# ABM User Guide

Advance Booking Manager (ABM) is a web-based portal where you can create, manage, and submit your Advance Booking requests.

ABM replaces the previous Excel spreadsheet and has been designed to improve the user experience when creating submissions.

If you have any questions about ABM, please reach out to the FoMDS Resource Coordination team at fom.resourcecoordination@ubc.ca.

*User Guide last revised 2/24/2023*

THE UNIVERSITY OF BRITISH COLUMBIA

**Digital Solutions**
Faculty of Medicine

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# Logging into ABM

Navigate to https://apex.med.ubc.ca/ords/collaboration/r/abm
and enter your CWL and CWL Password.

# Create a New Reservation

Click on either Advance Booking Form, or "Create a New Reservation" and fill out the form.

# Reservation Request Form

Example of the reservation request form interface:

# Booking Request Icons

Draft of a request

Submitted request

Rejected request

# Save a Draft of a Booking 📝

From the Advance Booking Form, click "Save draft and stay on this page" or "Save draft and Return to my Requests" to save a draft.
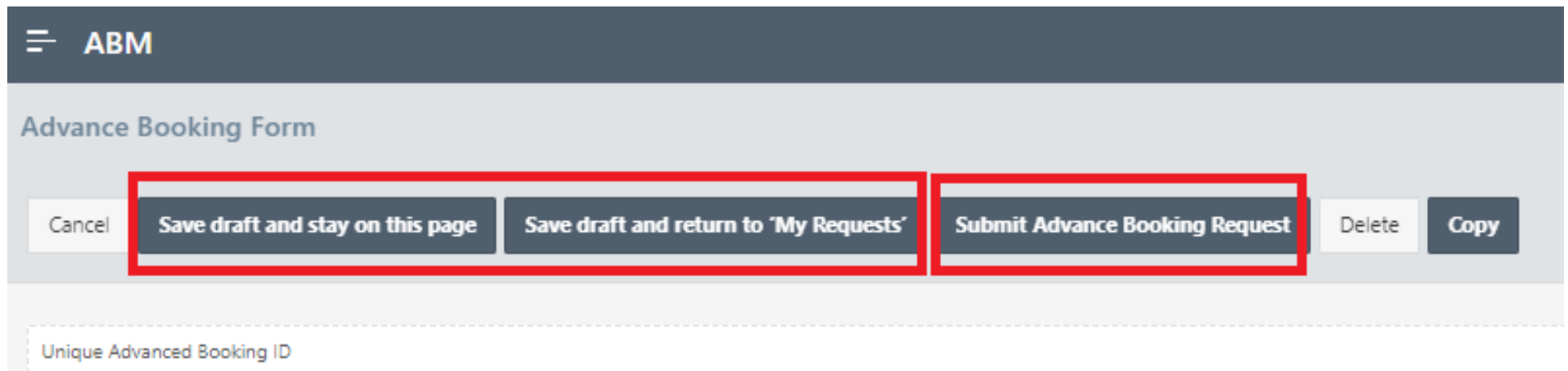
"Save Draft and stay on this page"

- Saves your work and does not navigate away from the Advance Booking Form. You can continue to view and edit the request

"Save draft and Return to my Requests"

- Saves your work then navigates back to your My Requests main dashboard

**Note:** The "Submit Advance Booking Request" button is only visible during the Advance Booking submission period.

# Edit/View an Existing Request

From the Dashboard, locate the booking you wish to edit and press "Edit/View". After editing, you can save as a draft or submit.

**Note:** This function is only available for drafts and rejected requests.

# Submitting a Booking ✅

The "Submit Advance Booking Request" option will only be visible as of the start date of Advance Booking per our submission timelines.

From the Advance Booking form, click "Submit Advance Booking Request" to submit your completed booking. You will be prompted with a warning message about committing to the submission.

