PM

HTML NOTIFICATION

If you select HTML you can edit the Email Subject Line BUT NOT the text within the body of the notification. The HTML format has formatting and is much easier to read than the Plain Text version. **Whenever possible, please select the HTML format**

.

Step 4: Modify the email Subject Line if required

Step 5: Add notes to the email confirmation if required and Plain Text selected as format

Step 6: Click **Submit**

EXAMPLE OF AN HTML NOTIFICATION

new   Instructions on how to connect to different types of sessions are included in the notification. Hyperlinks to additional information and Terms & Conditions are embedded into the notification

> **Tip**: Confirmations are sent automatically from noreply@resourcescheduler.net.
> For questions, changes, or cancellations, please forward to
> medit.resourcecoordination@ubc.ca.

Approved: status of your reservation

Resources: rooms & resources booked including conference ID & recording, if applicable

For recurring session, this is first occurrence only

Rooms & resources booked for each date in the recurrence

How **participants can connect** to the session.

Note: there are different connection options based on the type of conference. Options for all types of conferences are listed here

Resource Scheduler Notification	
Reservation Information	
Reservation Title: Sample Meeting Title	**Date and Time:** Sunday, May 5, 2019 from 10:00 AM until 11:00 AM Canada British Columbia
	Start Time (with setup) : Sunday, May 5, 2019 10:00 AM
	End Time (with cleanup): Sunday, May 5, 2019 11:00 AM

Resources: Canuck Place: Sun Room Approved All Future
Conferences: ID 30101 Approved All Future
DoM Nephrology: DHCC 5299 * Approved All Future
Recordings: Recording 01 Approved All Future
VC Anywhere: VC Anywhere 2 Approved All Future
VC Rooms: MSB 210 Approved All Future

External Sites

Site Name University of Alberta
Room ID Boardroom HSC 2
End Point Alias 210 142.1.112.46
Tech Contacts and Notes Sally Smith 403 444 5555
Test Completed Yes

Recurring Details: Recurring Every Week On Sunday Until Sunday, June 16, 2019

May 5, 2019, 10:00 AM - 11:00 AM DHCC 5299 *,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2
May 12, 2019, 10:00 AM - 11:00 AM DHCC 2254,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2
May 19, 2019, 10:00 AM - 11:00 AM DHCC 5299 *,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2
May 25, 2019, 10:00 AM - 11:00 AM DHCC 5299 *,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2
Jun 9, 2019, 10:00 AM - 11:00 AM DHCC 5299 *,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2
Jun 16, 2019, 10:00 AM - 11:00 AM DHCC 5299 *,ID 30101,MSB 210,Recording 01,Sun Room,VC Anywhere 2

General Information

Action Performed By: Jing Jing
Requested For: Sarah Mair
Requested By: Kirsty at UBC

Connection Information

Local Session, No Video Conference	No connection required. Have a great session!
Video Conference using Faculty of Medicine Video Conferencing services	Find the Conference ID assigned in this reservation. Select connection:

Chrome Web Browser
Go to https://meet.vc.ubc.ca/ and enter the Conference ID
User guide and test call

Skype for Business Account Holders
In the Contact box, enter **<Conference ID>@vc.ubc.ca**
User guide, test call: 82998@vc.ubc.ca

Telephone Participants
Dial toll-free 1-844-521-0666, followed by the Conference ID and # |
| **Video Conference using VC Anywhere** | **Online Participants**
Go to http://webex.med.ubc.ca/webex#. Replace the # at the end of this web address with the number that appears next to VC Anywhere in the Resources section.
For example, enter http://webex.med.ubc.ca/webex2

Telephone Participants
Find the Conference ID assigned in this reservation.
Dial toll-free 1-844-521-0666, followed by the Conference ID and #

Information for Participants
VC Anywhere General User Guide, iOSMobileGuide, AndroidGuide, ModeratorGuide |
| **Video Conference using UBC, Health Authority or Third-Party Video Conferencing** | As these are not Faculty of Medicine sessions, the event organizer at UBC, the Health Authority or third party will provide connection information |
| **Technical Assistance** | Call the **MedIT Service Desk**
1-877-266-0666, press 2 for support |
| **Terms & Conditions** | Please see Room Booking Terms & Conditions for information on the responsibilities assumed by an Event Organizer. |

Date & time of event

For recurring session, date & time of first

External sites may appear here or under "Resources" depending on the site

Recurrence pattern if applicable

Action Performed By: person who created the booking in Resource Scheduler

Requested For: person who the booking was requested for, if indicated on request

VC Anywhere: to connect, replace the # at the end of the web address with the number that appears next to VC Anywhere in "Resources"

Tip: When you paste the reservation into a meeting invite, it pastes as a table. Remove sections that aren't relevant by selecting the appropriate information and deleting the row.

RESOURCES:

Watch the quick video version of this training by clicking on the links below:

[Video: How to navigate and personalize Resource Scheduler](#)

[Video: How to create a room reservation in Resource Scheduler](#)

CONTACT AND SUPPORT:

Have a question or need assistance with login in?

Contact the Resource Coordination Team at medit.resourcecoordination@ubc.ca or call 1-877-266-0666 Option 3.

APPENDICES

FACULTY OF MEDICINE SITES AND BUILDINGS

City	Sites – Academic and Clinical	Buildings by Site
Abbotsford	Abbotsford Regional Hospital	Abbotsford Regional Hospital
Burnaby	Burnaby General Hospital	Burnaby General Hospital
Campbell River	Campbell River Hospital	Campbell River Hospital
Vancouver	Children & Women's Hospital	Child & Family Research Institute (CRFI Building)
Vancouver	Children & Women's Hospital	Children & Women's Hospital
Vancouver	Children & Women's Hospital	Children & Women's Hospital Portable
Vancouver	Children & Women's Hospital	Children & Women's Hosp Clinical Support
Vancouver	Children & Women's Hospital	Children & Women's Hospital Shaughnessy
Chilliwack	Chilliwack General Hospital	Chilliwack General Hospital
Comox	Comox Valley Hospital	Comox Valley Hospital
Duncan	Cowichan District Hospital	Cowichan District Hospital
Dawson Creek	Dawson Creek & District Hospital	Dawson Creek & District Hospital

City	Sites – Academic and Clinical	Buildings by Site
Fort St. John	Fort St. John's Hospital	Fort St. John's Hospital
Kelowna	Kelowna General Hospital	Kelowna General Hospital
Trail	Kootenay Boundary Regional Hospital	Kootenay Boundary Regional Hospital
Nelson	Kootenay Lake Hospital	Kootenay Lake Hospital
North Vancouver	Lions Gate Hospital	Hope Centre
Terrace	Mills Memorial Hospital	Mills Memorial Hospital
Nanaimo	Nanaimo Regional General Hospital	Nanaimo Regional General Hospital
Prince Rupert	Prince Rupert Regional Hospital	Prince Rupert Regional Hospital
Richmond	Richmond Hospital	Richmond Hospital
Richmond	Richmond Hospital	Richmond Hospital Portable
New Westminster	Royal Columbian Hospital	Royal Columbian Hospital
Kamloops	Royal Inland Hospital	Royal Inland Hospital
Victoria	Royal Jubilee Hospital	Royal Jubilee Hospital Coronation Annex
Vancouver	St. Paul's Hospital	St. Paul's Hospital

City	Sites – Academic and Clinical	Buildings by Site
Surrey	Surrey Memorial Hospital	Surrey Memorial Hospital
Prince George	University Hospital of Northern BC	University Hospital of Northern BC
Vancouver	University of British Columbia	Biomedical Research Centre
Vancouver	University of British Columbia	David Strangway Building
Vancouver	University of British Columbia	Detwiller Pavilion UBC Hospital
Vancouver	University of British Columbia	Djavad Mowafaghian Centre for Brain Health
Vancouver	University of British Columbia	Friedman Building
Vancouver	University of British Columbia	Gerald McGavin Building
Vancouver	University of British Columbia	Instructional Resource Centre
Vancouver	University of British Columbia	Life Sciences Centre
Vancouver	University of British Columbia	Pharmaceutical Sciences Building
Vancouver	University of British Columbia	St. John Hospice
Kelowna	University of British Columbia Okanagan	Reichwald Health Sciences Centre

City	Sites – Academic and Clinical	Buildings by Site
Prince George	University of Northern British Columbia	University of Northern British Columbia
Victoria	University of Victoria	Medical Science Building
Vancouver	Vancouver General Hospital	Blackmore Pavilion
Vancouver	Vancouver General Hospital	City Square Shopping Centre
Vancouver	Vancouver General Hospital	Diamond Health Care Centre
Vancouver	Vancouver General Hospital	Eye Care Centre
Vancouver	Vancouver General Hospital	Jim Pattison Pavilion
Vancouver	Vancouver General Hospital	Medical Students & Alumni Centre
Vancouver	Vancouver General Hospital	Rural Coordination Centre of BC
Vernon	Vernon Jubilee Hospital	Vernon Jubilee Hospital
Victoria	Victoria General Hospital	Victoria General Hospital
Port Alberni	West Coast General Hospital	West Coast General Hospital

ORGANIZATION AND ASSOCIATION TYPES

Organizations	Association Types

• UBC Faculty of Medicine	• Departments and Schools • Administrative Support Units • Research Centres and Institutes
• Health Authority	N/A
• UBC	N/A
• Student	N/A
• Public	N/A

FACULTY OF MEDICINE ASSOCIATIONS

Departments & Schools	Administrative Support Units	Research Centres & Institutes
Anesthesiology, Pharmacology & Therapeutics	Admissions	BC Cancer Agency Research Centre
Audiology & Speech Sciences	Alumni Affairs	BC Centre on Substance Use
Biochemistry & Molecular Biology	Clinical Faculty Affairs	BC Children's Hospital Research Institute
Biomedical Engineering	Clinical Partnerships & Professionalism	Biomedical Research Centre
Cellular & Physiological Sciences	Communications	Centre for Blood Research
Dermatology & Skin Science	Development	Centre for Excellence in Indigenous Health

Emergency Medicine	Education	Centre for Health Education Scholarship
Family Practice	Facilities	Centre for Health Evaluation & Outcome Sciences
MD Undergraduate Program (Y1-Y4)	Faculty Affairs	Centre for Health Services & Policy Research
Medical Genetics	Finance Service Team	Centre for Heart Lung Innovation
Medicine	Government Relations	Centre for Hip Health and Mobility
Obstetrics & Gynaecology	Human Resources	Centre for Molecular Medicine and Therapeutics
Occupational Science & Occupational Therapy	IT (MedIT)	Djavad Mowafaghian Centre for Brain Health
Ophthalmology & Visual Sciences	Medical Students & Alumni Centre	Human Early Learning Partnership
Orthopaedics	Office of the Dean	ICORD
Pathology & Laboratory Medicine	Purchasing	Institute of Mental Health
Pediatrics	Research	Life Sciences Institute
Physical Therapy		Providence Health Care Research Institute

Population & Public Health		UBC Centre for Disease Control
Psychiatry		Vancouver Coastal Health Research Institute
Radiology		Vancouver Prostate Centre
Surgery		W. Maurice Young Centre for Applied Ethics
Urologic Sciences		Women's Health Research Institute

MD Undergraduate Program is not a Department, but we need to represent it as one in Resource Scheduler

Current to March 1 2019

SESSION PURPOSES, SESSION TYPES AND RESOURCE TYPES

Session Purpose	Session Type	Resource Type
Academic - Teaching & Learning	Academic Full Day	Atrium – Foyer
UG Year 1	Academic Half Day	**Bridge**
UG Year 2	Clinical Skills Session	Case-based Learning Room
UG Year 3	Conference	Clinical Skills Room
UG Year 4	Exam	Enhanced Clinical Skills Room
Undergraduate (Multi-Year)	Grand Rounds	**External Site**
Postgraduate	Interview	Gross Anatomy Lab
Continuing Professional Development	Lecture	Lecture Theatre
Research	Meeting	**License**
Health Authority Teaching	Rounds	Multipurpose Lab
Other Academic Institution Teaching	Seminar	Multipurpose Room
Health Profession Program	SIM Session	On-call Room
Other	Small Group	Plinth Lab
FoM Administration & Operations	Tutorial	Portable VC Unit
FoM Governance		**Recording**
Health Authority Business		
Other Academic Institution Business		
UBC Student Event		**Used by RCT Only**
Community Event		
Other		