

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.

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CWL Authentication

Login to continue to [Faculty of Medicine APEX - PROD](#)

Login Name
yourCWL

Password
.....|

Login

Recover your CWL login or Reset your CWL password via Email

If you have a non-UBC email address associated with your CWL account you can either:

- ✓ [Recover your CWL Login Name](#)
- ✓ [Reset your CWL Password](#)

Protect Your CWL account!

- ✓ Watch out for sites or emails that [pretend to be legitimate](#) and ask for your CWL login name and password.
- ✓ Please [report any suspicious requests](#) for your CWL login name and password.
- ✓ [Learn more](#) about how to protect your devices.

[Learn about the CWL Terms of Use »](#)

Create a New Reservation

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

The screenshot displays the 'Advance Booking Manager' interface. On the left sidebar, the 'Advance Booking Form' option is highlighted with a red box. The main content area features a search bar, a 'Go' button, and a 'Submitted For' filter. A central card displays details for a 'FoM Digital Solutions Meeting' on 1/4/2023 from 0900 to 1030, with a status of 'Submitted for Approval: No' and buttons for 'Edit/View' and 'Share Request'. On the right, the 'Create A New Reservation' button is highlighted with a red box, alongside 'View as Grid' and 'Reset' options.

Reservation Request Form

Example of the reservation request form interface:

The screenshot shows the 'Advance Booking Form' interface. At the top left is the 'ABM' logo. The top right contains 'Install App' and a user profile 'jingj87'. A left sidebar lists 'My Requests', 'Advance Booking Form', 'Help', and 'Administration'. The main content area has a title 'Advance Booking Form' and four buttons: 'Cancel', 'Save draft and stay on this page', 'Save draft and return to 'My Requests'', and 'Submit Advance Booking Request'. Below the buttons are several input fields: 'Unique Advanced Booking ID' (1444), 'Your First and Last Name' (Jing Jing), 'Your Email Address' (jing.jing@ubc.ca), 'Your phone number' (604-561-9417), 'Who is this being submitted for?' (Hans Solo), and 'Submitted For Email' (Hsolo@MFalconSalvage.com). There are also 'Session Title' (Kessel Run Planning Meeting) and a 'ROUND SELECTION' section with radio buttons for 'Round 1' and 'Round 2'. The 'Round 2' section is selected and contains two columns of text describing eligible activities.

ABM

Install App jingj87

My Requests

Advance Booking Form

Help

Administration

Advance Booking Form

Cancel Save draft and stay on this page Save draft and return to 'My Requests' Submit Advance Booking Request

Unique Advanced Booking ID
1444

Your First and Last Name:
Jing Jing

Your Email Address:
jing.jing@ubc.ca

Your phone number:
604-561-9417

Who is this being submitted for?
Hans Solo

Submitted For Email
Hsolo@MFalconSalvage.com

If you are submitting on behalf of somebody else, please enter their first and last name here.

If you are submitting on behalf of somebody else, please enter their email here.

Session Title
Kessel Run Planning Meeting

ROUND SELECTION

Select either Round 1 or Round 2:

Round 1: Round 2:

UBC Faculty of Medicine teaching and learning activities with pedagogical approaches or accreditation requirements for in-person participation. This includes:

- FoM Undergraduate Curriculum
- Graduate programs
- Health professions programs
- Postgraduate training
- FoM Continuing Professional Education and faculty development
- Public education initiatives
- Activities that support the FoM governance committee structure or External Councils and have a requirement to take place in person

For more examples please refer to the [FoM Academic Learning Space Booking and Utilization Policy](#).

All other UBC Faculty of Medicine activities in support of:

- Education
- Research
- Organization program planning and business operations in Departments & Divisions
- Schools and Research Institutes & Centers.
- Administrative Service Units Examples are: meetings, workshops, training sessions, conferences, and events

Health authority activities

Other University-based health sciences education (UBC, UVIC, UNBC, UBCO) not covered in First Priority. Examples: Pharmacy, Dentistry, Nursing

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.

