

The Associated

# Resource Scheduler User Guide

---

Resource Scheduler version 11.5

## Contents

Overview .....	3
Logging into Resource Scheduler .....	3
Creating Reservations.....	3
Using the Reservation Wizard: .....	3
Using Daily Planner View .....	<b>Error! Bookmark not defined.</b>
Using Quick Reserve .....	3
Editing a Reservation .....	6
To modify a reservation: .....	7
To copy a reservation: .....	7
To delete a reservation: .....	8
Making a Reservation Recurring .....	9
Managing Conflicts: .....	10
Requesting Catering and Equipment .....	13
Adding More Information to a Reservation .....	21
Flagging a Reservation for Follow Up .....	21
On Behalf Of: .....	22
Adding Resources .....	23
Other Features .....	24
My Favorites .....	24
To remove a room from the list, follow the same process and click the star again, turning it white. ....	25
Search Reservations .....	25
Display Resource Availability .....	25
Reports .....	25
Approval Process .....	26
Setting Personal Defaults.....	27



## Overview

Resource Scheduler is a web-based single source system used to reserve rooms, catering, and equipment.

## Logging into Resource Scheduler

This is the link to Resource Scheduler: <https://jcfb.resourcescheduler.net/resourcescheduler> or by going to [apps.associated.org](https://apps.associated.org)

Clicking on this link will launch your sign in page (please use network username and password) and 2-factor as required.

Notes:

- *Pop-ups must be allowed in the browser for the Resource Scheduler site.*
- *Please use the links and buttons on pages to move between pages rather than using the browser "back" button.*
- *For best results, set Internet Explorer to check for newer versions of stored pages "every time I visit the webpage".*
- *We don't have license limitations- feel free to remain logged in all day.*

## Creating Reservations

**Please remember that we need at least 24 hours advance notice for meetings that require setup.**

### Using the Reservation Wizard:

**Reservation Wizard** searches for available rooms based on several filters. When choosing a recurring pattern for a meeting, the results show only those 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.

### Using Quick Reserve

Use **Quick Reserve** to create a reservation from the **Schedule View**. This method is especially easy when you know what space you want to reserve. Clicking on a group folder 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.

ASURE SOFTWARE | Resource Scheduler

HOME RESERVATION WIZARD PLANNER APPROVALS VISITORS REPORTS QUICK LINK

Company Tree

- Company Offices
  - CA - San Francisco
  - NY - New York City
    - 10th Floor
      - Room 1012
      - Room 1015
      - Room 1022
      - Room 1027
    - 11th Floor
    - SA - Johannesburg
    - UK - London

My Favorites

Room 1015

My Reservations

Test e-mail requested for \*  
Apr 27, 2017 1:00 PM - 2:00 PM

To change dates for the **Schedule View**, tabs at the top provide **Day, Week, Month and Timeline** views which can be scrolled by using the arrows. Click the date(s) to open a date-picker calendar.

ASURE SOFTWARE | Resource Scheduler | Hello Nancy Miller | Help

HOME RESERVATION WIZARD PLANNER APPROVALS VISITORS REPORTS QUICK LINKS

Company Tree

- Company Offices
  - CA - San Francisco
  - NY - New York City
    - 10th Floor
      - Room 1012
      - Room 1015
      - Room 1022
      - Room 1027
    - 11th Floor
    - SA - Johannesburg
    - UK - London

10th Floor  
US - New York (Eastern)

Today Sunday, April 23, 2017 - Saturday, April 29, 2017

Day Week Month Timeline Timeline Week

	Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28	Sat 29
Room 1012 (10)						Meeting with Catering (9:00am - 11:00am)	
Room 1015 (12)					* Test e-mail requested for (1:00pm - 2:00pm)	Meeting (9:00am - 11:00am)	
Room 1022 (12)							
Room 1027 (24)							

- 1 When viewing the schedule, click on an open block of time. This will open the **Quick Reserve** window.
- 2 Enter the **Reservation Title, # Of Attendees, Setup** (if available), **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. Select the correct user. Since the system already recognizes you as the creator of the reservation, it will not

display your user profile in the choices.

Quick Reserve ✕

Reservation Title	<input type="text"/>
# Of Attendees	<input type="text" value="0"/>
Color	<input type="text" value="Standard Meeting"/>
Resource	<input type="text" value="Room 1015"/>
Meeting Has Visitors	<input type="checkbox"/>
Setup Style	<input type="text" value="Rectangle Table(12)"/>
Start Date/Time	<input type="text" value="May 1, 2017"/> <input type="text" value="Select"/> <input type="text" value="00"/>
End Time	<input type="text" value="Select"/> <input type="text" value="00"/>
Requested For	<input type="text"/>

[MORE...](#)

- 3 Click **Submit** to complete the reservation. Click **More** to open the details page to add any other information such as catering or AV requests.

- 4 Add additional details as needed. See the [Using the Reservation Wizard](#) and [Adding More Information to a Reservation](#) sections for more information.
- 5 When finished entering details, click **Save**, which will return you to the Calendar View.

## Booking a Combo Room (Assoc-Boardroom A/B/C)

1. Navigate on the tree to the Combo Room.

- 2.

## 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.

## To modify a reservation:

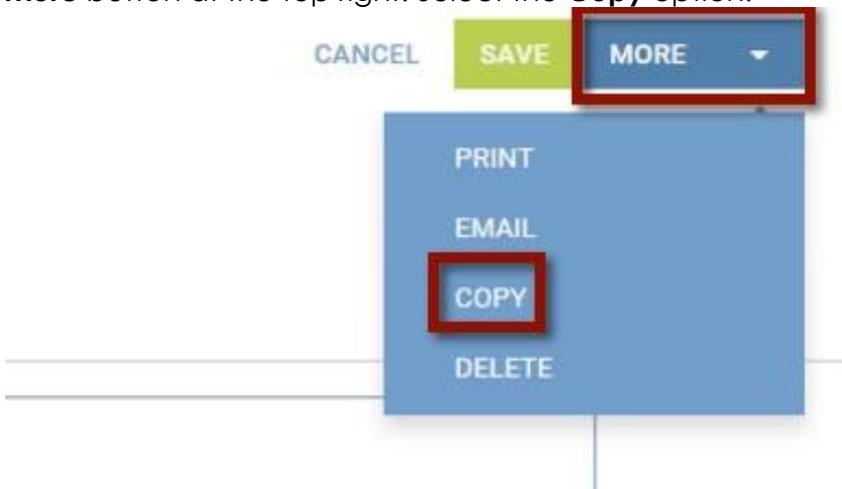
NOTE: Only reservations created through the web client should be edited in the web client. Outlook reservations should be managed in the Outlook calendar where they were created.

- 1 Click on the link to the reservation you are interested in.
- 2 In the Reservation Details page, make necessary changes to the reservation. The meeting host and any attendees will be notified of the change.
- 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 [Managing Conflicts](#) section for details.
- 4 Click **Save**.

## To copy a reservation:

NOTE: Recurring reservations and reservations that were created through the Outlook interface cannot be copied.

- 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.



- 2 Depending on the reservation, you will be given options of other details to copy, including Attendees, Services, etc.
- 3 Click **Copy** at the bottom left.

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

**COPY**    CANCEL

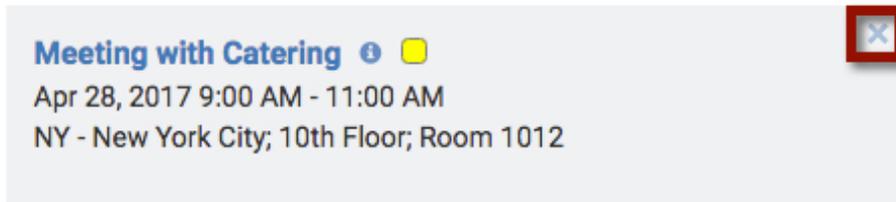
- 4 Resolve any conflicts that occur. See the [Managing Conflicts](#) section for details.

## To delete a reservation:

There are two ways of cancelling a reservation:

### From My Reservations:

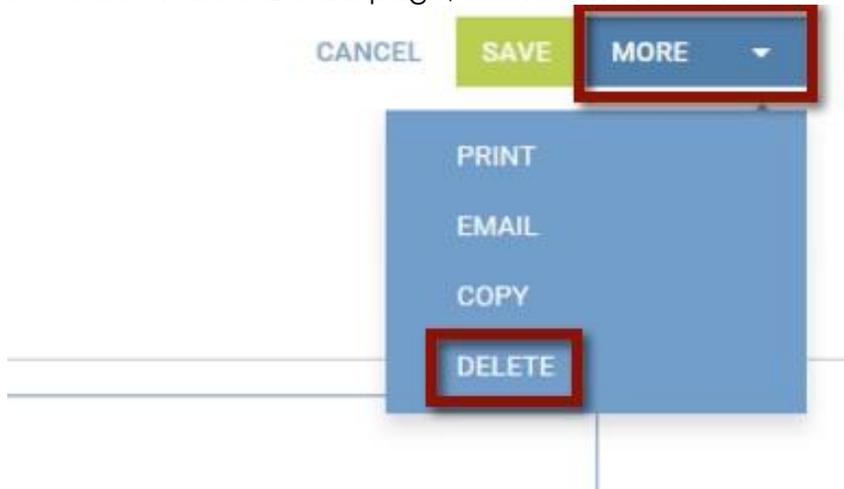
- 1 CHANGED: Click on the **X** at the top right of the box for the reservation you wish to cancel.



- 2 Click **OK** to confirm.

### From within the Reservation Details page:

- 1 Click on the link to the reservation you are interested in cancelling.
- 2 In the Reservation Details page, click the **More** button. Select the **Delete** option.



- 3 Click **OK** to confirm.

## Making a Reservation Recurring

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



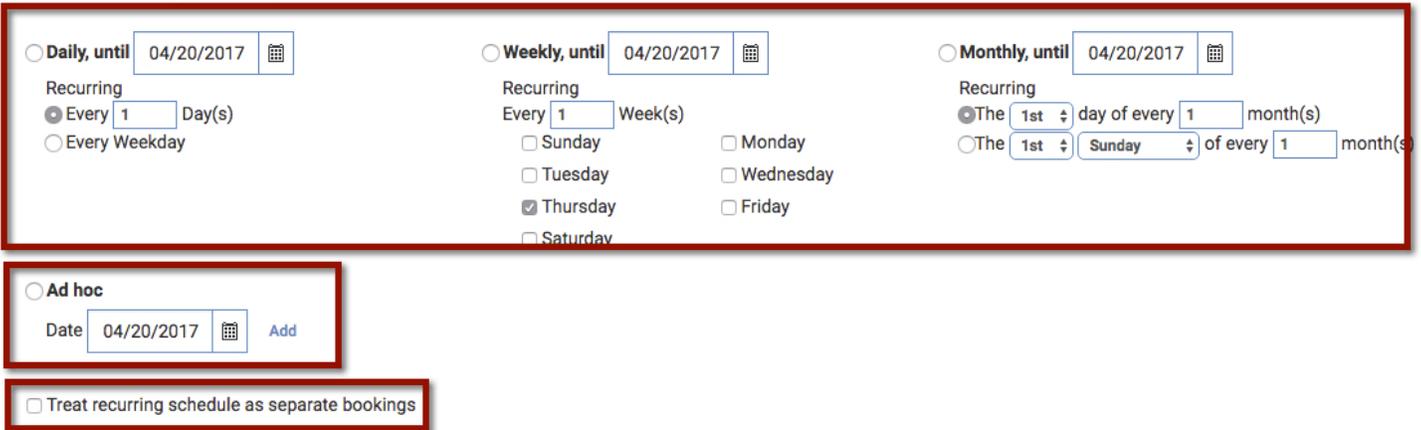
Meeting 1 ID: -1996990102 US - New Jersey (Eastern)

01/25/2017 10:00 AM To 01:00 PM  Repeat...

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 – no room is reserved for those dates.*

## Recurring

Test e-mail requested for | Apr 20, 2017 1:00 PM - Apr 20, 2017 2:00 PM | US - New York (Eastern)  
NY - New York City; 10th Floor; Room 1015



Daily, until 04/20/2017

Recurring

Every 1 Day(s)

Every Weekday

Weekly, until 04/20/2017

Recurring

Every 1 Week(s)

Sunday  Monday

Tuesday  Wednesday

Thursday  Friday

Saturday

Monthly, until 04/20/2017

Recurring

The 1st day of every 1 month(s)

The 1st Sunday of every 1 month(s)

Ad hoc

Date 04/20/2017 Add

Treat recurring schedule as separate bookings

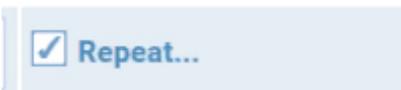
SUBMIT

RETURN

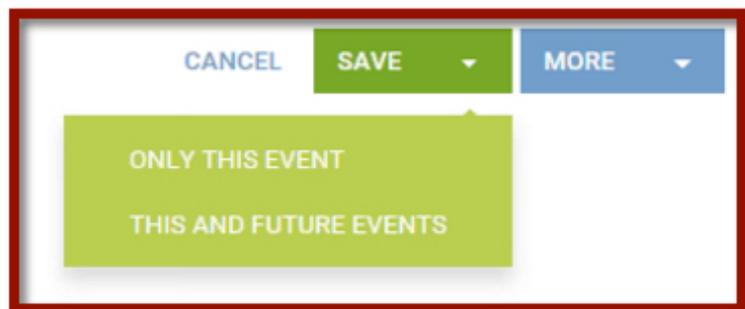
NOTE: It is recommended to *not* use the checkbox for “treat as separate bookings”. This will create each instance as a separate reservation, and will require each to be edited separately rather than as a series.

When managing recurring reservations, there will be an option to make a change to a single instance or that instance and all future.

ersey (Eastern)



Repeat...

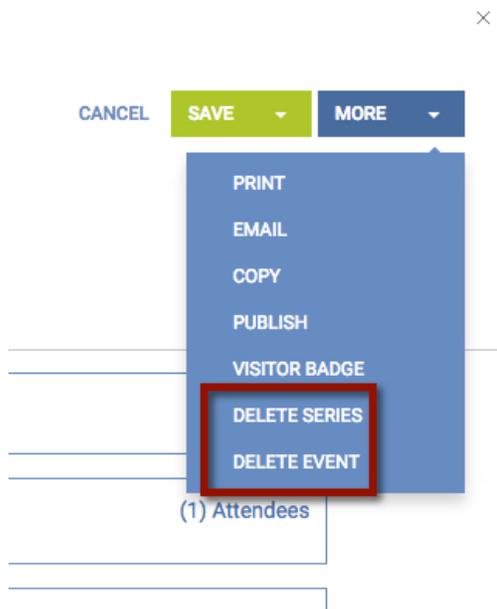


CANCEL SAVE MORE

ONLY THIS EVENT

THIS AND FUTURE EVENTS

The same applies to canceling reservations. There will be an option to delete the single event or the rest of the series.



## Managing Conflicts:

- 1 If a room is unavailable for one of the days in your recurring pattern, you will be prompted to resolve the conflict.



- 2 Icons indicate the status of a specific instance.
  - a. Checkmark ✓ = room reserved
  - b. Flag 🚩 = changed reservation, room reserved
  - c. Red exclamation ⚠ = conflict

- 3 Reservations with a conflict are marked in red. Each conflict should be resolved independently.

## 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

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)

- 4 Select the instance which is unavailable, and click on the meeting date.

- 5 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)

- 6 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**.

- 7 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

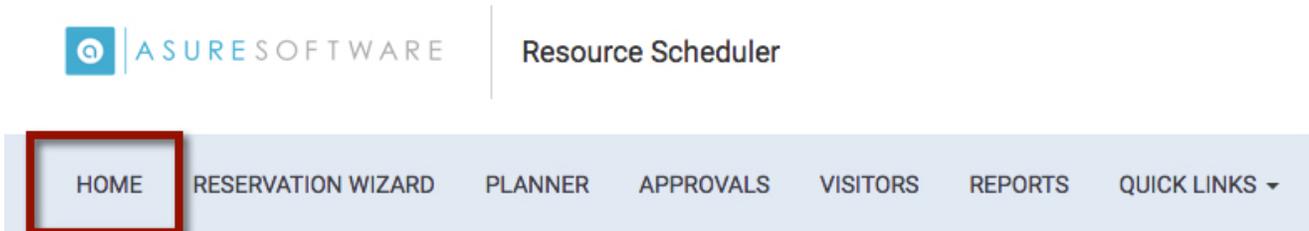
Jets (12)

Rectangle Table (12)

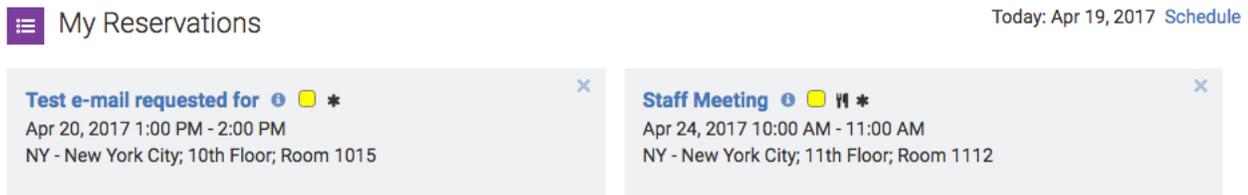
8 Click **Save** to save your change. Choose **Only This Event**.



9 Resolve remaining conflicts in a similar manner. To determine whether there are unresolved conflicts, click the **Home** button in the ribbon.



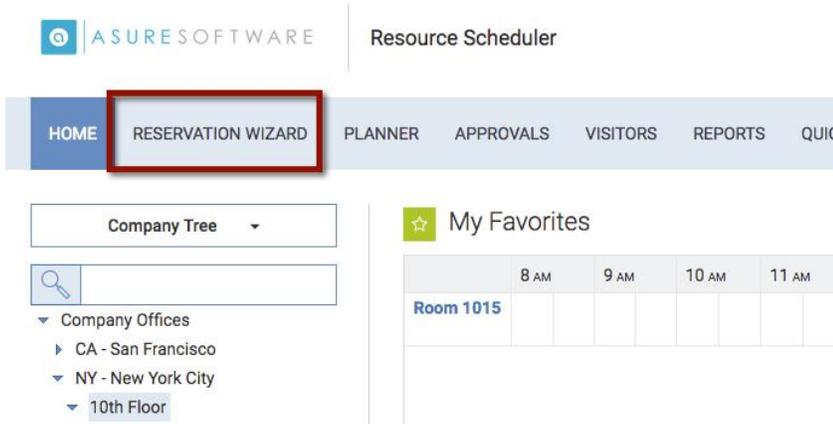
10 Under the **My Reservations** section, click the **More...** link.



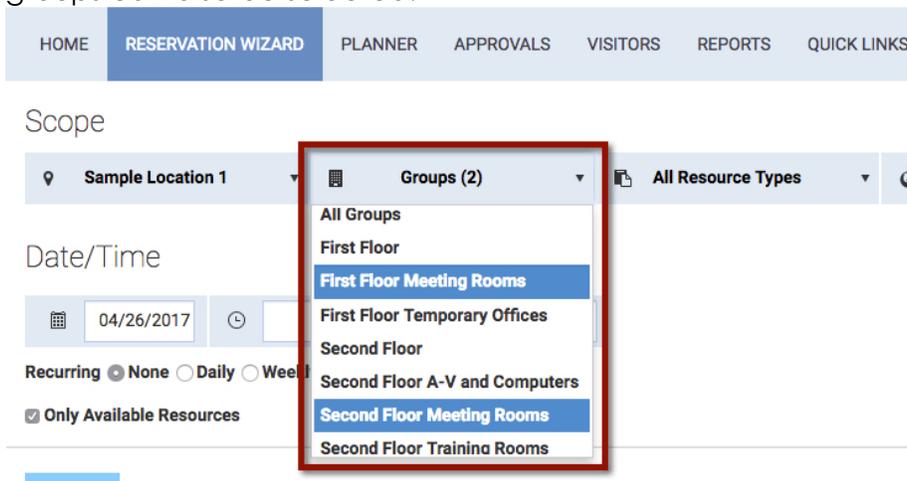
11 Check the box for **Conflicts Only**. If a conflict appears in the list, click on it and resolve using the steps above. Once all conflicts are resolved, the message “**No items were found for that selection...**” will appear.



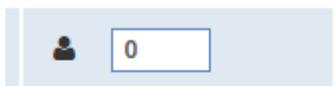
- 12 Click **Reservation Wizard** in the **Toolbar** or the **Quick Links** drop-down to be guided through a step-by-step process.



- 13 Use the wizard to set the criteria for the search.
- 14 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.
- 15 If a single location is selected, one or more groups can be selected in the next column. Specific groups can also be selected.



- 16 There may be an option to select the **Timezone for Reservation**.
- 17 Use the **Resource Type** to choose one or more types of spaces for the search. Select All for all types.
- 18 Enter **Capacity** to find a room large enough for the meeting, if appropriate.



19 If specific amenities are needed, use the **Filter** to select them.

UDF Type	Filter On	Resource Characteristic	Value	Text Search Type
	<input type="checkbox"/>	Built-in Computer	<input type="text"/>	
	<input type="checkbox"/>	Display Type	<input type="text"/>	
	<input type="checkbox"/>	Phone Type	<input type="text"/>	
	<input type="checkbox"/>	Whiteboard	<input type="text"/>	

If selecting more than one value, select items that meet  criteria

20 Specify the **Date**, **Start** and **End** times.

Date/Time

to

21 To only show 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.

22 Click on **Next** to return the results that match your criteria.

23 Your meeting time will be highlighted in the results grid. Other meetings appear as colored blocks.

ASURE SOFTWARE | Resource Scheduler

HOME | RESERVATION WIZARD | PLANNER | APPROVALS | VISITORS | REPORTS | QUICK LINKS -

Search Results

Reservation Name     Private  Meeting Has Visitors

-- Company Offices: NY - New York City --

Friday, April 28, 2017 (US - New York (Eastern))

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM
<input type="checkbox"/> 10th Floor: Room 1027 (24) <input type="text" value="Select"/>									
<input type="checkbox"/> 10th Floor: Room 1012 (10) <input type="text" value="Rectangle Table (10)"/>									
<input type="checkbox"/> 10th Floor: Room 1022 (12) <input type="text" value="Rectangle Table (12)"/>									
<input type="checkbox"/> 11th Floor: Rooms 1112 & 1115 (75)									
<input type="checkbox"/> 11th Floor: Room 1112 (10) <input type="text" value="Rectangle Table (10)"/>									
<input type="checkbox"/> 11th Floor: Room 1115 (12) <input type="text" value="Rectangle Table (12)"/>									

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

## Room 1012

Description	Room 1012
Location	NY - New York City:10th Floor
Resource Type	Video Conference Room
Contact Info	
Capacity	10
Reservations require approval	No
Additional Information	
Time Fence	6 Months Rolling (Apply Limit to non-Recurring Schedules) (Location Level)
Options	
Phone Type	Standard
Built-in Computer	Yes
Display Type	Digital Display (TV)
Whiteboard	Yes

[CLOSE](#)

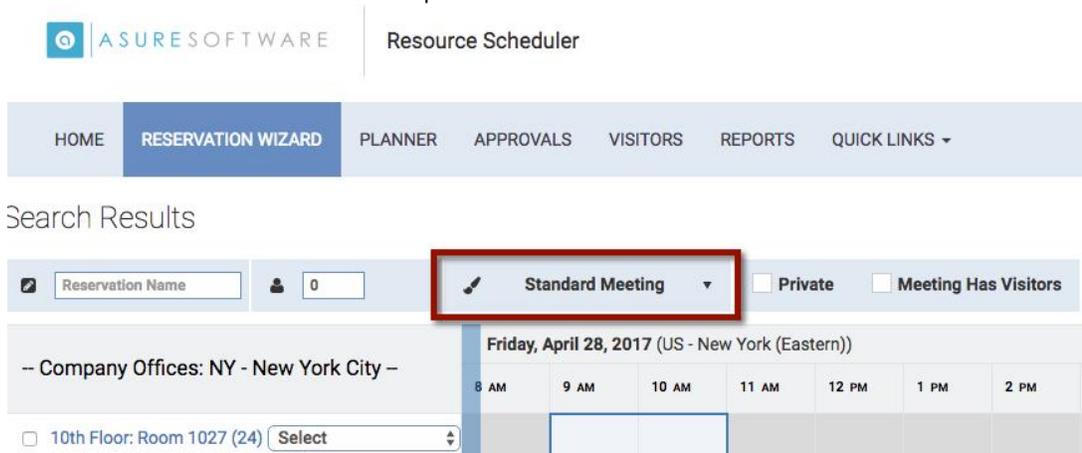
25 Numbers in parentheses indicate the max capacity for the room.

26 A room with a  requires approval. A response will be provided within 24 hours. Reservations created by Scheduling Administrators are pre-approved.

27 View meeting details by *hovering* your cursor over other events.

28 Type the **Reservation Name** in the field provided.

29 Select the **Status** from the drop-down menu.



The screenshot shows the 'Resource Scheduler' interface. At the top, there is a navigation bar with 'HOME', 'RESERVATION WIZARD' (highlighted), 'PLANNER', 'APPROVALS', 'VISITORS', 'REPORTS', and 'QUICK LINKS'. Below the navigation bar, the 'Search Results' section is visible. It includes a search bar for 'Reservation Name', a user selection dropdown showing '0', and a status dropdown menu set to 'Standard Meeting'. There are also checkboxes for 'Private' and 'Meeting Has Visitors'. The main content area shows a calendar view for 'Friday, April 28, 2017 (US - New York (Eastern))'. The calendar grid has columns for 8 AM, 9 AM, 10 AM, 11 AM, 12 PM, 1 PM, and 2 PM. A dropdown menu is open for '10th Floor: Room 1027 (24)' with a 'Select' button.

30 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.

31 Click **Edit** to complete the required fields, add services or include other details. The Reservation Details page will open. Click **Finished** if nothing needs to be added.

The screenshot displays a reservation details page for a meeting titled "Meeting with Catering". At the top, there are buttons for "CANCEL", "SAVE", and "MORE". Below this, the meeting date is set to 04/28/2017 from 09:00 AM to 11:00 AM. The "Options" tab is selected, and the "Host" field shows "Nancy Miller" with a "More..." link. The "Invite" section lists "Nancy Miller" as the sole attendee. The "Description" field is empty. Meeting settings include "Standard Meeting", 10 attendees, and checkboxes for "Private", "Flag for Follow-up", and "Meeting Has Visitors". Setup and cleanup times are both set to 0. At the bottom, there are buttons for "ADD RESOURCES" and "REMOVE ALL". A service selection area shows "Room 1012 (10)" with a "Rectangle Table (10)" selected, and an "ADD SERVICES" button.

32 To assign this meeting to another user as meeting host, use the **Host** section, clicking **More** to add details. See the [Adding More Information to a Reservation](#) section for more information.

33 Setup and cleanup times can be adjusted by Scheduling Administrators.

34 To add catering or other services, click the **Add Services** button. See the [Requesting Catering and Equipment](#) section for more details.

35 To e-mail information regarding this reservation, click **More** at the top right and choose the **Email** options.

36 Click the **Save** button at the top of the page when finished.

37 Back at the confirmation page, click **Finished** to be returned to Reservation Wizard to continue making reservations.

# Requesting IT Equipment at Park Heights or Owings Mills (JCC, JCS, CJE)

1. Enter your meeting details and click on More.
2. Use the Technology Needs Tab to select the IT Support you need.

HR Department Meeting ID: -1999956498 US - Maryland (Eastern) CANCEL SAVE MORE

04/25/2018 03:00 PM To 04:30 PM Repeat...

Details Options Technology Needs History

**\*Technology Needs\*** Please fill out form if you require Technology Support for your meeting. Please include any additional information in the Notes area. Please specify if a presenter is bringing a mac computer.

Projector Setup

Computer Support Needed

Blu-Ray Player

Video Conference Setup

Laptop Support Needed

Conference Phone

Other Support Needed

3. An email will be automatically sent to the helpdesk.
4. If you need to edit or cancel Technology Needs, double-click on your meeting, go to the Technology Needs tab and either check the box that says cancel Technology or edit your selections.

HR Department Meeting ID: -1999956498 US - Maryland (Eastern) CANCEL SAVE MORE

04/25/2018 03:00 PM To 04:30 PM Repeat...

Details Options Technology Needs History

Check to cancel Technology Needs request

**\*Technology Needs\*** Please fill out form if you require Technology Support for your meeting. Please include any additional information in the Notes area. Please specify if a presenter is bringing a mac computer.

Projector Setup

Computer Support Needed

Blu-Ray Player

Video Conference Setup

Laptop Support Needed

Conference Phone

Other Support Needed test

\*In order to check out the PH Video Conference Cart, you need to use services- this will only be available on rooms the cart can be used in.

Park Heights JCC - JCC **ADD SERVICES**

---

**Board Room (60) - Approved** X

**Conference (35)** Setup Time: 30 Cleanup Time: 30

Location Park Heights JCC

CANCEL

Service Type	Service Provider	Services	Available Times	Action
Group	Video Conference Unit	Video Conference Unit	12:00 AM - 11:30 PM	<b>ADD SERVICE +</b>

## Requesting Catering and Equipment at 101 (The Associated)

Catering, A/V and IT equipment can be requested alone or along with a room reservation. To be included with a room reservation, click the **Add Services** button in the Reservation Details page.

Standard Meeting # Of Attendees 10 Private  Flag for Follow-up  Meeting Has \

Setup Time 0 Cleanup Time 0

**ADD RESOURCES +**

REMOVE ALL

NY - New York City - 10th Floor **ADD SERVICES**

---

**Room 1012 (10)** X

Rectangle Table (10)

- 1 Select the **Add Service** button for the needed service. The options will vary by location. If multiple rooms are reserved, confirm that the correct location is selected.

Location 101 Mt Royal Ave

CANCEL

Service Type	Service Provider	Services	Available Times	Action
Catering	Catering	Catering	5:00 AM - 10:00 PM	<b>ADD SERVICE +</b>
Equipment	IT Support	Equipment	12:00 AM - 11:30 PM	<b>ADD SERVICE +</b>

- 2 The meeting title, date, times and location are automatically filled out if the request is part of a room reservation. The times can be adjusted if they should be different than the reservation (common for all-day meetings with catering needs). If multiple rooms have been reserved, confirm that the correct room is reflected in the **Delivery Location** field.



CANCEL **NEXT**

Catering - Catering

Order Description:

This order will be:

Delivery Location:

Delivery or Start Date & Time:   ⚠ US-MD time zone

End Date & Time:

Appetizers	Price	Quantity
Appetizers		<input type="text" value="0"/>
Snacks		<input type="text" value="0"/>

Beverages	Price	Quantity
Coffee		<input type="text" value="0"/>
Soda		<input type="text" value="0"/>
Tea		<input type="text" value="0"/>
Water		<input type="text" value="0"/>

Entrees	Price	Quantity
Breakfast		<input type="text" value="0"/>
Dinner		<input type="text" value="0"/>
Lunch		<input type="text" value="0"/>

Pastries	Price	Quantity
Dessert		<input type="text" value="0"/>

- 3
- 4 Type the number needed for each desired item in the field next to its name.
- 5 Click **Next**.
- 6 Fill out the **Billing Information** if this should be charged to a certain account.

Order Information		Billing Information		<input type="checkbox"/> Use Order Info	<b>FIND</b>
Ordered Date	4/26/2017	Contact	<input type="text" value="Nancy Miller"/>		
Contact	Nancy Miller	E-mail	<input type="text" value="nmiller@asuresoftware.com"/>		
E-mail	<a href="mailto:nmiller@asuresoftware.com">nmiller@asuresoftware.com</a>	Phone	<input type="text"/>		
Department	<input type="text" value="Professional Services"/>	Department	<input type="text" value="Professional Services"/>		
Account Code	<input type="text" value="55-5555"/>	Account Code	<input type="text" value="55-5555"/>		

7 Enter information for a specific item by clicking on the **Pencil** icon next to the item.

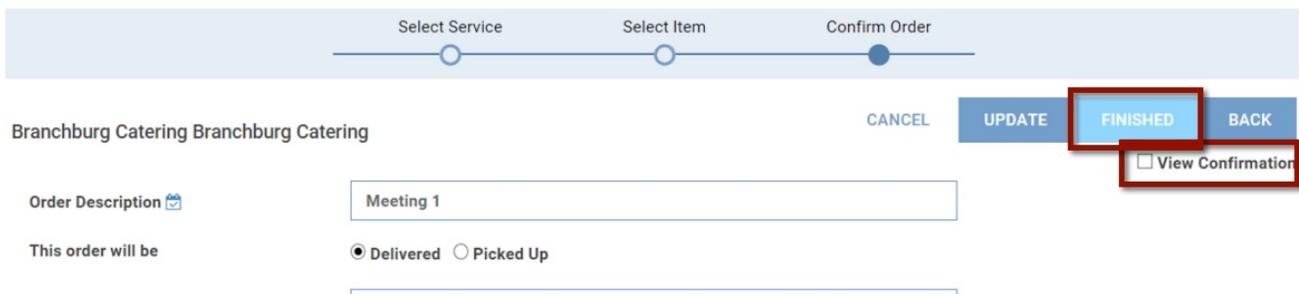
Order Management

Status New Order Phase **Not Submitted**

Qty	Description	Item Options	Item Notes	Price Each	Total
<b>NYC Catering Menu</b>					<a href="#">EDIT</a>
10	Assorted Sodas	- None -	Caffeine-free 	\$1.50	\$15.00
10	Coffee Break	- None -	- None - 	\$2.50	\$25.00
10	Bag Lunch	<b>Bagged Lunch Sandwich Choices</b> Turkey and Cheddar, Vegetarian	- None - 	\$12.00	\$120.00

**Order Subtotal** \$160.00  
**Sales Tax** \$12.80  
**ORDER TOTAL** \$172.80

8 Click **Finished** when done. Check the **View Confirmation** checkbox first if a printed confirmation is needed.



Progress bar: Select Service (0) - Select Item (0) - Confirm Order (100%)

Buttons: CANCEL, UPDATE, **FINISHED**, BACK

View Confirmation

Branchburg Catering Branchburg Catering

Order Description  Meeting 1

This order will be  Delivered  Picked Up

9 The order now appears in the Reservation Details page. Click the **Edit** button to make changes to this request. To create further requests, click the **Add Catering & Equipment** button again.

10 To add notes about your IT/Catering Order- use description field.

test ID: -1999945949 US - District of Columbia (Eastern) CANCEL SAVE MORE

04/25/2018 05:00 PM To 06:00 PM Repeat...

Details Options History

Host Carole Taylor  More...

Invite Carole Taylor (1) Attendees

**Description**

Staff Meeting # Of Attendees 4 Private  Flag for Follow-up

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

The Associated - Associated ADD SERVICES

Room 201 (33) - Approved

Hollow Square

## Offsite Associated Catering

Offsite food catering is booked by selecting the resource **Offsite Meetings- Associated**. You can either book this resource for the time and date that you need the food or click **Add Resource** when booking a meeting, be sure to Add Services to specify the food you need delivered or ready for pick up.

**Please title the meeting with the delivery location.**

Invite  (1) Attendee

Description

Staff Meeting # Of Attendees  Private  Flag for Follow-up

Setup Time  Cleanup Time

**ADD RESOURCES +** REMOVE ALL

The Associated - Associated **ADD SERVICES**

**Offsite Meetings- Food - Approved**

Room 201 (33) - Approved

Hollow Square

## Adding More Information to a Reservation

### 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**.

Details Options History

Host Nancy Miller [/](#) More...

Invite Nancy Miller

Description

Standard Meeting # Of Attendees 10 Private  Flag for Follow-up  Meeting

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

### On Behalf Of:

If you are creating this reservation on behalf of someone else, click the **More** link in the **Host** section of the Reservation Details page.

Details Options History

Host Nancy Miller [/](#) More...

Invite Nancy Miller

Description

Standard Meeting # Of Attendees 10 Private  Flag for Follow-up  Meeting

Setup Time 0 Cleanup Time 0

ADD RESOURCES + REMOVE ALL

Enter or select the meeting host, and if needed a third party who is requesting the meeting. If the host is a Resource Scheduler user, you can search for their information with one of the links. They will

receive email confirmations, reminders and notice of any changes if you keep the boxes checked.

## Request

Meeting with Catering | Apr 28, 2017 9:00 AM - Apr 28, 2017 11:00 AM | US - New York (Eastern)  
NY - New York City, 10th Floor, Room 1012

User List  
Address Books

Requested For

Name

Email

Phone

Account Code:

Send Email Notices

Requested By

Name

Email

Phone

Send Email Notices

## Adding Resources

Add additional rooms by clicking the **Add Resources** button. Click **Show**. Only available resources will be shown. **This can be used to add "Offsite Food" to a reservation.**

Details Options History

Host  More...

Invite

Description

Standard Meeting # Of Attendees  Private  Flag for Follow-up  Meeting

Setup Time  Cleanup Time

REMOVE ALL

NY - New York City - 10th Floor

Room 1012 (10)

Rectangle Table (10)

New York Catering: NYC Catering Menu - Meeting with Catering  
Delivered 9:00 AM - Pending

## Adding Notes:

Add any notes (catering, setup, flipchart, or IT notes) in the **Description Field**.

## Other Features

### My Favorites

The **My Favorites** section on the **Home Page** provides visibility and quick access to specific spaces.

#### ☆ My Favorites

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 P
Room 1015		Meeting								

To set a space as a Favorite, locate it in the **Navigation Tree** and click on the name.

- 10th Floor
  - Room 1012
  - Room 1015
  - Room 1022
  - Room 1027
- 11th Floor
  - SA - Johannesburg

Click on the **Star** next to the information for the space.

**Room 1022** (Capacity 12) ☆

US - New York (Eastern)

Today ◀ ▶ 📅 Sunday, April 23, 2

The Star will turn green and the room will be added to the My Favorites list.

#### ☆ My Favorites

	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM
Room 1015		Meeting						
Room 1022								

To remove a room from the list, follow the same process and click the star again, turning it white.

## Search 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 easy 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, or a percentage sign (%) for a wildcard search.
- 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.

## Display Resource Availability

The Display Resource Availability link under the Quick Links in the **Tool Bar** allows you to search 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:
  - Different **Resource Types** at different locations;
  - Specific **Resource Setups**;
  - Or specific **Resource Characteristics** (equipment or other room features).

## Reports

The **Reports** link is available to some users in the **Tool Bar** at the top of the page. The following tips will help when using the standard reports:

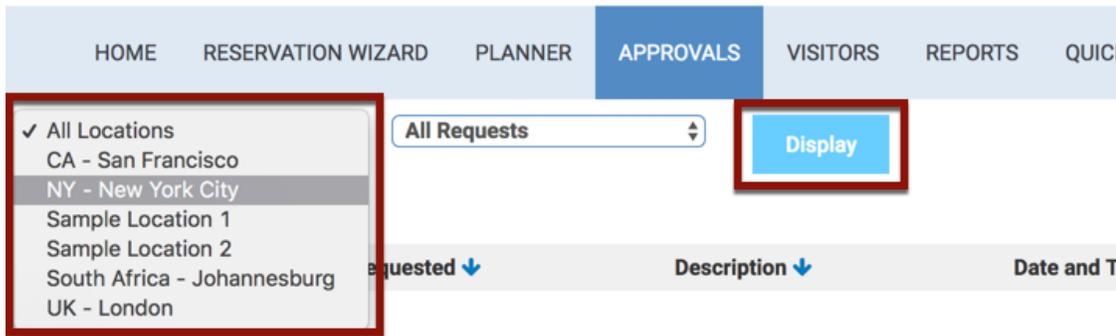
- The **Report Type** drop-down displays categories of reports. Commonly used reports are frequently found in the **Activities and Details**, **Managed Services** and **Resource Utilization** sections.
- You can choose easy **Time Ranges** with the top radio button, or chose a **Custom Time Range** with the bottom one.
- Using the **Scope**, the report can be limited to a single room, group of rooms or location.
- Under **Report Details**, many reports will have a text description and picture of the page format. The **Mark Report as Favorite** will allow you to identify favorite reports you can name as desired. A favorite report will appear at the top the next time you visit the Reports page, and usually maintains the selected Time Range, Scope and Report Format that were set when the report was marked as a favorite.
- Some reports will include other filters under the **Additional Criteria** section.

# Approval Process

Designated users will have an **Approvals** button in the tool bar.



Clicking on this button will display the approvals queue, showing only the rooms you can approve. To focus on a single location, select it from the drop-down list and click **Display**.



Use the **Blue Arrows** in the heading to sort the queue as desired.

Pending Internal Requests

User Name	Requested	Description	Date and Time	Location	Resource	Reservation Type	Action
Basic User	6/23/2017 11:51 AM US - New York (Eastern)	ABC Meeting...	6/26/2017 1:00 PM - 2:00 PM US - New York (Eastern)	NY - New York City	Room 1027	Standan	☑ ✕
Basic User	6/23/2017 11:53 AM US - Massachusetts (Eastern)	Weekly Check-in...	7/3/2017 9:00 AM - 10:00 AM US - Massachusetts (Eastern)	NY - New York City	Room 1012 ⌄, 7/10/2017 9:00 AM, 7/17/2017 9:00 AM, 7/24/2017 9:00 AM, 7/31/2017 9:00 AM, 8/7/2017 9:00 AM, 8/14/2017 9:00 AM, 8/21/2017 9:00 AM, 8/28/2017 9:00 AM, 9/4/2017 9:00 AM, 9/11/2017 9:00 AM, 9/18/2017 9:00 AM, 9/25/2017 9:00 AM	Standan	☑ ✕
Basic User	6/23/2017 11:55 AM US - Massachusetts (Eastern)	Panel Discussion...	7/7/2017 9:00 AM - 12:00 PM US - Massachusetts (Eastern)	NY - New York City	Room 1012	Standan	☑ ✕
				NY - New York City	Room 1027	Standan	☑ ✕
					All Requests		☑ ✕

Click on the **Description** of a reservation to open the Details page.

Pending Internal Requests

User Name	Requested	Description	Date and Time	Location	Resource	Reservation Type	Action
Basic User	6/23/2017 11:51 AM US - New York (Eastern)	ABC Meeting...	6/26/2017 1:00 PM - 2:00 PM US - New York (Eastern)	NY - New York City	Room 1027	Standan	☑ ✕
Basic User	6/23/2017 11:53 AM US - Massachusetts (Eastern)	Weekly Check-in...	7/3/2017 9:00 AM - 10:00 AM US - Massachusetts (Eastern)	NY - New York City	Room 1012 ⌄, 7/10/2017 9:00 AM, 7/17/2017 9:00 AM, 7/24/2017 9:00 AM, 7/31/2017 9:00 AM, 8/7/2017 9:00 AM, 8/14/2017 9:00 AM, 8/21/2017 9:00 AM, 8/28/2017 9:00 AM, 9/4/2017 9:00 AM, 9/11/2017 9:00 AM, 9/18/2017 9:00 AM, 9/25/2017 9:00 AM	Standan	☑ ✕
Basic User	6/23/2017 11:55 AM US - Massachusetts (Eastern)	Panel Discussion...	7/7/2017 9:00 AM - 12:00 PM US - Massachusetts (Eastern)	NY - New York City	Room 1012	Standan	☑ ✕
				NY - New York City	Room 1027	Standan	☑ ✕
					All Requests		☑ ✕

Change the **Reservation Type** if appropriate.

