Hybrid working: Resource Booker – super user guide

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Introduction

Resource Booker is an online platform used for reserving resources, such as spaces or desks, around the College. It is a particularly helpful resource as we continue with a hybrid working model.

This guide will explain the different functionality of the platform, and how to use it as a ‘super user’ for hybrid working. The scope of the guide is only for hybrid working resources and for the below participating Professional Services teams:

- Academic Quality and Policy
- Careers
- Commercial Services
- Educational development
- Library
- Organisational development
- Research and Innovation
- Strategy and Planning
- Student Administration
- Estates
- Finance
- Health and Safety
- Human Resources
- IT
- Legal and Compliance
- Marketing and Communications

Primarily, designated super users of these participating hybrid working teams can:

- Make resource bookings
- Edit bookings
- Manage other users
- View and run reports

As a super user, you have responsibility for managing the bookings related to your user group. You are also the first point of contact for any users who experience difficulties with the platform. You also have responsibility to grant super user access and pass on super user support knowledge to another team member when you leave the College.

See below for a step by step on how to use Resource Booker, as well as key tips and how to support other users.
Logging in

To login, you need to visit the Resource Booker login page. You will not need to request access to login; simply use your staff credentials (email address and password).
Main menu options

When you login, you will see a variety of options on the left-hand side of the platform. See below for an overview of what each of these does.

- Make a booking: This is where you can view spaces and book one off or recurring slots.
- My bookings: This is where you can view a calendar of your own bookings, to see what you have coming up.
- Notifications: This area is for if a space has been approved for use. As this is not a process we have in place for hybrid working, you will not need to use it.
- Profile: This is where you can access your profile information. This is an important area to check if another user is having access issues, as it will show which user groups they belong to.
- Resources: You can use this area to book a resource, in the same way that you can through ‘make a booking’. You can also use this area to edit your own or a colleague’s booking if needed.
- User groups: This area is used by super users to add others to the right user groups, as well as maintaining departmental user groups. You’ll find more information about this under ‘adding and training a user’.
- Reports: This is where you can view and download a report on the usage of resources in your user group.
How to make a booking

Once logged in, you will see the following landing page, where the ‘make a booking’ screen will display:

The booking options will be presented as tiles, as above. You will see the following options:

- Hybrid working – book a hot desk (a hot desk can be used by any professional services team using Resource Booker for hybrid working)
- Hybrid working – book a meeting room
- Hybrid working – book a zoned desk (these are desks only used by specific user groups)

To make a booking:

1. Click on the booking tile for the type of booking you want to make
2. Once you click on this, a list of available resources will appear. The first 20 resources will show; keep clicking ‘show more results’ to see all resources. If you click on the information icon next to a resource (circled below), it will expand to show you more information about it, including location, and what hardware is available:

3. Once you’ve chosen a resource, click on it to open a calendar. This will show the availability and any existing bookings for this resource:
A note: If you click on someone else’s existing booking, you will be able to see more details about it, including who booked the resource, as below. If the booking has been made by a user in your user group, and a change needs to be made, as a super user you have the ability to edit it.
4. Click on the timeslot you want to reserve. This will bring up a booking screen:

On the booking form, you will need to:

- Enter a short, professional title for your booking. All users will be able to see your booking title and description
- Select whether it is a single or recurring booking*
- Add in the dates and times for the booking
- Tick the box to indicate if you are booking on behalf of a colleague. This will prompt you to input the colleague’s email address
- Once these details are added, click ‘book’

* With a recurring booking the form will be slightly different, as below. You will need to input how frequently you’d like these bookings to take place and when you want the recurring booking to end. As with a one-off booking, you will be able to edit a recurrent booking you have made – either a single occurrence, or the entire series.
The box below will then pop up to confirm your booking. You will be able to edit this booking if you need to:

5. Once this has been completed, you will be sent a booking confirmation via email. If you are booking on behalf of a colleague, they will also be sent the confirmation. The confirmation email will look as follows:
Notes on the booking process:

- If you try to create a recurring booking, but not all times are available during the period over which you’d like to book, the system will not let you book for that slot
- The filters section when searching for a resource is currently not working. Once resolved, users will be updated
- There is no approvals process, so if the time is available, your booking will be automatically accepted

How to cancel a booking

1. Click on your booking in the calendar, or via the link in your booking confirmation email, to open your booking
2. In the bottom right of your booking details, you will see a ‘cancel’ box:

3. A confirmation box will appear, as below. Once you confirm the cancellation, it will be removed from the calendar
4. You will then receive a cancellation confirmation email, as below:

Hybrid Working - Hot desk Bookings: Cancellation of Hot desk Booking

noreply.rooms@rhul.ac.uk

To: Rooms

15:32

The Hot desk booking detailed below has been cancelled and the Hot desk has now been released.

Booking Reference: RB2004023051-THO

Booking Title: test 2
Date(s): 22 Apr 2022
Day: Friday
Booking Starts: 06:45
Booking Ends: 08:00
Hot desk: CC Annex - Open plan space - Hot-desk 13

If you have valid credentials, you can view your booking here: https://rooms.test.royalholloway.ac.uk/#/app/booking-requests?id=7d854fd0c-90d5-b6fa-ceb2-548375b12a4
Editing rights

As noted above, super users can edit resources in their own user groups. If another user from your user group has made a booking, but a change needs to be made, a super user can do this. This can be done by opening the calendar booking, and clicking 'edit' in the bottom right:

User management

Super users have responsibility for maintaining the list of users in their user group, and making sure it is up to date. This means they will need to both remove and add new users. They are also the first point of call for anyone in their user group who is experiencing difficulties. Any issues should be taken to a user group’s super users, before being referred to IT.