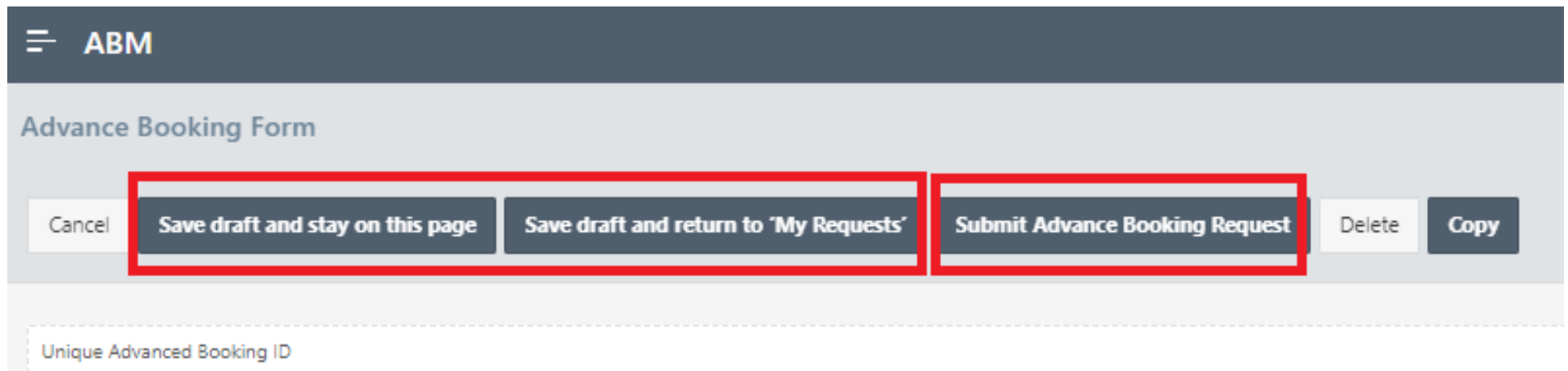
“Save Draft and stay on this page”

- 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.



The screenshot shows the 'Advance Booking Form' interface. At the top left, there is a hamburger menu icon and the text 'ABM'. Below this, the title 'Advance Booking Form' is displayed. A row of buttons is visible: 'Cancel', 'Save draft and stay on this page', 'Save draft and return to 'My Requests'', 'Submit Advance Booking Request', 'Delete', and 'Copy'. The buttons 'Save draft and stay on this page', 'Save draft and return to 'My Requests'', and 'Submit Advance Booking Request' are highlighted with red rectangular boxes. Below the buttons, there is a dashed line and the text 'Unique Advanced Booking ID'.

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.

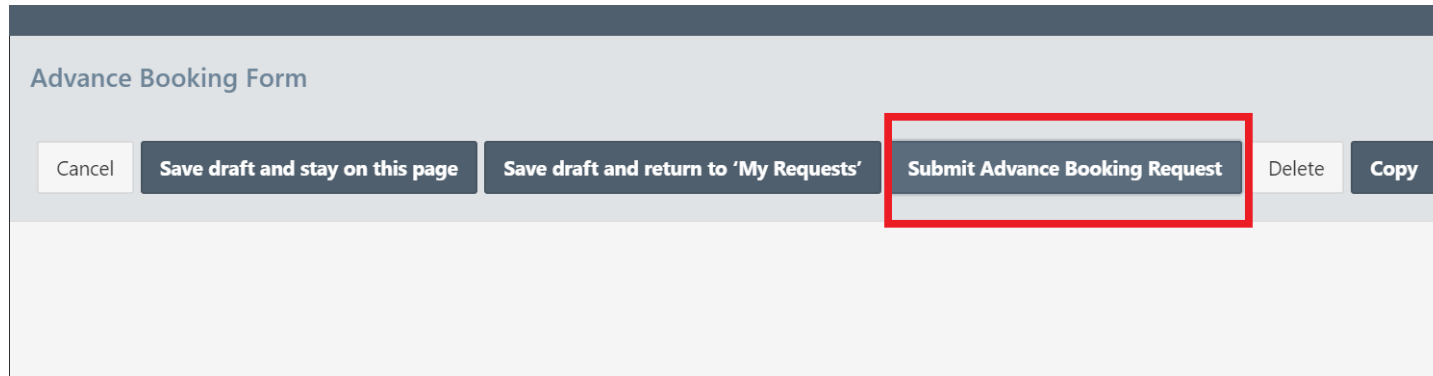
The screenshot displays the 'Advance Booking Manager' interface. At the top left, there is a navigation menu with 'ABM' and a hamburger icon. Below this is a search bar with a magnifying glass icon, a 'Search...' placeholder, and a 'Go' button. To the right of the search bar is a 'Create A New' button. The main content area features a list of booking cards. The first card is titled 'FoM Digital Solutions Meeting' with a yellow edit icon, the date '1/4/2023 0900 to 1030', and the status 'Submitted for Approval: No'. Below the status, there are two buttons: 'Edit/View' (highlighted with a red border) and 'Share Request'. On the left side of the interface, there are filter options: 'Submitted For' (checked), 'Submitted For Approval' (checked), and 'No (1)' (unchecked). Each filter option has a corresponding bar chart icon.

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.

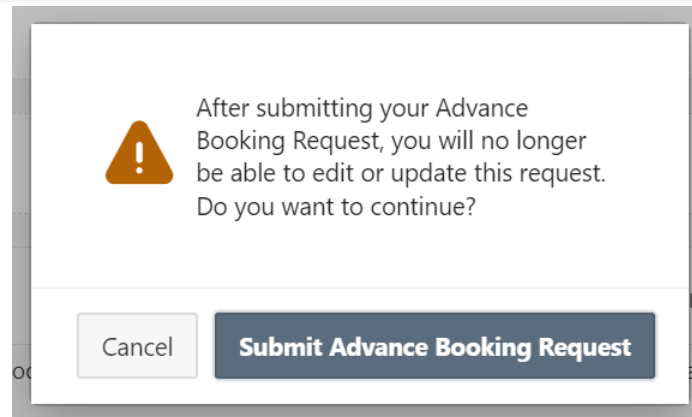
From the Advance Booking form, click “Submit Advance Booking Request” to submit your completed booking. You will be prompted with a warning message about committing to the submission.


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



Advance Booking Form

Cancel Save draft and stay on this page Save draft and return to 'My Requests' **Submit Advance Booking Request** Delete Copy



 After submitting your Advance Booking Request, you will no longer be able to edit or update this request. Do you want to continue?

Cancel Submit Advance Booking Request


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

 fom.resourcecoordination@ubc.ca     

10:10 AM

Hello,

Your booking request (ID 6081) cannot be completed for the following reason(s):

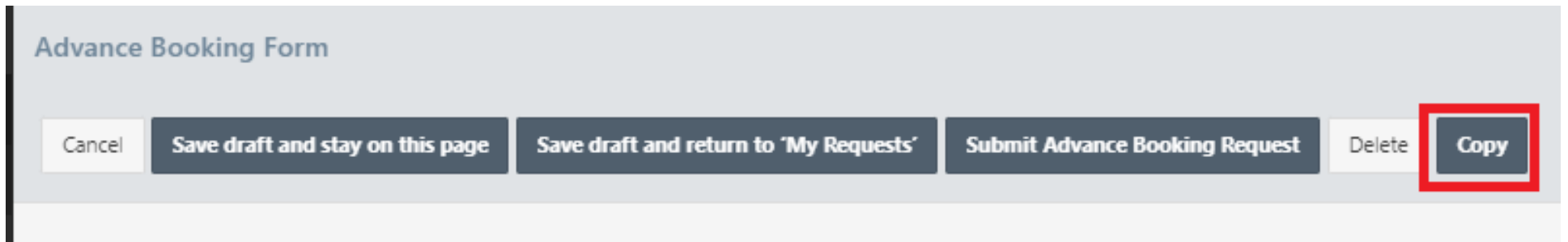
Ineligible for Advance Booking. Please submit request during General Booking.

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.



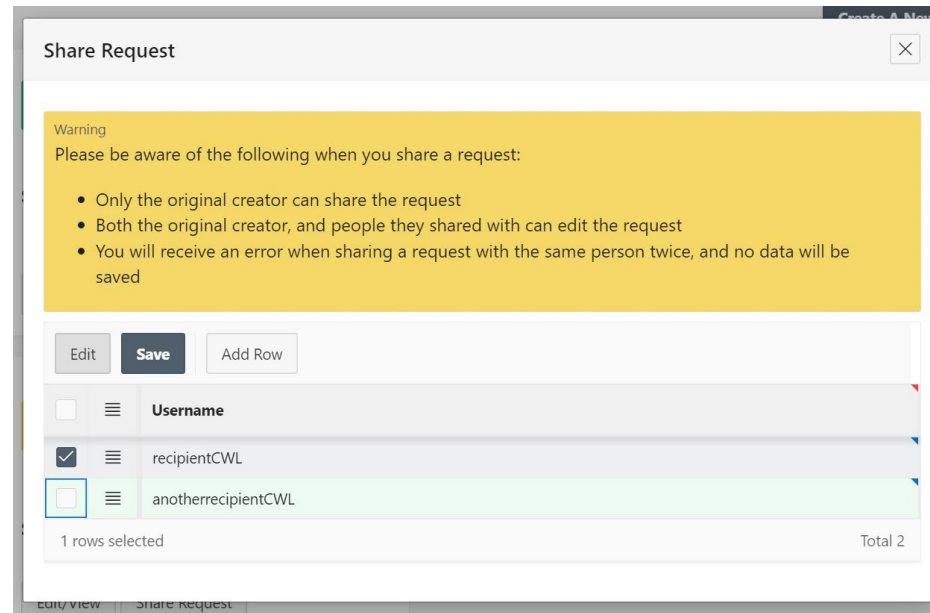
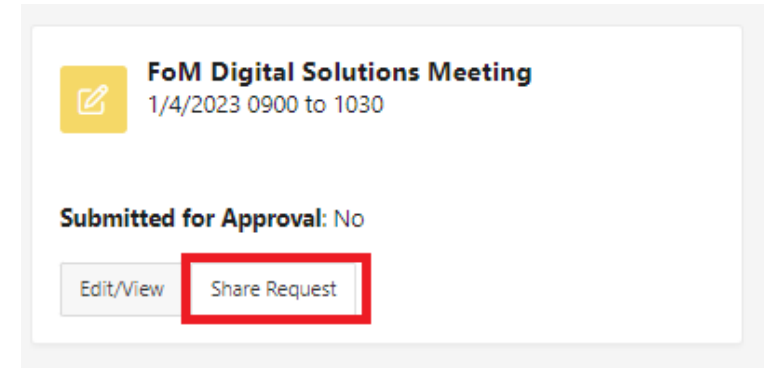
The image shows a horizontal bar with the title "Advance Booking Form" on the left. Below the title is a row of six buttons: "Cancel", "Save draft and stay on this page", "Save draft and return to 'My Requests'", "Submit Advance Booking Request", "Delete", and "Copy". The "Copy" button is highlighted with a red square border.

Sharing a Booking

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

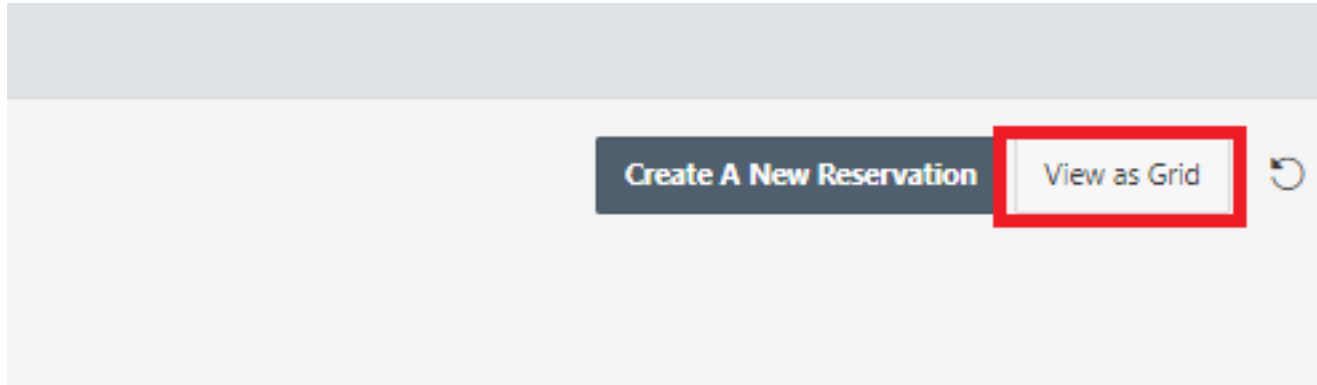
Only the original creator can share a booking. Once shared, the new user is able to edit the same booking.


- 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.



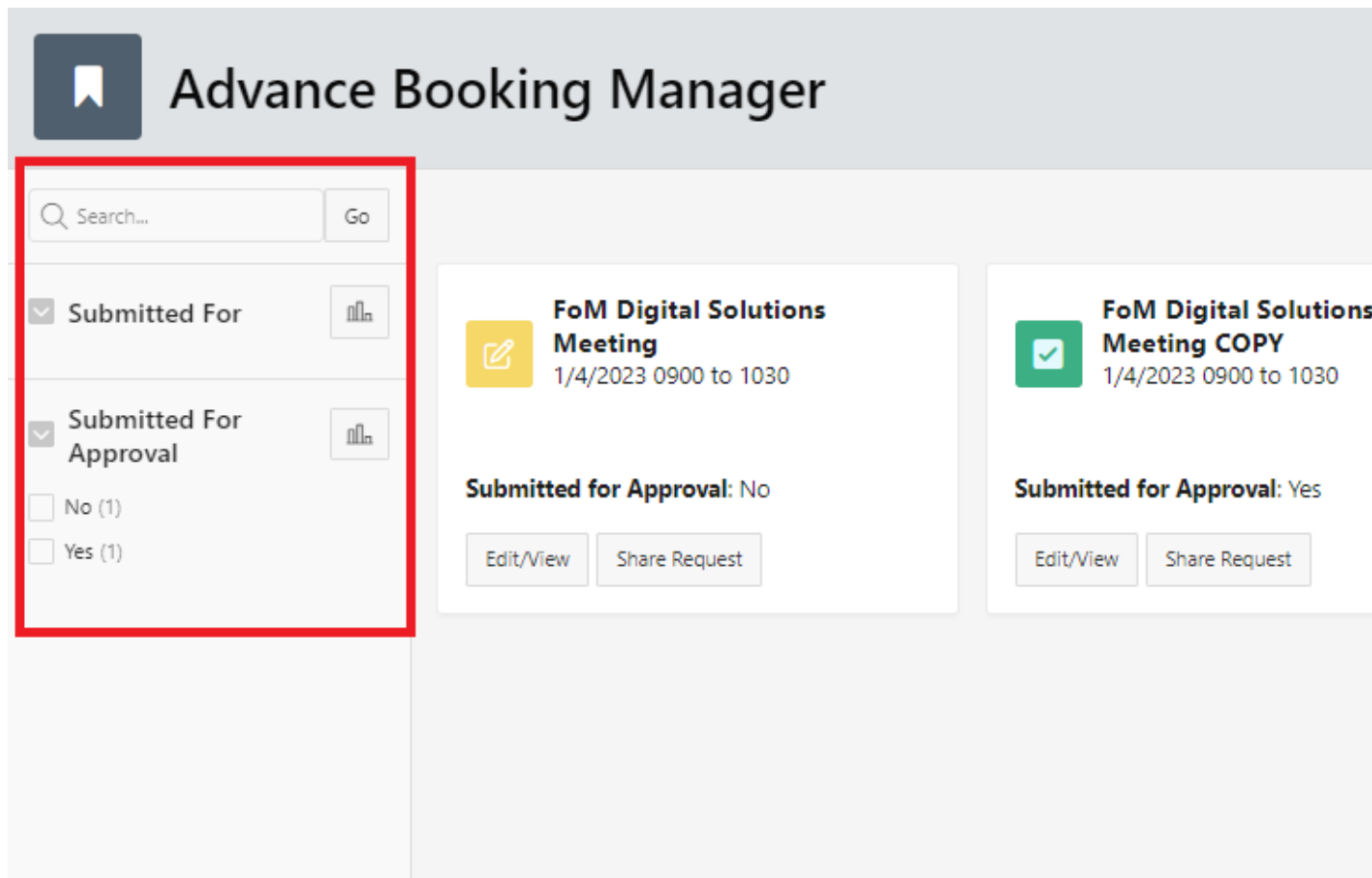
 **Advance Booking Management System** Create A New Reser

Search: All Text Columns Actions ▾

<input type="checkbox"/>	Edit/View Reservation	Status	Event Title	Submitted For	Start Date	End Date	Start Time	End Time	Email	Organization	Association Fom Admin	Association Fom Type	Event Type
<input checked="" type="checkbox"/>	Edit/View		FoM Digital Solutions...		1/4/2023		9:00AM	10:30AM	alex.kennedy@ubc.ca	UBCFOM	IT (Digital Solutions)	admin_support	Meeting
<input type="checkbox"/>	Edit/View		FoM Digital Solutions...		1/4/2023		9:00AM	10:30AM	alex.kennedy@ubc.ca	UBCFOM	IT (Digital Solutions)	admin_support	Meeting

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.



The screenshot displays the 'Advance Booking Manager' interface. On the left side, there is a search bar with a magnifying glass icon and the text 'Search...', followed by a 'Go' button. Below the search bar are two filter sections, both with a dropdown arrow and a bar chart icon. The first filter is 'Submitted For' and the second is 'Submitted For Approval'. Under 'Submitted For Approval', there are two checkboxes: 'No (1)' and 'Yes (1)'. The main content area on the right shows two booking cards. The first card is titled 'FoM Digital Solutions Meeting' with a yellow pencil icon and the date '1/4/2023 0900 to 1030'. Below the title, it says 'Submitted for Approval: No' and has 'Edit/View' and 'Share Request' buttons. The second card is titled 'FoM Digital Solutions Meeting COPY' with a green checkmark icon and the same date. Below the title, it says 'Submitted for Approval: Yes' and has 'Edit/View' and 'Share Request' buttons. A red rectangle highlights the search bar and filter sections on the left.

Recording Folders

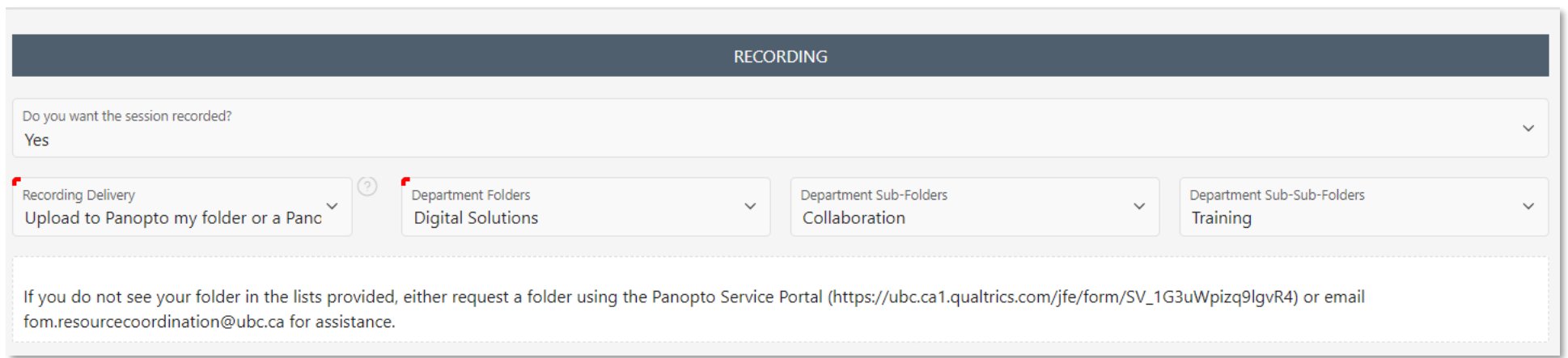
Recording Folders are used for storing recordings via the Panopto or Entrada platform. Alternatively, you may choose to have the recording emailed to you as a stream-able, downloadable weblink.

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
 - o 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?
Yes

Recording Delivery
Upload to Panopto my folder or a Panc

Department Folders
Digital Solutions

Department Sub-Folders
Collaboration

Department Sub-Sub-Folders
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.