Pending Internal Requests

User Name	Requested	Description	Date and Time	Location	Resource	Reservation Type	Action
Basic User	6/23/2017 11:51 AM US - New York (Eastern)	ABC Meeting...	6/26/2017 1:00 PM - 2:00 PM US - New York (Eastern)	NY - New York City	Room 1027	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Basic User	6/23/2017 11:53 AM US - Massachusetts (Eastern)	Weekly Check-in...	7/3/2017 9:00 AM - 10:00 AM US - Massachusetts (Eastern)	NY - New York City	Room 1012, 7/10/2017 9:00 AM, 7/17/2017 9:00 AM, 7/24/2017 9:00 AM, 7/31/2017 9:00 AM, 8/7/2017 9:00 AM, 8/14/2017 9:00 AM, 8/21/2017 9:00 AM, 8/28/2017 9:00 AM, 9/4/2017 9:00 AM, 9/11/2017 9:00 AM, 9/18/2017 9:00 AM, 9/25/2017 9:00 AM	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Basic User	6/23/2017 11:55 AM US - Massachusetts (Eastern)	Panel Discussion...	7/7/2017 9:00 AM - 12:00 PM US - Massachusetts (Eastern)	NY - New York City	Room 1012	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
				NY - New York City	Room 1027	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
					All Requests		<input checked="" type="checkbox"/> <input type="checkbox"/>

Click the **Checkmark** to approve a reservation, or the **X** to deny it.

Pending Internal Requests

User Name	Requested	Description	Date and Time	Location	Resource	Reservation Type	Action
Basic User	6/23/2017 11:51 AM US - New York (Eastern)	ABC Meeting...	6/26/2017 1:00 PM - 2:00 PM US - New York (Eastern)	NY - New York City	Room 1027	Standan	<input type="checkbox"/> <input checked="" type="checkbox"/>
Basic User	6/23/2017 11:53 AM US - Massachusetts (Eastern)	Weekly Check-in...	7/3/2017 9:00 AM - 10:00 AM US - Massachusetts (Eastern)	NY - New York City	Room 1012, 7/10/2017 9:00 AM, 7/17/2017 9:00 AM, 7/24/2017 9:00 AM, 7/31/2017 9:00 AM, 8/7/2017 9:00 AM, 8/14/2017 9:00 AM, 8/21/2017 9:00 AM, 8/28/2017 9:00 AM, 9/4/2017 9:00 AM, 9/11/2017 9:00 AM, 9/18/2017 9:00 AM, 9/25/2017 9:00 AM	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Basic User	6/23/2017 11:55 AM US - Massachusetts (Eastern)	Panel Discussion...	7/7/2017 9:00 AM - 12:00 PM US - Massachusetts (Eastern)	NY - New York City	Room 1012	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
				NY - New York City	Room 1027	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
					All Requests		<input checked="" type="checkbox"/> <input type="checkbox"/>

If a reservation includes multiple rooms, they can be approved individually, or all at once.

Pending Internal Requests

User Name	Requested	Description	Date and Time	Location	Resource	Reservation Type	Action
Basic User	6/23/2017 11:51 AM US - New York (Eastern)	ABC Meeting...	6/26/2017 1:00 PM - 2:00 PM US - New York (Eastern)	NY - New York City	Room 1027	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Basic User	6/23/2017 11:53 AM US - Massachusetts (Eastern)	Weekly Check-in...	7/3/2017 9:00 AM - 10:00 AM US - Massachusetts (Eastern)	NY - New York City	Room 1012, 7/10/2017 9:00 AM, 7/17/2017 9:00 AM, 7/24/2017 9:00 AM, 7/31/2017 9:00 AM, 8/7/2017 9:00 AM, 8/14/2017 9:00 AM, 8/21/2017 9:00 AM, 8/28/2017 9:00 AM, 9/4/2017 9:00 AM, 9/11/2017 9:00 AM, 9/18/2017 9:00 AM, 9/25/2017 9:00 AM	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Basic User	6/23/2017 11:55 AM US - Massachusetts (Eastern)	Panel Discussion...	7/7/2017 9:00 AM - 12:00 PM US - Massachusetts (Eastern)	NY - New York City	Room 1012	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
				NY - New York City	Room 1027	Standan	<input checked="" type="checkbox"/> <input type="checkbox"/>
					All Requests		<input checked="" type="checkbox"/> <input type="checkbox"/>

Recurring reservations can be approved as a series, or each instance at a time.

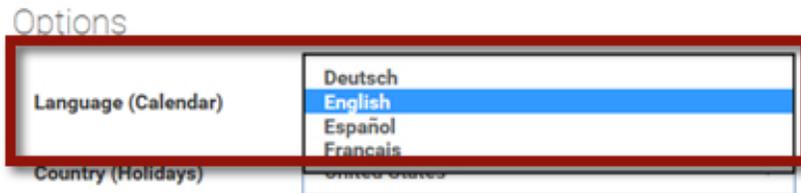
## Setting Personal Defaults

Your personal options allow you to change your preferences such as default location, language and country.

- 1 To change personal options, click on your name on the upper right hand corner of the screen and select **My Information**.



- 2 If necessary, you can adjust the language that Resource Scheduler displays.



- 3 Use the **Country (Holidays)** drop-down to change the holidays that are shown in the Calendar View.
- 4 Use the drop-down lists to choose your home location under **Default Location** and **Default Group**.
- 5 The **Default Calendar View** sets your preference for which calendar view is shown. You may choose Daily, Weekly or Monthly.
- 6 **Time Format** choices will show the calendar in an AM/PM format or in 24-hour format.
- 7 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.
- 8 You (or your system administrator) can change your selections for the lower two sections of the **Home Page Layout** from three choices: **My Favorites** (rooms), **My Reservations** or **My Flagged Reservations**.
- 9 Click the **Submit** button to save your choices.