Resource Booker support model

As a super user, you are the first line of support for any query another user in your user group has. If the query seems to be a user understanding issue, it is likely you will be able to resolve it. If it seems like a technical issue, it can be escalated to the IT service desk by logging a Service Desk ticket. It may also be a more complex technical query, which only the vendor (Resource Booker team) can resolve. The IT team would take this forward. Additionally, you may want to edit the
description/title of a resource – for example, if it has updated equipment, or is currently unavailable. These requests can also be sent to the IT service desk.

When you log a call with the IT service desk, make sure to include enough context. This includes any useful screenshots, and details on what has happened so far.

Index of user group configurations

It’s useful for a super user to know that user groups are configured differently. The table below displays a full list of user groups. Category A are configured using email claims, and category B are configured using group claims. If your group is in category A, you have extra responsibility to update your user groups; you will need to add and remove users yourself, using colleague’s email addresses. If you are in category B, your group configured by directory service group, and you will not need to do this.

Please see below a full list, and find your own group:

**Hybrid working – user groups**

The only difference between group A and group B is the claim type, meaning that user management is a different process for the super users, as outlined above.

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<thead>
<tr>
<th>User Group</th>
<th>Claim Type</th>
<th>Directory service group</th>
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<tbody>
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<td>A</td>
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<td>Hybrid working - Academic Quality and Policy</td>
<td>Email</td>
<td>N/A</td>
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<tr>
<td>Hybrid working - Careers</td>
<td>Email</td>
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<td>Hybrid working - Commercial Services</td>
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Hybrid working – super user groups

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Adding and training a user

Whilst all staff at the College can access Resource Booker using their regular university credentials, they will also need to be added to the correct ‘user group’ on the system in order to make bookings on hybrid resources allocated for their user group. A user group is defined as a logical grouping of users. For example, the Careers team is a user group, and the Library is a separate group.

To add a user to a group:

1. Click on ‘User groups’ in the left-hand main menu
2. You can then search for a user group that you would like someone added to:
3. Click on the user group you want to maintain, for example, ‘hybrid working – Super users – Careers’

4. When you click on the group, you will see a tab called ‘Claims’. This is where you can add another user:
5. Click ‘add a claim’. In this instance, ‘claim’ is being used instead of ‘user’.
6. You will be prompted to choose the type of ‘claim’ you want to add:

7. A super user can add another user, if their user group (for example, ‘Careers’) is configured using email addresses*. To do this, choose ‘email address’ from the dropdown list above, and add the email address to the box to the right. Please note: when inputting an email address, the first letters of the first name and surname must be capitalised, for example – Test.Test@rhul.ac.uk.

* Super users of those user groups configured using ‘group claims’ as opposed to email addresses will not need to add any new users. Please go to page 12 for a full index of user groups and how they are configured – you will be able to find your group here.

Once a user is setup, they may need support when first using the platform. It is a super user’s responsibility to train and support new users in their area.

A note: It is worth noting that if a user is added to another user group – their existing access will remain in place.
Adding another super user

As mentioned, a super user has responsibility to grant super user access and pass on super user support knowledge to another team member when leaving the College.

Super users can edit the super user list for their area. You can do this by:

1. Going to ‘user groups’ in the main menu to the left of the page
2. Clicking on the ‘permissions’ tab
3. Add the user’s email address as a ‘claim’:

Removing a user

When a colleague leaves, you may need to remove them from Resource Booker if your user group is configured using email claims. You can do this by:

1. Navigating to the ‘user group’ tab in the left-hand menu, and selecting the user group you need to remove a user from
2. Select the email address under the user group list, and click the delete icon, circled below:

3. A window will appear, asking you to confirm the deletion. Click ok:
After this, click ‘save’ in the bottom left of the screen. A green confirmation notification will appear at the top of the screen:

Supporting a user who needs access

A user in your user group may come to you to say that whilst they can login to Resource Booker, they cannot see any booking tiles on the homepage. This could be because they do not have the right user access. Here are the steps for investigating this issue:

- Ask the user to login, to go the ‘profile section’, and send you a screenshot of what they can see under ‘user profile info’:
- If the user group section is empty (section highlighted above), this indicates that they will need to be added to the right group. A user may also not be listed under the correct ‘directory service group’, which could be causing an issue.
- If the user needs to be added to a specific user group, this can be done using the steps above under ‘adding a user’.
- If a user is not listed under the correct ‘directory service group’ name, this will need to be logged as a ticket with the IT service desk.
  o When contacting IT, the super user should specify the name of the user, and what directory service group the user should be listed under.

Reports

Resource Booker can run simple reports for super users, which will show you how often a resource is being booked within a particular timeframe. You’ll only see resources which are in your user group.

When you navigate to the reports page, you will be able to create either a ‘booking’ report or an ‘audit’ report.

The bookings report will show you when a resource is booked within a particular timeframe. An audit report will show you all the actions that have been performed related to a resource booking. For example, when a zoned desk booking has been accepted, then the time of booking changed, it will show both of these actions. It is less likely you will need to use an audit report, particularly as there is no approval process related to hybrid working bookings.

Producing a report under the bookings tab
1. Under the bookings report tab, you can choose the particular resources you’d like included, to see their usage. Click ‘add’ next to the resource:

2. Using the timeframe box on the right-hand side, you can select the date range for which you’d like to see resource usage – this could be dates in the past, or upcoming:

3. After selecting the resources and timeframe, click next. This will show you the bookings within your timeframe for the resource. You can download this report as a CSV file.
4. This will produce a report which looks like this: