Resource Booker User Guide

Contents

Resource Booker is the online tool to request rooms across the University of Otago.

NOTE: Resource Booker cannot be used to make bookings for any teaching activities (e.g. lectures, tutorials, labs). These requests must be made to timetables@otago.ac.nz; this will ensure a suitable room is booked and details are made available on student timetables.

Specific Points to note:
"Book on behalf of" feature: this option allows you to book on behalf of another person. The person the room is booked on behalf of will receive an email which can be dragged into their calendar. They will not, however, be able to edit the booking.

Recurring bookings on Tile 2 and Tile 3 (teaching space): It is not possible to edit a single occurrence. Recurrence is restricted to weekly recurrence options.

"Unavailable" showing in room calendar. You will not be able to see details of bookings made by others; these will appear as greyed out blocks with "unavailable" as the title. Approvers and Content Support for those rooms will be able see this information. You will see details for your own bookings (which are also visible in "My Bookings").

Log in to Resource Booker
Go to https://resourcebooker.otago.ac.nz

Resource Booker is a single sign-on application so if you are already logged in on a device on the university network, clicking **Log In** will take you straight to the Make a Booking screen.

If your device is not connected to the university network, you will be prompted to enter your University of Otago username and password after clicking **Log In**.
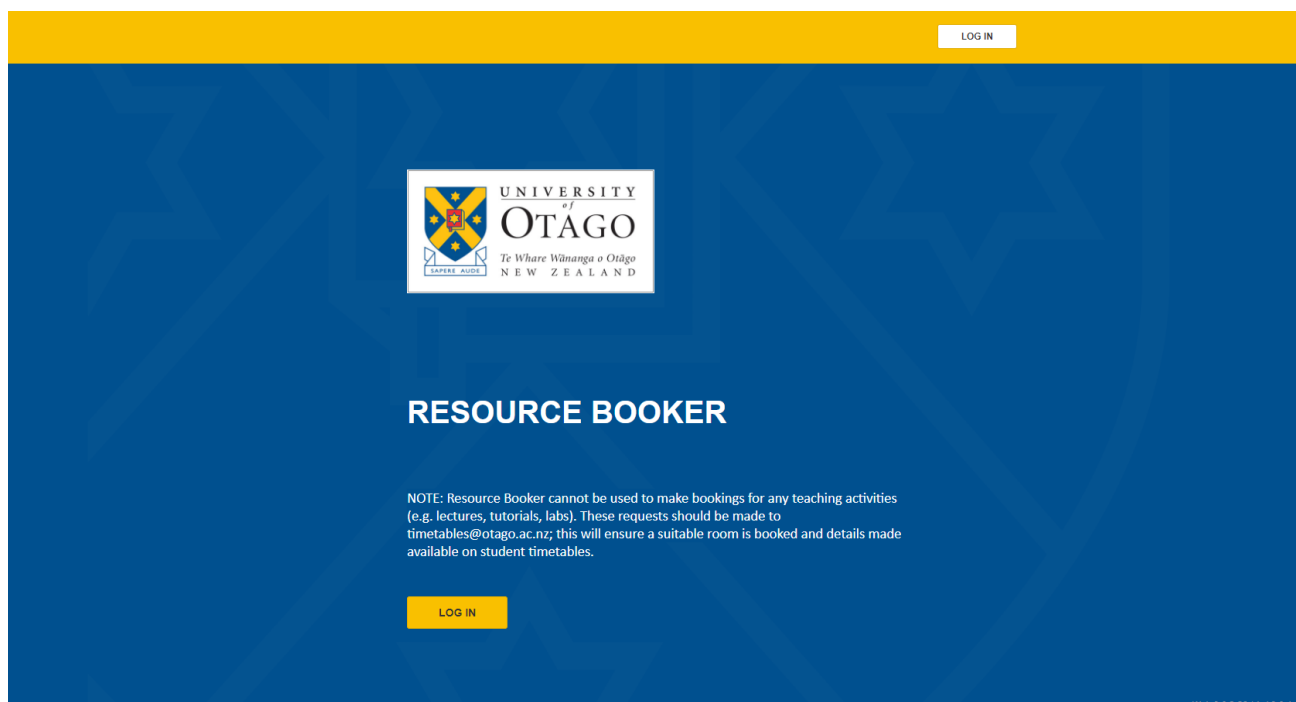
NOTE:

You will be able to view the Timetables managed spaces in Resource Booker by clicking on the **View bookings of Teaching Spaces** to check availability. Be aware however, that until the teaching timetable has been completed, availabilities shown are tentative only. Once the Timetable has been set, the **Request a Casual Booking of Teaching Space** tile will appear.

Make a Booking

The Resource Booker dashboard you will see is customised to each user. This means that you will only see the rooms available for you to book. This will include access to meeting room bookings, and casual bookings for teaching spaces.

There are two ways to make a booking:

        Checking for available rooms at a particular day and time (Dynamic Search)
        Checking a specific room or location for availability (Specific Search)

Both approaches allow you to make single or recurring bookings. Once you have logged in, you will see the **Make a booking screen**.

HINT:
If you know which room you want, but are not sure which tile it is in, use the top right hand search bar and enter the room name.
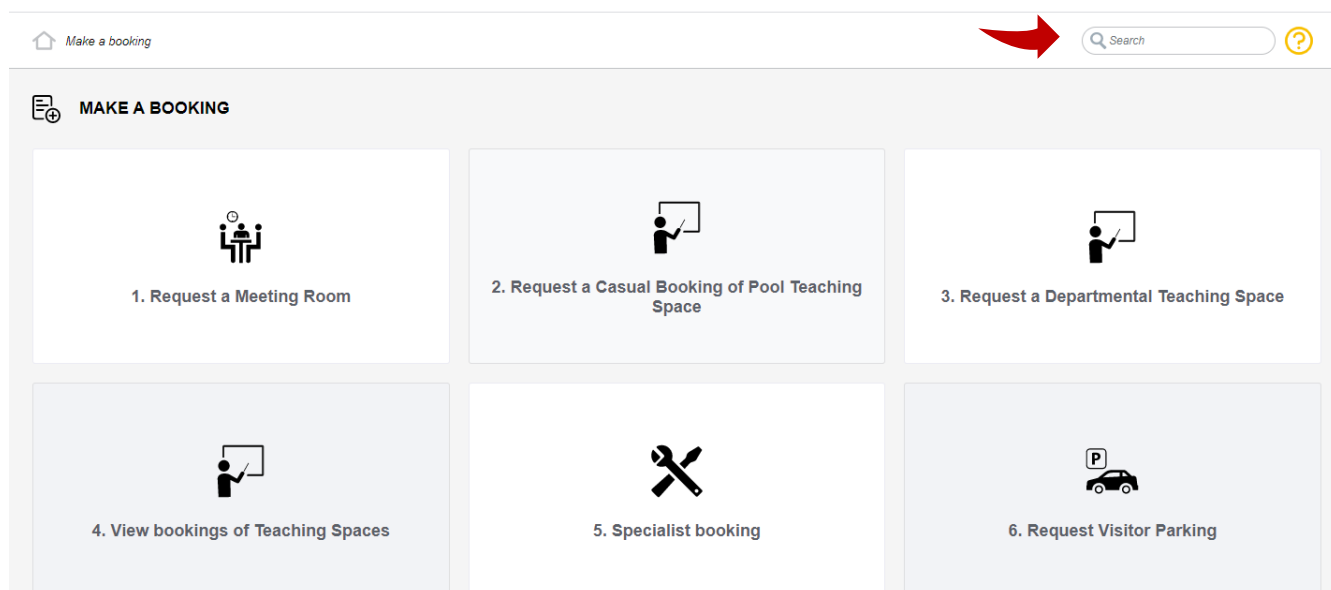
In the middle of the screen will be a choice of tiles for you to select the type of room you want to book.
Tile 1 Request a Meeting Room is for bookings in rooms that are managed by departments.
Tile 2 Request a casual booking of Pool Teaching Space is for **casual** booking of rooms/lecture theatres etc managed by Timetables. These rooms are normally only available to book from mid-March once the student timetable has been confirmed. Click on the relevant tile.
Tile 3 Request a Department Teaching Space is for requesting a booking in teaching spaces managed by departments (not Timetables).

NOTE: Resource Booker cannot be used to make bookings for any timetabled teaching activities (e.g. lectures, tutorials, labs). These requests must be made to timetables@otago.ac.nz; this will ensure a suitable room is booked and details are made available on student timetables.

The following screen shows you a list of rooms with options to refine your search are on the right-hand side. The list in the centre of the screen contains:

2   Folders containing lists of rooms by location

3   Individual rooms that are available

4   If you want a date in the following month (e.g. in the calendar below, if you want to select 17 July) you will need to click the **>** to move the month to July. That is, only dates in the month showing can be selected.

If you refine your search using the filters on the right-hand side of the screen, the list of available rooms will update accordingly. The location folders will remain the same.

Dynamic Search

Single Booking

The system will automatically pre-select the single booking icon. Select the required date from the calendar. Note that the system will not allow you to book in the past (prior day)

Alternatively, you can click on the **Available Now** tick box to check real time room availability

Enter the **To** and **From** times

Refine your search by inputting minimum or maximum room capacities you wish to view

Further refine your search by selecting from the list of room equipment, accessibility options, and room layout.

6 If you want further details about an available room, click on the information icon ⓘ

7 Once you have decided which room you wish to book, click on the room name to see the calendar view. In the calendar, click the day and time you wish to book.

1. REQUEST A MEETING ROOM   ⓘ

ⓘ When booking a room outside your department, please contact the relevant CS Administrator to check on any specific access requirements such as collecting a door key.   ✕

🔍 Search a resource

▼ 📁 Groups

    📁 **4** Anatomy Department

    📁 **3** IT Services

    📁 **4** OBS Boardroom Workstations

    📁 **3** OBS Rooms

    📁 **5** OMS Dean's Office

    📁 **3** Pathology Department

    📁 **3** Psychology Department

Dunedin Hospital Dean's Meeting Room 1.04   ⓘ

Dunedin Hospital Foyer Meeting Room 1902   ⓘ **6**

Dunedin Hospital Lecture Theatre Foyer 1802   ⓘ

Dunedin Hospital Octagonal Room 1805   ⓘ

‹ 1. REQUEST A MEETING ROOM

PATHOLOGY DEPARTMENT   ⓘ   ABOUT: PATHOLOGY DEPARTM...

ⓘ When booking a room outside your department, please contact the relevant CS Administrator to check on any specific access requirements such as collecting a door key.   ✕
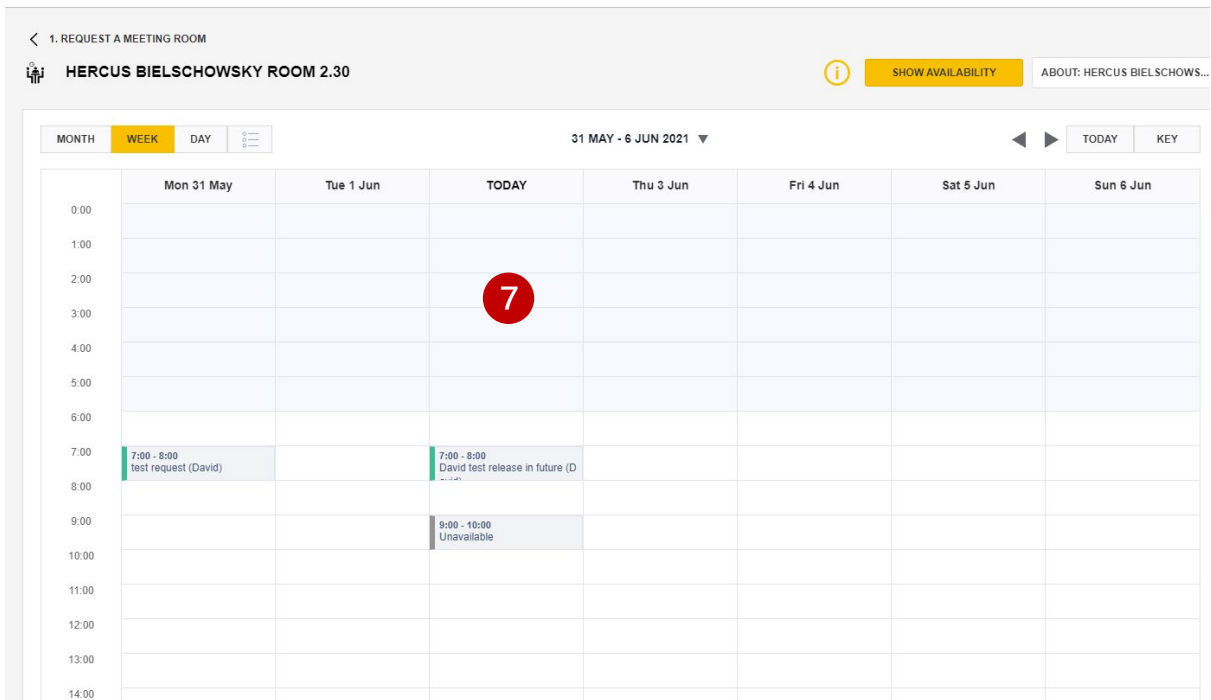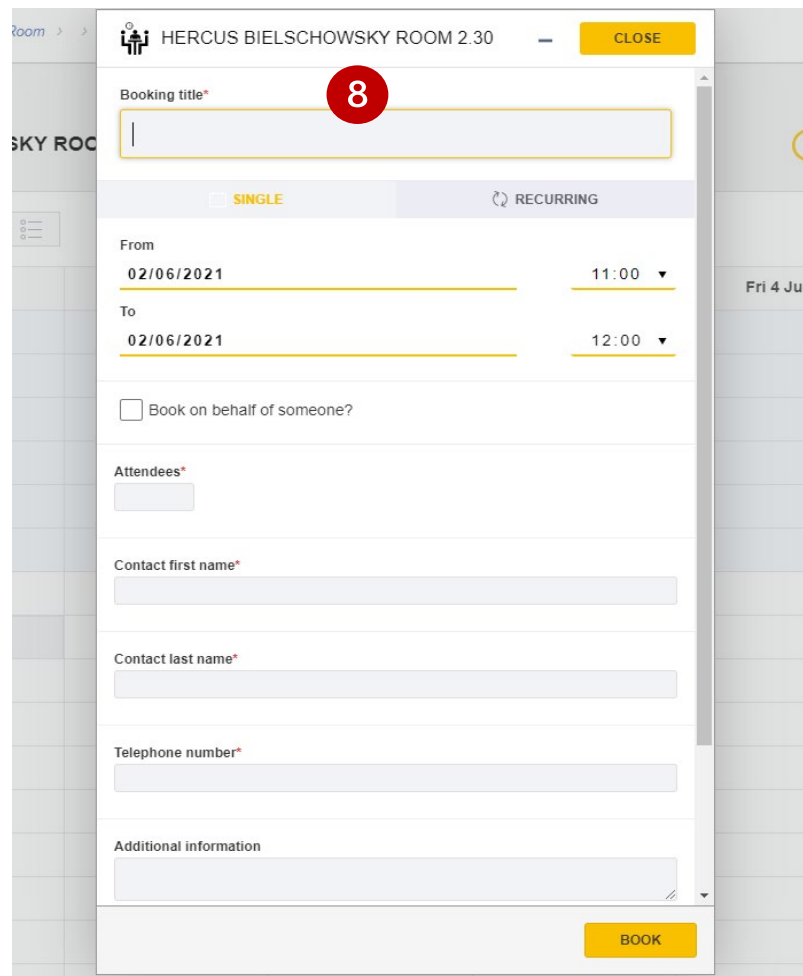
🔍 Search a resource

Hercus Bielschowsky Room 2.30   ⓘ

DESCRIPTION	Pathology
CAMPUS LOCATION	Dunedin Campus - South
PROPERTY SERVICES ROOM CODE	D206.L02.30
ROOM CAPACITY	20
REDUCED CAPACITY	
ROOM ATTRIBUTES	Accessible

6

Hercus Meeting Room (Tea Room) G.16   ⓘ

Hercus Meeting Room G.18   ⓘ

NO MORE RESULTS

HERCUS BIELSCHOWSKY ROOM 2.30

(i) SHOW AVAILABILITY   ABOUT: HERCUS BIELSCHOWS...

| MONTH | WEEK | DAY | ☰ | | 31 MAY - 6 JUN 2021 ▼ | | ◄ ► | TODAY | KEY |

| | Mon 31 May | Tue 1 Jun | TODAY | Thu 3 Jun | Fri 4 Jun | Sat 5 Jun | Sun 6 Jun |

0:00
1:00
2:00   ⑦
3:00
4:00
5:00
6:00
7:00   7:00 - 8:00   7:00 - 8:00
       test request (David)   David test release in future (D
8:00
9:00   9:00 - 10:00
                                Unavailable
10:00
11:00
12:00
13:00
14:00

⑧ The **booking form** will open and be pre-populated with the date and time information. See the Completing the Booking Form section below.

Room > >

🏃 HERCUS BIELSCHOWSKY ROOM 2.30   —   CLOSE

SKY ROC

Booking title*   ⑧

[   ]

| ☐ SINGLE | ↻ RECURRING |

From
02/06/2021   11:00 ▼

To
02/06/2021   12:00 ▼

☐ Book on behalf of someone?

Attendees*
[   ]

Contact first name*
[   ]

Contact last name*
[   ]

Telephone number*
[   ]

Additional information
[   ]

BOOK

Recurring Booking

1   Select the **Recurring** tab

2   The date and time will prepopulate if you have selected a date and time for the first meeting. Otherwise, to enter the **Start Date** click in the start date field. A calendar will appear; select date and then select start and end times.

3   Select the **Frequency** (daily, weekly, monthly) using the drop-down list. Other options become available depending on which of these you choose. Selecting different frequencies presents you with different views.

4   The **Every** function allows you to further specify the frequency of your booking (e.g. every 2 weeks).

5   Use the **Exclude Weekends** tick box if using daily frequency and you don't want to include weekends.

6   **Repeat until** has two options: **Nr. Occurrences** (the default), or **Date**.
Use **Nr Occurrences** to enter the number of occurrences (up to a maximum of 12).
Selecting the **Date** option will replace "Occurrences" with Date. Clicking anywhere in the date area will open a calendar.

Daily view allows you to select how many days you want the booking to repeat. You can also choose to exclude weekends.

Weekly view allows you to select the specific days of the week:

Monthly view allows you to select specific days or periods of the month (for example, the third Thursday of each month):
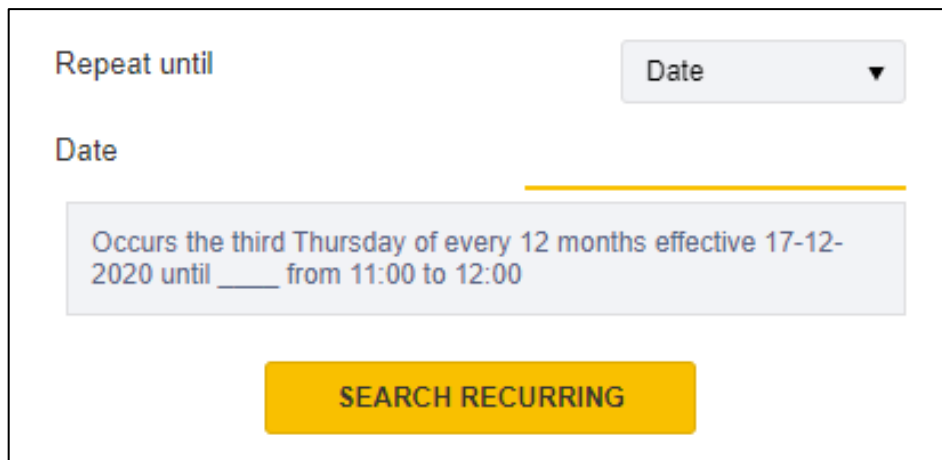
Use **Repeat Until** to either enter the number of occurrences (up to a maximum of 12), or to make bookings until a specific date. If using the date function, the menu will appear blank until clicking in the area; a calendar will pop up. Details of the occurrences selected will appear below.

Repeat until	Date ▼
Date	

Occurs the third Thursday of every 12 months effective 17-12-2020 until _____ from 11:00 to 12:00

SEARCH RECURRING

You can refine your search further by inputting minimum or maximum room capacities, room attributes, or campus location as with the single booking process.

Specific Search

Use specific search when you know which room you wish to book, or which area of campus your meeting needs to be held.

If you know which room you wish to book, use the **Search** function.

Enter the room name (at least the first three letters to help narrow the search) into the search box. Select the room from the list that appears.
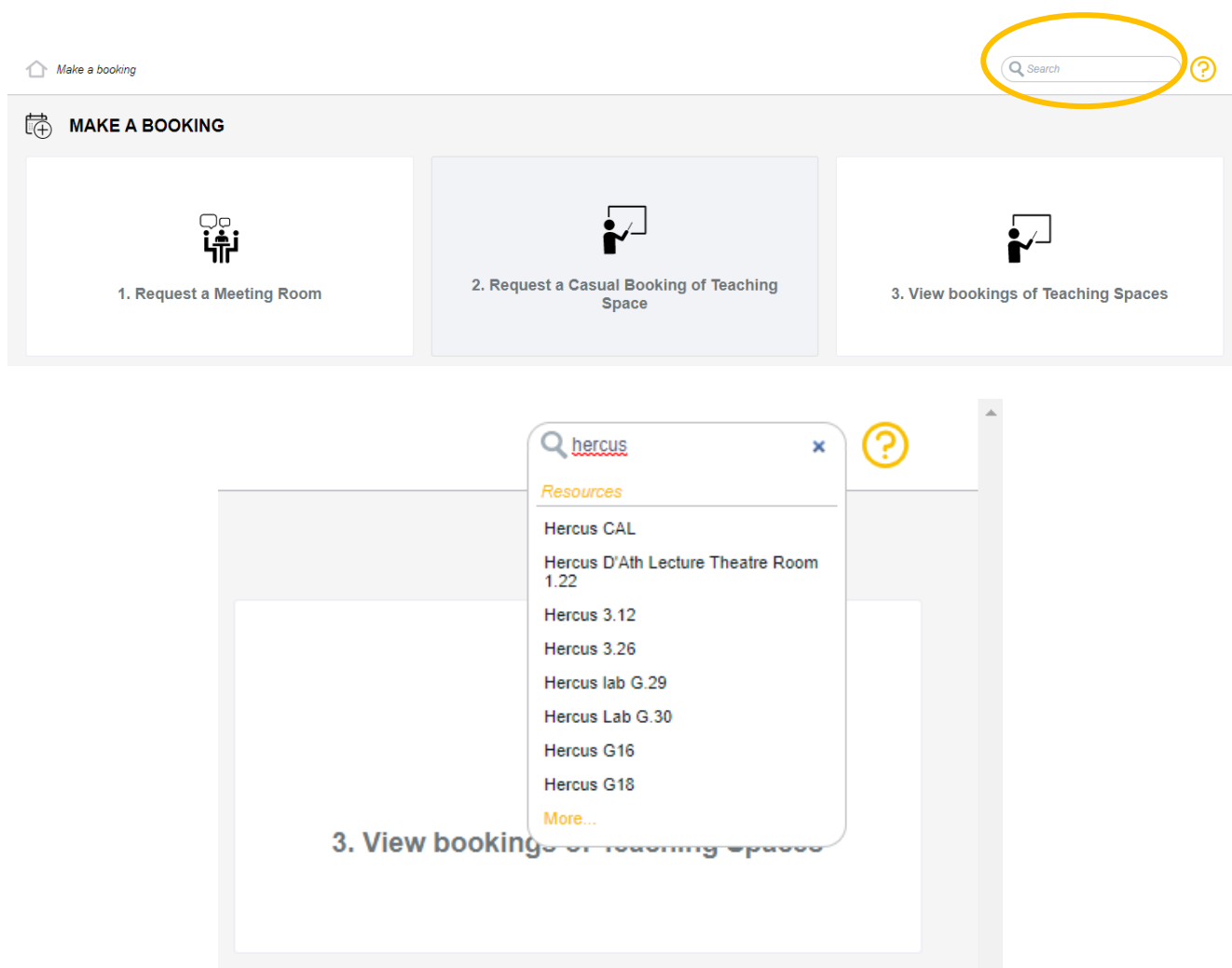
This will take you to the **current week calendar view** for the room where you can continue with booking.

If you are looking for a room in a specific area of campus:

1 Select a location folder

2 Select a room from the list.

3 The calendar view opens in week view as default. You can use these buttons to change to day view, month view, or list view.

4 Click on an available timeslot in the calendar to open the booking form.
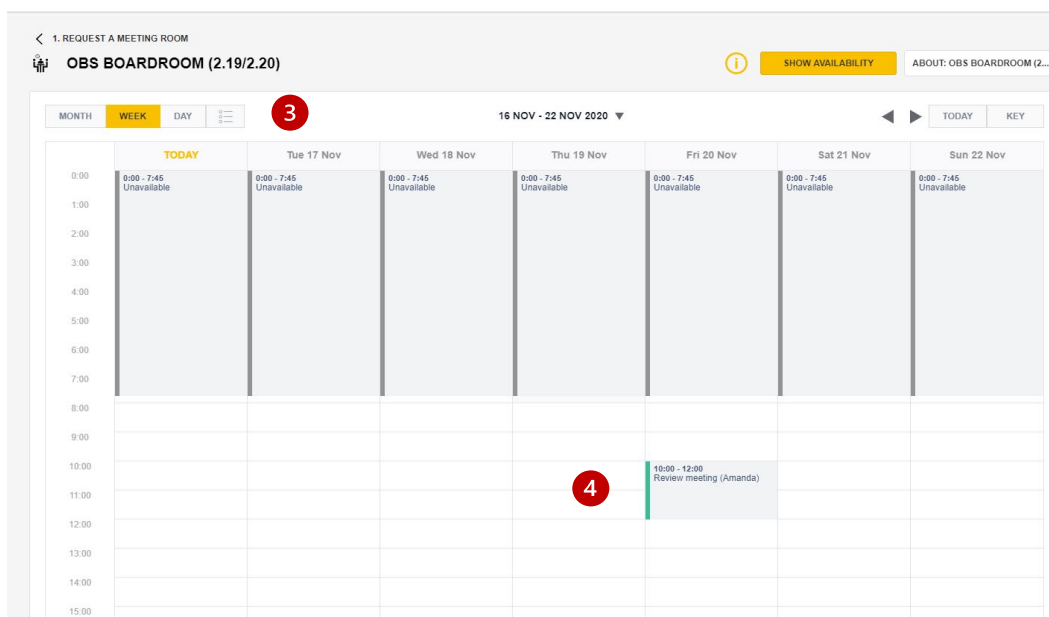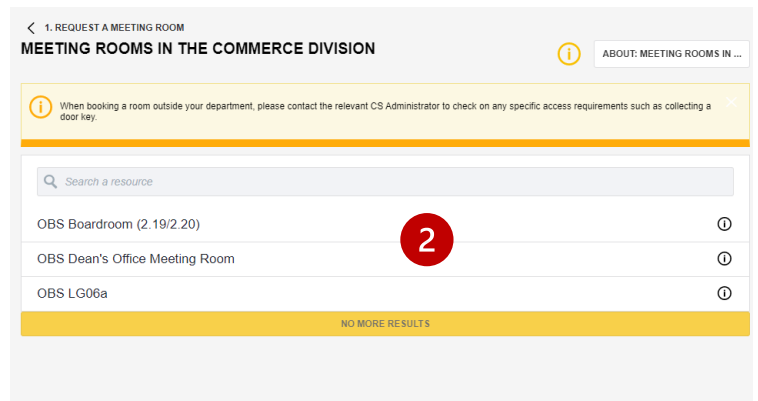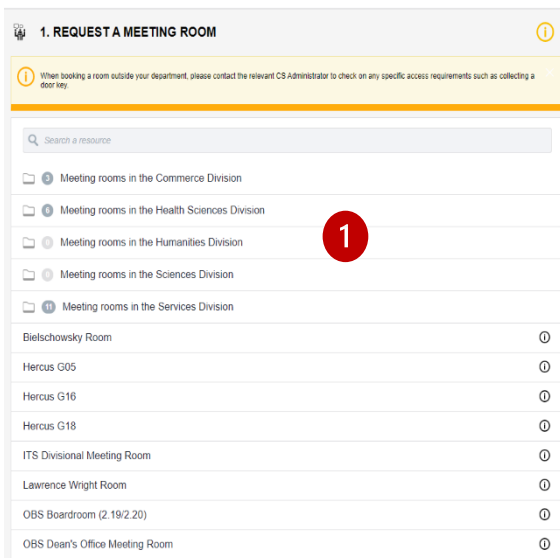
Completing the Booking Form

Single Booking

1 Enter the **Booking Title**. Date and time fields will be pre-populated. Double check the date and time to/from fields.

2 To **book on behalf of someone**, select the tick box and then add emails (one per line) in the box that appears below **NOTE: The person the room is booked on behalf of will receive an email which can be dragged into their calendar. They will not be able to edit the booking.**

3 Enter the expected **number of attendees.**

4 Enter the **name of the contact person** for the booking

5 Enter **contact phone number**

6 Click to agree to the **Room Booking Polic** Once you have completed the booking form, click the **Book** button. You will see message indicating that the booking has been accepted.

You will receive an email notification of your booking, and an on-screen confirmation will appear.

Recurring Booking

1   Select the **Recurring** tab and enter a **Booking Title**.

2   Date and time fields will be pre-populated. Double check the date and time to/from fields.

3   Select the **Frequency** of the booking (daily, weekly, or monthly) and further specify with the **Every** field (this will be pre-populated if you originally performed a dynamic search).

4   Check the **Exclude Weekends** box if you don't wish to include weekends in your search.

Repeat Until: Select either the number of occurrences or date. Selecting **date** will add a line, clicking on the line will bring up a calendar.

5   Complete the other fields for the recurring booking. These will differ depending on the options selected for frequency.

6   Complete the remainder of the booking information

OBS MEETING ROOM LG06A   —   CLOSE

Booking title*

1

SINGLE	RECURRING

Start date	10/07/2021
Start time **2**	11:00 ▾
End time	12:00 ▾
Frequency **3**	Daily ▾
Every	1
	day
Exclude weekends	☐
Repeat until **4**	Nr. occurrences ▾
Occurrences	2

Occurs every day effective 10-07-2021 until 11-07-2021 from 11:00 to 12:00

☐ Book on behalf of someone?

Attendees*

Contact first name*

Contact last name*   **6**

Telephone number*

Additional information

Room Booking Policy

I agree to abide by the University's Casual Room Booking Policy*
○ Yes

BOOK

OBS BOARDROOM (2.19/2.20)   CLOSE   **5**

First	Second	Third
Fourth	Last	

Mon	Tue	Wed	Thu
Fri	Sat	Sun	

Repeat until   Date ▾

Date

Occurs the ____ ____ of every 2 mon... 15:00

November 2020

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

☐ Book on behalf of someone?

Attendees*

Once you have completed the booking form, click the **Book** button once. If the booking cannot be made due to an issue with one or more of the recurring bookings, you will see an error message at the top of the booking form:
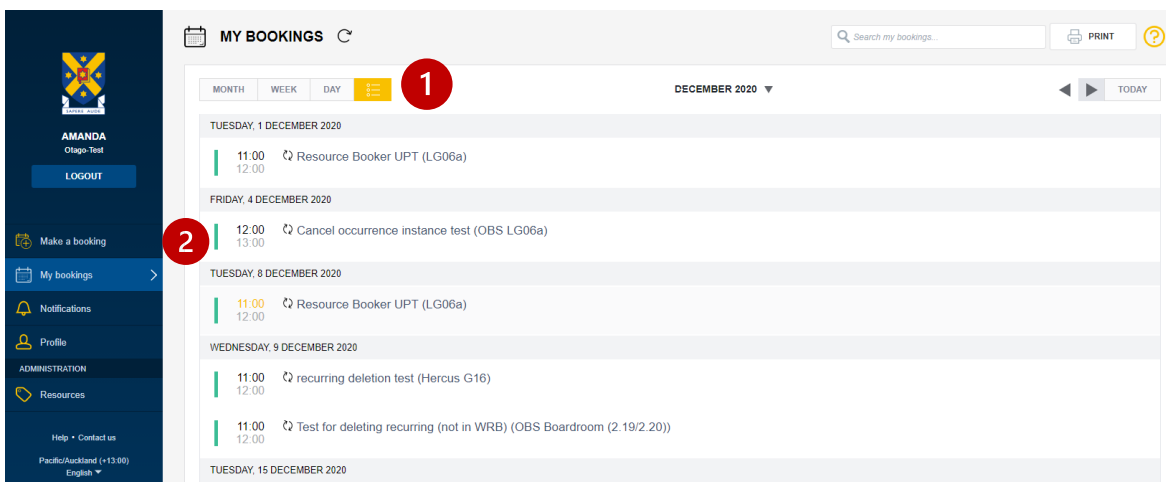

You will need to correct the booking before it will be accepted.

If the room you have selected is on a "request" basis, your booking will be confirmed by an approver and your booking will be pending until its approval. Your booking request will send a notification to the relevant approver who will manage this appropriately.

When your booking is successfully made, you will receive an email notification along with an on-screen confirmation. The first three occurrences will be listed in the confirmation; clicking on "show all" to see all occurrences:

My Bookings

(1) Your bookings appear in the **My Bookings** screen in a calendar week view by default. It is recommended that **List** view (shown below) is a better option as it shows all bookings for the current month. You can also view in month view.

(2) The bookings are colour coded by booking status: green = accepted; blue = pending approval Recurring bookings have the recurring symbol

(3) Click on an event to view the booking details.

(4) You can **edit** or **cancel** bookings using the buttons at the bottom of the details window.

Edit a Booking

Single Booking

① If you choose to edit a booking, the **booking form** re-opens in your calendar view with the original booking details pre-populated.

If you are making changes to the number of attendees, check the room capacity before doing so. The system does not prevent you from exceeding capacity in this window.

You will not be able to edit the room using this function. If you need an alternative room, you will need to cancel the original booking and make a new one.

Once the booking is accepted you cannot add "book on behalf of" to the booking.

② Click **Update** to make the changes to the booking. You will then return to the **My Bookings** calendar view with the revised booking details superimposed. You will also receive an email notification.

③ On the revised booking details selecting the **Revision** button provides a view of the previous status of the booking.
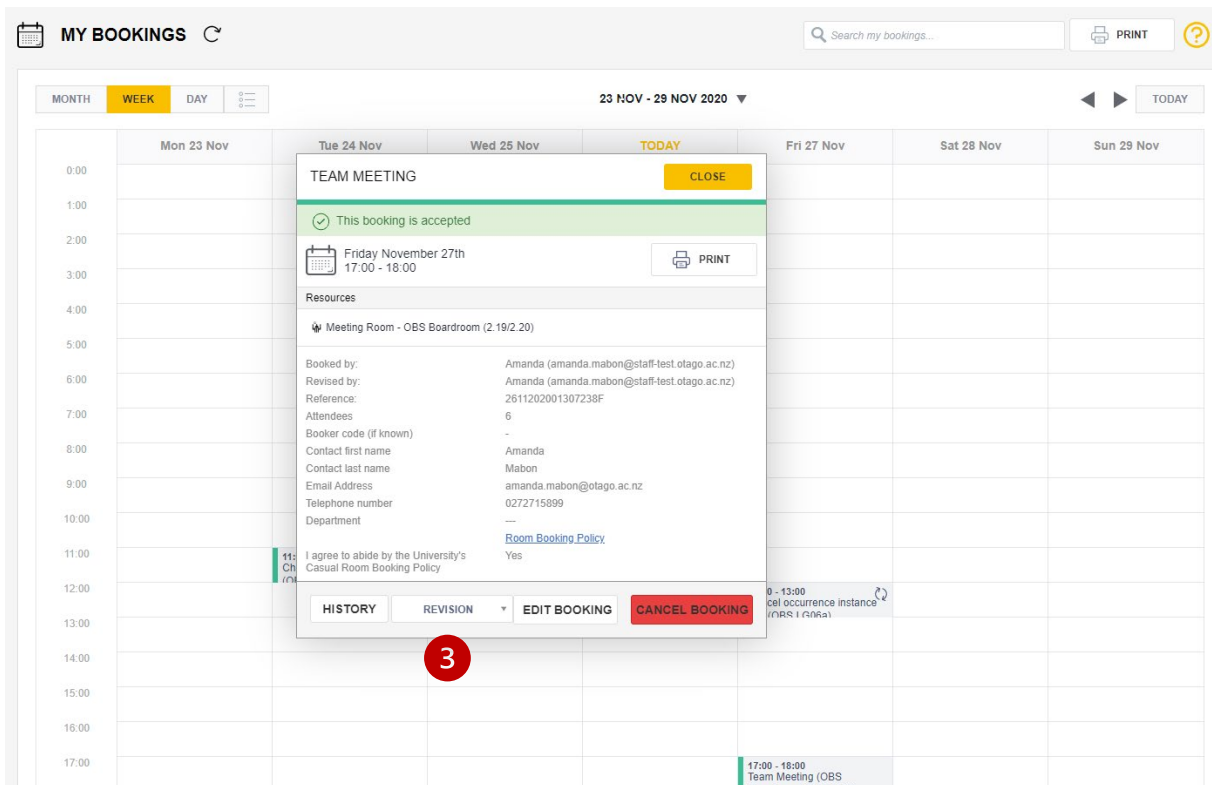
Recurring Booking

If you click on a recurring booking and hover the cursor over the **Edit** button, you are presented with the option to edit the occurrence you have selected, or the entire series:
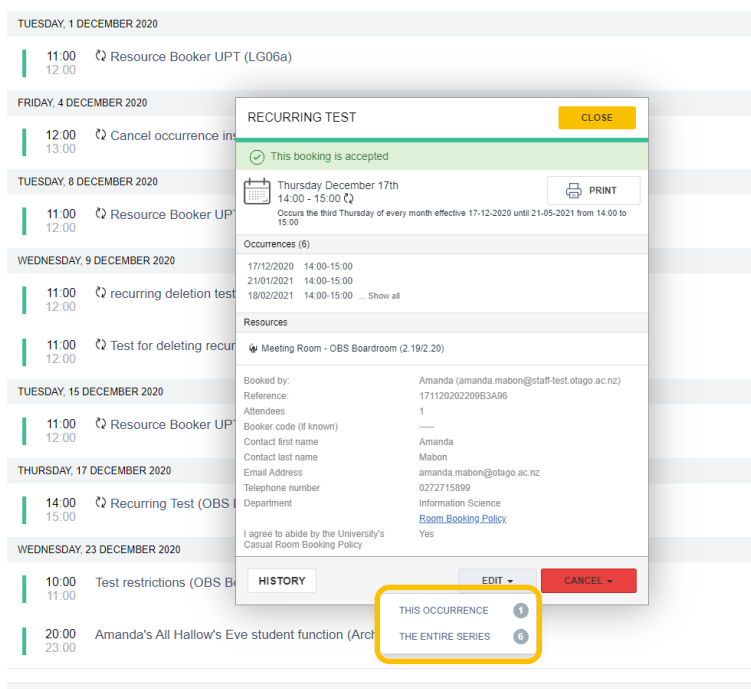
Editing this Occurrence

If you select to edit this occurrence, a condensed version of the **booking form** re-opens in your calendar view with the details of this occurrence pre-populated:

You can edit the date and time, but not the room. Once you have made any changes, click **Update**. If successful, you will be taken back to the **My Bookings** calendar view with the revised booking details superimposed. You will also receive an email notification. The on-screen confirmation will highlight the occurrence that has been edited from its original date/time. **Note: If it is a casual booking for a teaching space it is not possible to edit a single occurrence.**

Editing the Entire Series

If you select to edit the entire series, the full **booking form** re-opens in your calendar view with the booking details for the series pre-populated:

① If you select **Update occurrence pattern** tick box, the **booking form** changes to show the details relating to frequency and repeat occurrences:

Recurring Booking

1 Select the **recurring booking** tab and enter a booking title

2 Double check the start date, start time and end time

3 Select the **frequency** of the booking (daily, weekly or monthly) and further specify with the **Every** field (this will be pre-populated if you originally performed a **dynamic search**

4 Check the **Repeat until** details (either select number of occurrences up to 12 or a specific date). The grey box below will provide further details on the booking occurrences selected.

5 To **Book on behalf of someone**, check the box and add email addresses one per line in the box that appears.
NOTE: The person the room is booked on behalf of will receive an email which can be dragged into their calendar. They will not be able to edit the booking.

6 Complete the remainder of the fields – all are mandatory except **Booker Code**.

7 **Room Booking Policy:** click on the link to read the Policy and check the **Yes** button to confirm.

8 Click the **Book** button

If the booking cannot be made due to an issue with one or more of the recurring bookings an error message will appear at the top of the booking form.

When your booking is successful you will receive an email notification of your booking, along with an on-screen confirmation (as with a **single** booking) which will list the Occurrences.

How to Review Your Bookings

You can review your bookings at any time by selecting **My Bookings** from the menu options (this option is not available if the room has been booked on your behalf). This will show you all the bookings you have made and can be organised by M**onth, Week, Day** or **List** (list view below). Each booking will be categorised by a colour.
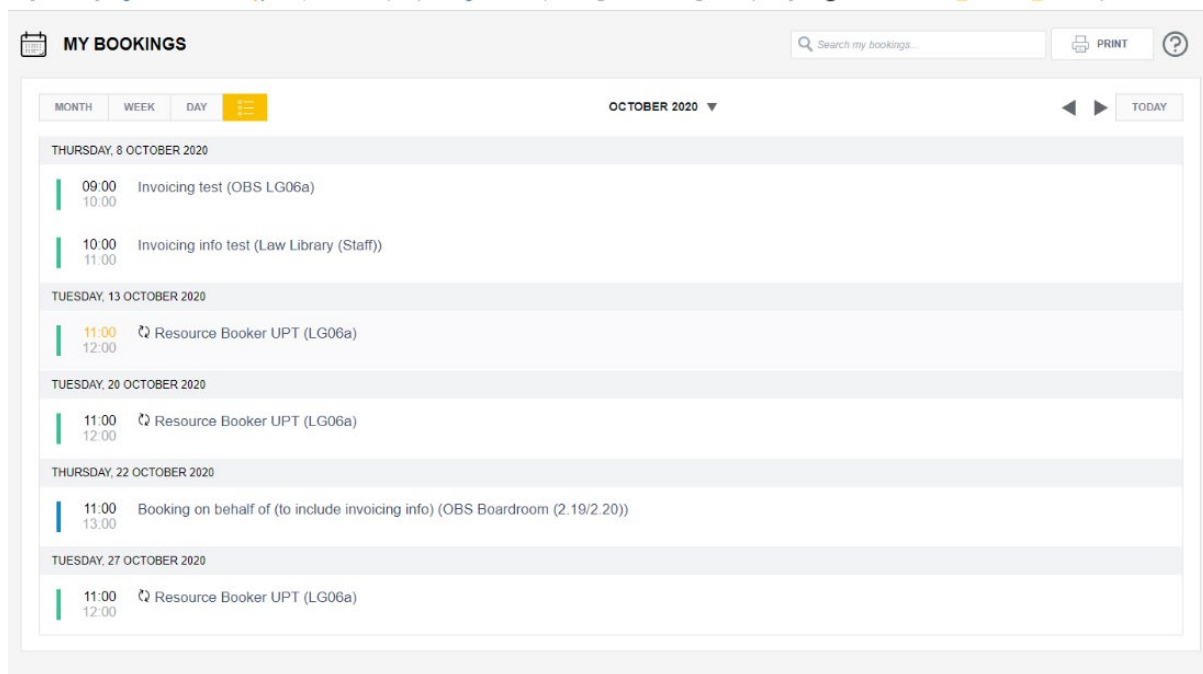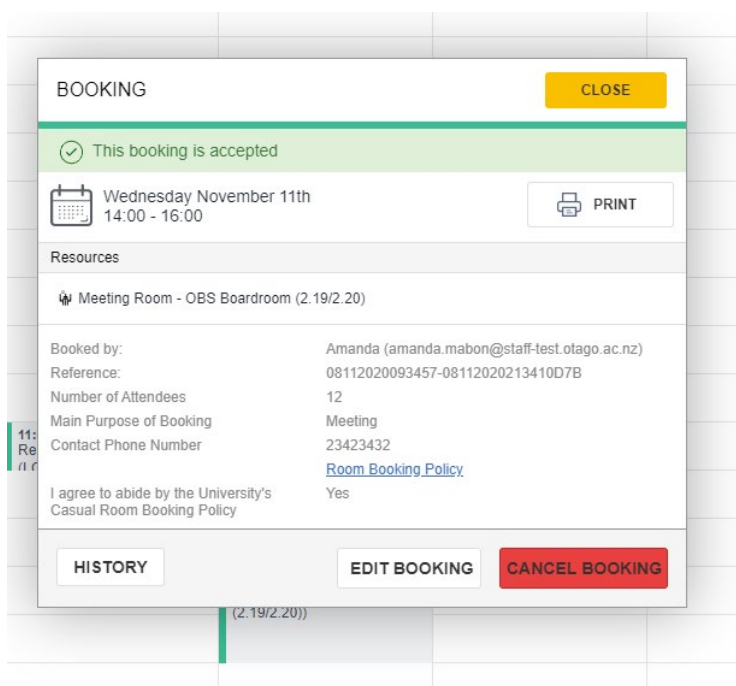

Blue is Awaiting Approval, Green is a Confirmed Booking

Recurring Bookings are identified in views by the recurring symbol:

Click on an event in the calendar or list view to view the booking details.
You can **edit** or **cancel** bookings using the buttons at the bottom of the booking details window.

How to Amend Your Booking

You can amend your open bookings at any time. Amending will allow you to update all details including title and date. In some cases, this may require the booking to be approved again. **Note: if the booking has been made for you using the "book on behalf of" feature you will not be able to edit the booking. You will need to contact the person who made the booking for you.**

First find and click on the booking you would like to amend through **My Bookings**. You can use the month, week, day, or list view to do this.

Click on an event in the calendar or list view to view the booking details.

This opens the Booking Confirmation Screen, select **Edit Booking**.

Single Booking

If you choose to **Edit** a booking, the **booking form** re-opens in your calendar view with the original booking details pre-populated.

NOTE:
If you are making changes to the number of attendees, please check the room capacity before doing so. The system does not prevent you from exceeding capacity in this window.

You will not be able to edit the room using this function. If you need an alternative room, you will need to cancel the original booking and make a new one.

Click **update** to make the changes to the booking. You will then return to the **My Bookings** calendar view with the revised booking details superimposed. You will also receive an email notification.

If your changes are not possible you will receive an error message. Please revise your amendments accordingly or **Cancel** to keep the booking as it is.

If your changes are successful, click **Close** to continue.

Within the revised booking details, you can select the **Revision** button to view the previous status of the booking.

Recurring Booking

NOTE: If your recurring booking is for a casual booking of pool teaching space (Tile 2), or for departmental teaching space (Tile 3) single occurrences cannot be amended. The entire series must be amended. Recurring bookings in these rooms are limited to weekly.

If you click on a recurring booking and hover the cursor over the **Edit** button, you are presented with the option to edit the occurrence you have selected, or the entire series:
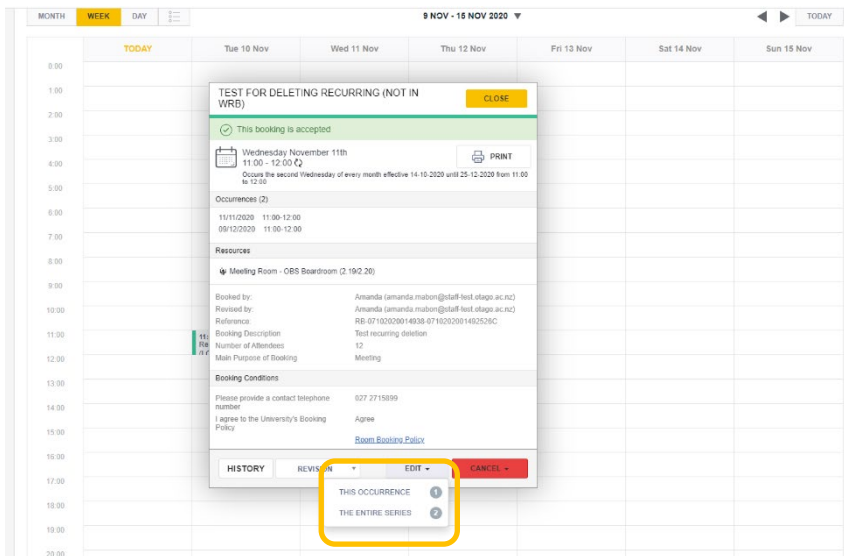
Editing this Occurrence

If you select to edit this occurrence, a condensed version of the **booking form** re-opens in your calendar view with the details of this occurrence pre-populated:

You can edit the date and time of the booking but not the room. Once you have made any changes, click **Update**. If successful, you will be taken back to the My Bookings calendar view with the revised booking details superimposed. You will receive an email notification of the update. The on-screen confirmation will highlight the occurrence that has been edited:
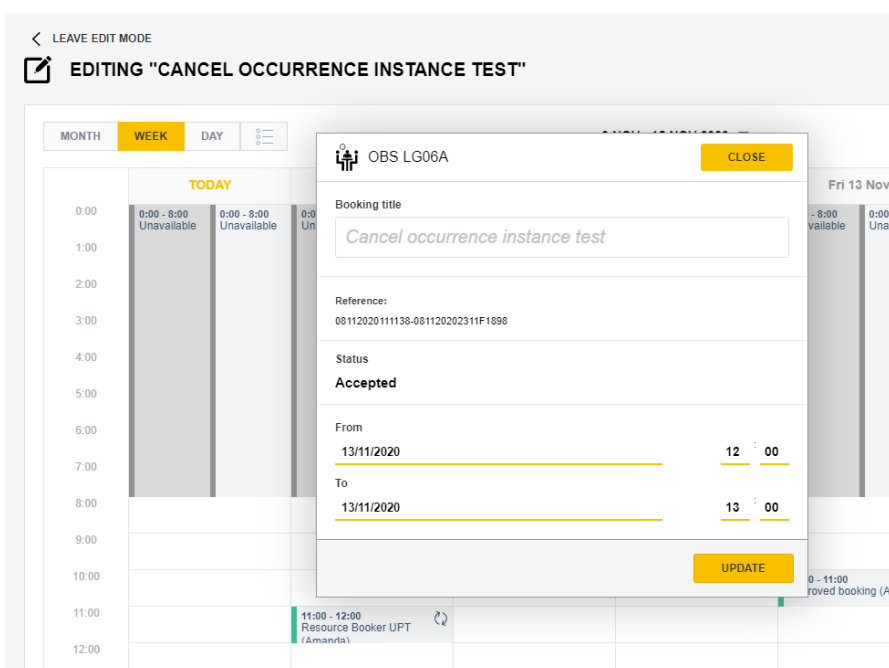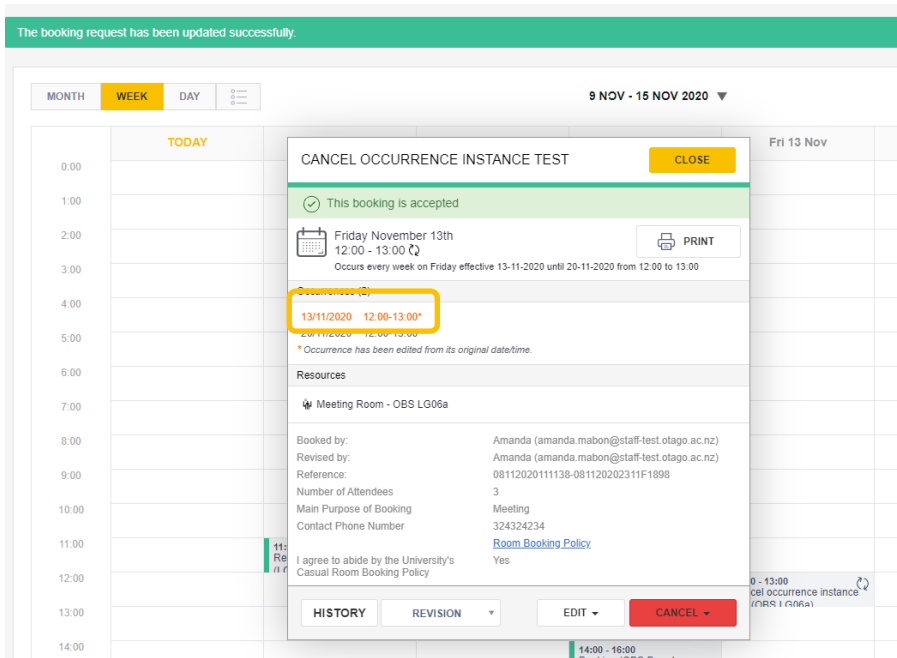
Editing the Entire Series

If you select to edit the entire series the full **booking form** re-opens in your calendar view with the booking details for the series pre-populated.

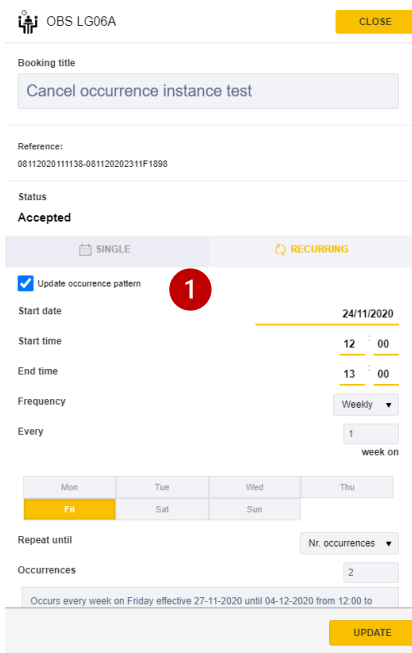If you select the **Update occurrence pattern** tick box, the **booking form** changes to show the details relating to frequency and repeat occurrences.

If you are making changes to the number of attendees, please check the room capacity before doing so. The system does not prevent you from exceeding capacity in this window.

You will not be able to edit the room using this function. If you need an alternative room, you will need to cancel the original booking and make a new one.

You can turn a recurring booking into a single booking in **edit** mode simply by selecting the **Single** tab This works both ways—you can turn a single booking into a recurring one in **edit** mode.

Click **Update** to make the changes to the booking. You will return to the **My Bookings** calendar view with the revised booking details superimposed showing details of each occurrence. You will receive an email notification.

Within the revised booking details, you can select the **Revision** button to view the previous status of the booking.

How to Cancel Your Booking

If you choose to cancel your booking, please make sure that you cancel it through Resource Booker. This will free up the available resource, allowing others to use the space.

Single Booking
Find the booking you would like to cancel through **My Bookings.**

This opens the **Booking Confirmation** window. Select **Cancel Booking.** You will then be asked if you wish to cancel the booking, select **Yes** to continue or **No** if you want to keep the booking as it is.

CANCEL OCCURRENCE INSTANCE TEST   CLOSE

✓ This booking is accepted

📅 Friday December 4th   🖨 PRINT
   12:00 - 13:00 ↻
   Occurs every week on Friday effective 27-11-2020 until 04-12-2020 from 12:00 to 13:00

Occurrences (2)

27/11/2020   12:00-13:00
04/12/2020   12:00-13:00

Resources

👥 Meeting Room - OBS LG06a

Booked by: Amanda (amanda.mabon@staff-test.otago.ac.nz)
Revised by: Amanda (amanda.mabon@staff-test.otago.ac.nz)
Reference: 08112020111138-081120202311F1898
Number of Attendees   3
Main Purpose of Booking   Meeting
Contact Phone Number   324324234
                              Room Booking Policy
I agree to abide by the University's   Yes
Casual Room Booking Policy

HISTORY   REVISION ▼   EDIT ▾   CANCEL ▾

CONFIRM CANCELLATION

Are you sure you want to cancel this single occurrence?
Add optional note

                                        NO   YES

If you select **No** you will return to the previous screen. If you select **Yes** you are taken back to the **My Bookings** calendar view, with the green banner at the top of the screen confirming the decision. The booking will then be removed from your calendar of bookings and you will receive an email confirming the cancellation. The booking will no longer be visible in the **My Bookings** screen.
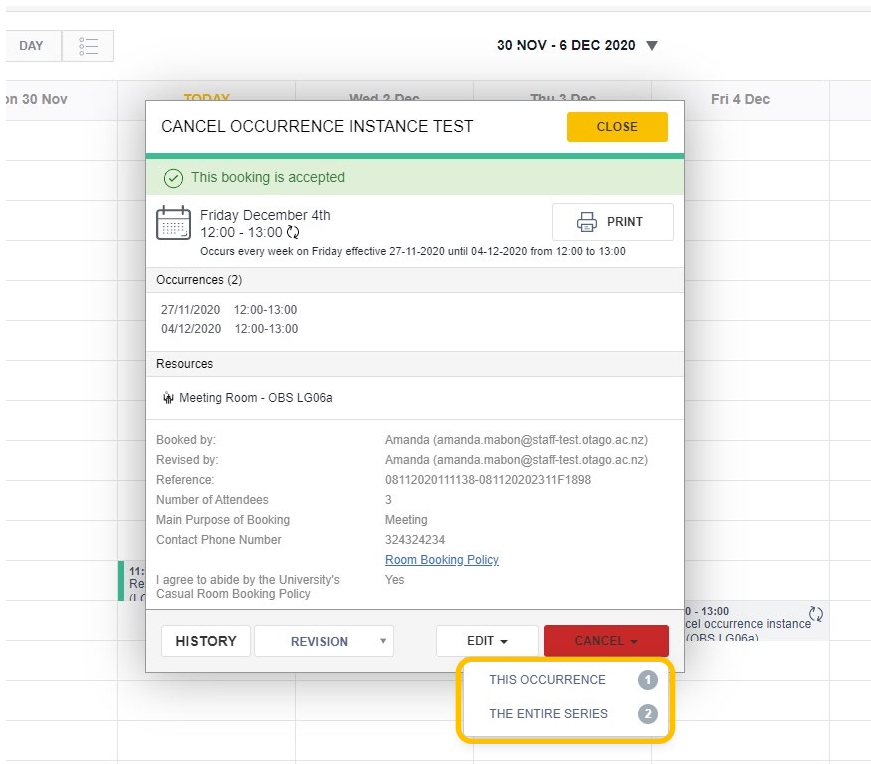
Recurring Booking

Following the same process as for a single booking, you will be given the option of cancelling an **occurrence**, or the **entire series**. The **confirm cancellation** pop up will appear for you to select **No** or **Yes**.

If you select **No** you will return to the previous screen. If you select **Yes** you are taken back to the **My Bookings** calendar view, with the green banner at the top of the screen confirming the deletion.

The booking will no longer appear in the **My Bookings** screen.