**Note:** Once a booking has been submitted, it cannot be edited unless it is rejected.

# Rejected Requests ⊠

Requests are rejected by the Resource Coordination Team in the event of:

- Insufficient or incomplete information

- Text in Additional Info field does not align with resources requested

- Requested dates fall outside of bookable window:
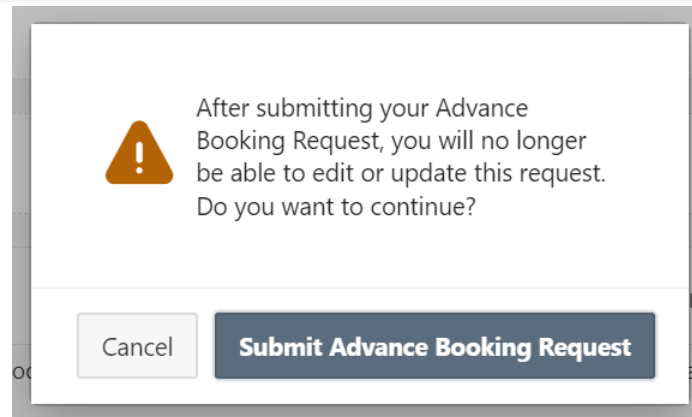
  - e.g., Submitting Winter/Spring dates while current Advance Bookings are open for Summer/Fall

  - e.g., The request is for a date that is currently bookable via RoomFinder

- Ineligibility for Advance Booking – e.g., student events, which can be submitted during General Booking

ABM has built-in features which largely prevent errors regarding missing or inconsistent request information.

In the event a request is rejected, participants receive an email notification and may re-submit once the request has been updated.



**Student Event**
2/24/2023 0645 to 0800

**Submitted for Approval:** No

Rejection reason: Ineligible for Advance Booking. Please submit request during General Booking.

Edit/View        Share Request



Request ID 6081 can not be completed, please update

F    fom.resourcecoordination@ubc.ca
                                          10:10 AM

Hello,

Your booking request (ID 6081) cannot be completed for the following reason(s):
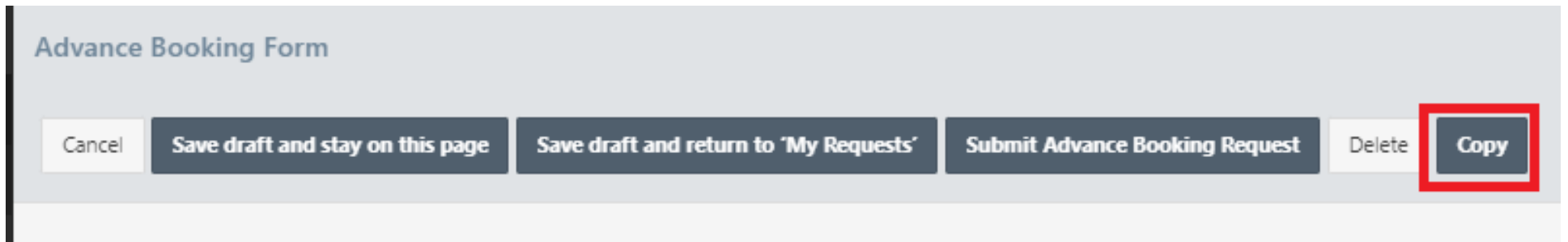
*Ineligible for Advance Booking. Please submit request during General Booking.*

Please correct the issue(s) and resubmit your request. Click here to be taken directly to your request. If you have any questions please contact us via email (fom.resourcecoordination@ubc.ca), or phone (1-877-266-0666, option 3).

# Copying an Existing Booking

Press "Edit/View" on the booking you wish to copy, and select
"Copy" on the Advance Booking Form.

**Note:** A submitted form can still be copied. The copy is a draft until
you click submit.

# Sharing a Booking
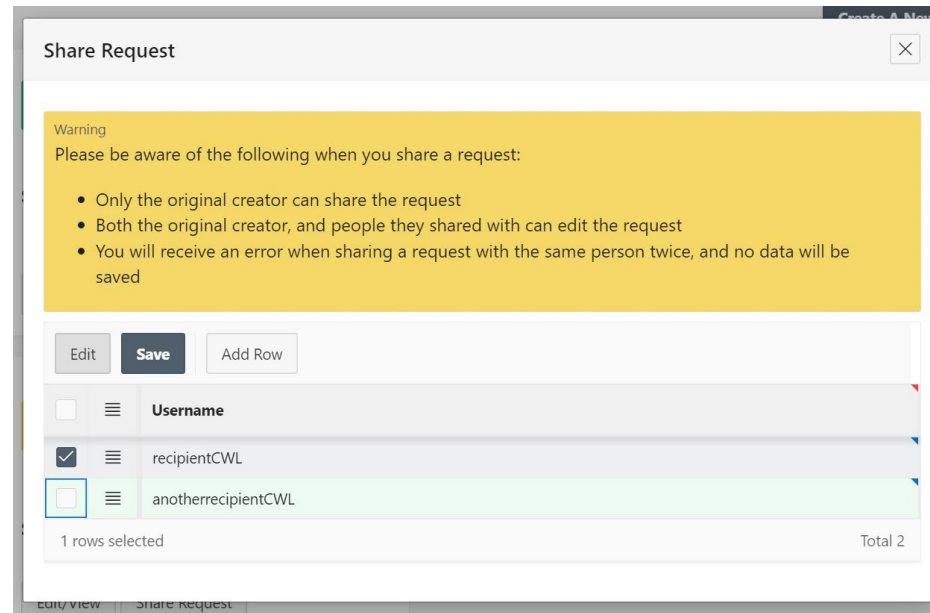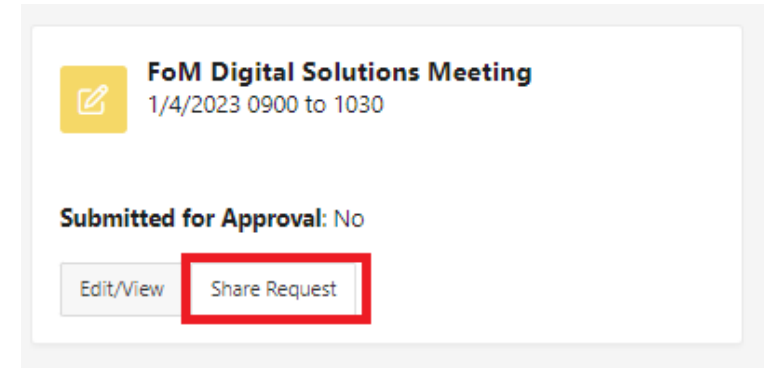
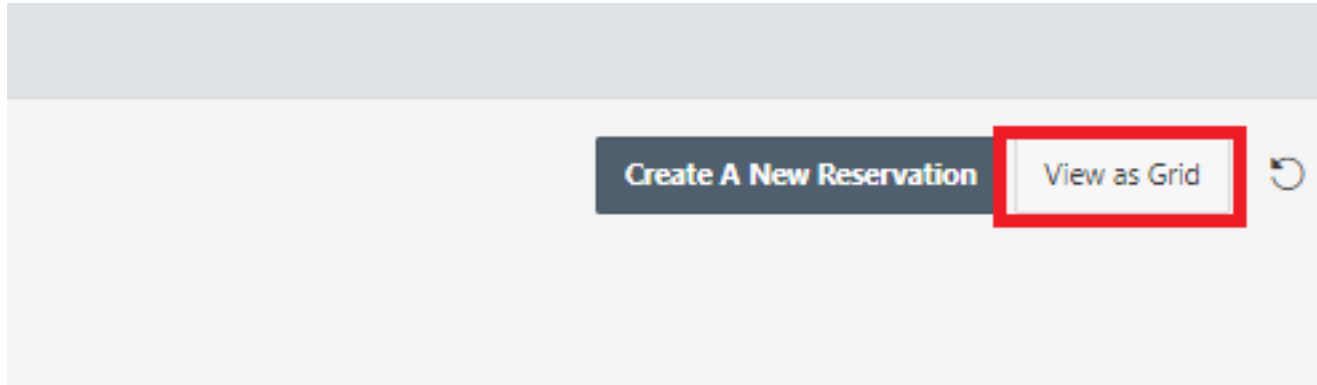Sharing a booking can be useful if booking responsibilities are being transferred to another member of your team.

Only the original creator can share a booking. Once shared, the new user is able to edit the same booking.

1) From the Dashboard, locate the Booking you wish to share, and press "Share Request"

2) From the pop-up, double click on the space below "Username" and enter the **CWL** of the person you wish to share the booking with. If desired, you may add multiple users by clicking "Add Row"

3) Click anywhere outside of the white box and press "Save"

# Grid View

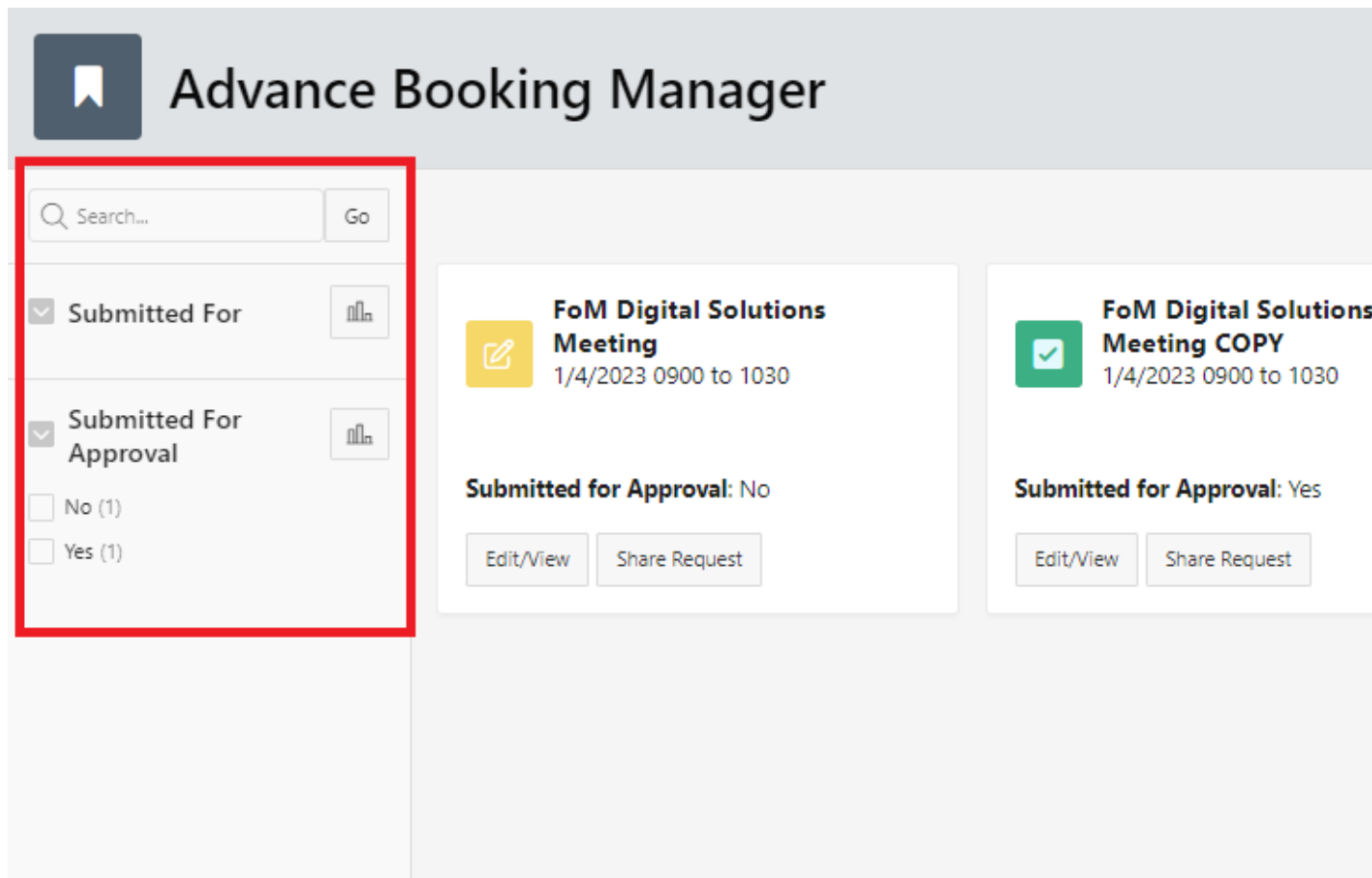Press "View as Grid" to see your bookings in a list-based view.

# Search Bar

Use the "Search" functionality in and "Submitted For/Submitted for Approval" filters (on the left-hand side of the page) to find a specific booking.
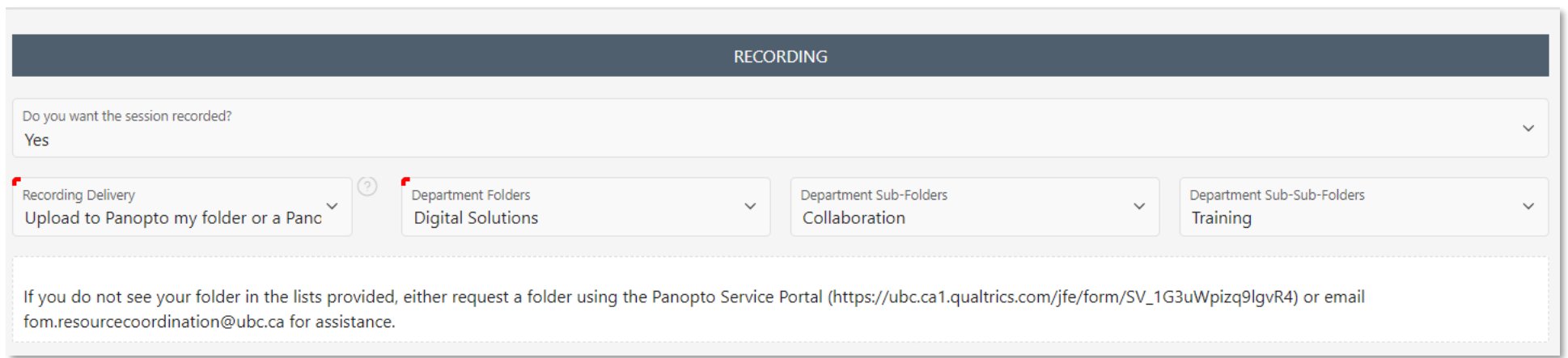
# Recording Folders

Recording Folders are used for storing recordings via the Panopto or Entrada platform. Alternatively, you may choose to have the recording emailed to you as a stream-able, downloadable weblink.

If a session needs recording, you can specify the recording destination using drop-down menu format.

For Panopto and Entrada recordings, the destination folder structure allows for **three levels of hierarchy:**

- Department Folders
  - Department Sub-Folders
    - Department Sub-Sub-Folders

If you do not see the destination folder that exists in Entrada or Panopto—or, if you would like to request the creation of a new folder for one of these three levels— please reach out to fom.resourcecoordination@ubc.ca.

| RECORDING |
|---|
| Do you want the session recorded? <br> Yes |

| Recording Delivery <br> Upload to Panopto my folder or a Pano | Department Folders <br> Digital Solutions | Department Sub-Folders <br> Collaboration | Department Sub-Sub-Folders <br> Training |
|---|---|---|---|

If you do not see your folder in the lists provided, either request a folder using the Panopto Service Portal (https://ubc.ca1.qualtrics.com/jfe/form/SV_1G3uWpizq9lgvR4) or email fom.resourcecoordination@ubc.ca for assistance.