My accounts

Open another mailbox..

Sign out

Bloggs, Joseph

Configuring resource account scheduling options and permissions - A guide for room owners

About Resource accounts and owners

Members of University staff can schedule (book) rooms for meetings and other events using Outlook.

Each meeting room has a special Outlook **resource account** associated with it. This allows a meeting organiser to see all available rooms when creating meetings and to book a room by 'inviting' it to the meeting.

Each resource account has an **owner** who is responsible for configuring its scheduling options and permissions; these settings determine whether booking requests are processed automatically (by the resource) or manually (by the owner and/or delegate).

Note: If the resource account owner leaves the University, the account will be closed automatically unless an alternative owner is identified *before* they leave. Please notify the Service Desk of any change in ownership.

This fact sheet provides guidance for room owners on configuring resource account options. Only the IT Service Desk - servicedesk@abdn.ac.uk - can create resource accounts and assign ownership to staff members.

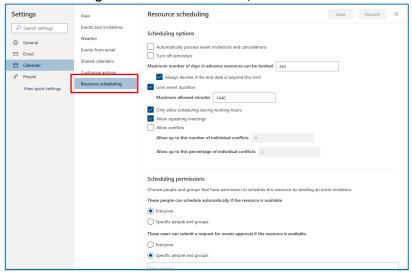
Access the resource mailbox

You will need to log in via **Outlook Web Access** to set booking request options for the resource account – it is not possible to configure the resource using Outlook.

- Open your web browser and go to http://outlook.com/abdn.ac.uk
 Note: We recommend using Internet Explorer to ensure full functionality.
- 2. Sign into your own email account.
- 3. Click on your photo icon on the top right of the screen and choose **Open another mailbox...** from the dropdown menu.
- 4. Type in the username for the resource account (e.g. xrs999) and select it from the automatic look up list.
- 5. Click **Open** at the prompt. The resource account will open in a separate browser window or tab.

Access resource scheduling settings

- 1. Make sure you are in the resource account window or tab, not your own account.
- 2. Click on the **Settings** icon at the top right of the screen and click **View all Outlook settings** at the bottom of the Quick Settings pane.
- 3. In the full Settings window select Calendar, and then Resource scheduling.



Configure resource scheduling settings

You can configure resource scheduling settings to handle incoming booking requests in different ways:

- **1. Fully automatic:** All booking requests are automatically accepted or declined by the resource account, based on availability.
- After initial configuration, no input is required from the room owner; the resource automatically processes
 all event invitations and cancellations.

OR

- **2. Fully moderated:** All booking requests must be approved (accepted) or denied (declined) by a person (delegate) manually.
- A moderated resource account must have at least one delegate associated with it this could be the
 resource account owner, or somebody else who has agreed to manage booking requests for the room. The
 delegate accepts or declines incoming booking requests in their own Outlook, just as they would for event
 invitations for their own calendar.

OR

- **3.** A combination of automatic and manual: All booking requests receive an automated response *initially*, based on availability:
- If the room is unavailable, requests are automatically declined.
- If the room is available, requests receive a *tentative* response *pending approval*; the requests must then be approved (accepted) or denied (declined) by a person (delegate) manually.

For guidelines on setting up each method, see:

Fully automatic pages 2-5, Fully moderated pages 6-10, Combined pages 11-12.

1. Fully automatic processing

1.1 Scheduling options

Access the resource mailbox and resource scheduling settings as described on page 1. The **scheduling options** are on the left of the screen.

- 1. Tick the checkbox next to Automatically process event invitations and cancellations.
- 2. Set the remaining scheduling options to suit.

Note: As the resource owner, it is up to you how you set the scheduling options. However, we have provided typical settings that we think will work for most room managers and which you may want to use initially, until you are more familiar with the setup.

Option	Overview	Typical setting
Turn off reminders	If you leave the option unchecked, meeting organisers and attendees will still receive reminders. Applies to the Resource account only.	Unchecked
Maximum number of days in advance resources can be booked	How far in advance the room can be booked. Valid values are between 0 (today) and 1080 (~3 years).	365 (1 year)
Always decline if the end date is beyond this limit	Leave checked to decline any meeting that is scheduled beyond the maximum number of days set above.	Checked
Limit event duration	Set maximum permitted duration of a meeting within a single day. If you don't switch this on, there will be no limit. Valid values are between 0-1440 minutes (24hrs).	Checked and set to 1440
Allow scheduling only during working hours	If you leave this checked, the room can only be booked during the Resource's Work Week. (You set the Resource's Work Week via calendar settings – see Appendix 2).	Unchecked
Allow repeating meetings	Allow or prevent recurring meetings.	Checked
Allow conflicts	Allow or prevent double bookings.	Unchecked

1.2 Scheduling permissions

The **scheduling permissions** are listed as three options on the right of the screen. For each option, you can choose either 'Everyone' or you can specify individuals or groups.

1. For fully automatic processing of booking requests, set the permissions as indicated below:

Permission option and overview		What the meeting organiser receives in their Inbox	
These people can schedule automatically if the resource is available. • Everyone Specific people and groups:		All meeting organisers (users) will receive an automated reply from the resource account. Depending on availability, this will either say Your request was accepted OR Your request was declined because there are conflicts	
Select one or more All users can book the room outright, if available, wit	hout your	TIP: You can add a customised Response Message to go with the auto-reply. Instructions are provided in Appendix 1, below.	
approval.			
OR		OR	
These people can schedule automatically if the resource is available. Everyone		Any meeting organiser (user) you have specified will receive an automated reply from the resource account. Depending on availability, this will either say Your request was accepted <i>OR</i> Your request was declined because there are conflicts	
Specific people and groups:			
Mackenzie, Christine, Stephen, Linda J.		Anyone else trying to book the room will receive and automated message from the resource account saying Your event invitation was declined. You don't have permission to book this resource.	
You specify the people or groups of people who can book the room outright, if available, without your approval			
This allows you to name trusted individuals who can book the room without needing your intervention.		TIP: You can add a customised Response Message to go with the auto-reply. Instructions are provided in Appendix 1, below.	
TIP: Instructions on selecting users & groups are prov	ided below.		
These users can submit a request for owner approval if the resource is available.		This option is not part of fully automatic processing.	
Everyone			
Specific people and groups:			
Select one or more			
These people or groups can schedule automatically if the resource is available and can submit a request for owner approval if the resource is unavailable. Everyone Specific people and groups: Select one or more		This option is not part of fully automatic processing.	

Note: When you choose to automatically process event invitations, *all* requests and cancellations will go directly into the resource account's **Deleted Items** folder, not the Inbox. This is expected behaviour because if you allow the resource to manage its own bookings, no input is expected from the room owner.

1.3 How to select specific people and groups

Add users

1. Click the **Specific people and groups** radio button, and then click on **Select one or more...** to open the search window.

Note: If you see a blank window, close it and try again.

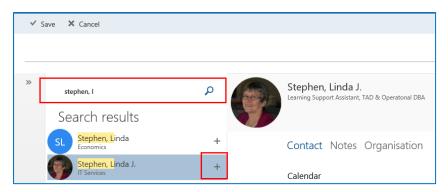
By default, the search window that opens looks in **All Contacts**. If you have more than one Contacts folder, it is possible to specify which folder you want to search.



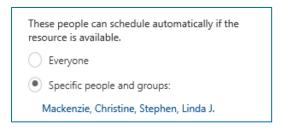
• Click on the chevron icon to display a list of Contacts folders on the left, then click on the folder you want to search.



- 2. Type the name (first or last) of the person you want to find into the search box then press the Enter key or click on the magnifying glass icon.
- 3. Once you've located the person, click the + sign beside their name, or double-click on their name to add them.



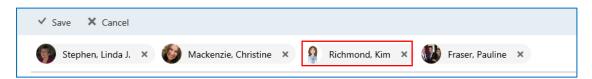
- 4. Continue to add as people as required. Once you have added all the people you want, click **Save** at the top left of the search window.
- 5. You will see the list of users you have selected to have that particular permission:



Remove users

If at any time you want to remove users:

- 1. Click once on the users and groups you added to open the search window again. **Note:** If you see a blank window, close it and try again.
- 2. In the **Top** bar, at the top left of the search page, click on **X** next to the name you want to remove:



- 3. If you want to remove more than one name, repeat step 2.
- 4. When you are finished, click **Save** at the top left of the search window to save your changes.

1.4 Save your Automatic Processing settings

1. Once you have set the scheduling options, permissions and, if required, response message to suit, click **Save** at the top left of the resource scheduling settings window.



- Remember, you can return to edit these settings at any time if required.
- 2. **Close** the resource account browser window or tab.
- 3. **Sign out** of your own account from the top right of the screen.

Note: If you sign out of the resource account this will automatically sign you out of your own account too.

1.5 Handling incoming requests

When you configure your resource account to automatically process requests, as described above, event invitations and cancellations are automatically accepted or declined by the account, based on availability.

Meeting organisers receive automated replies from the resource account.

After initial configuration, no further input is required from the room owner other than updates or changes to scheduling permissions (and, if used, your automated response message), and occasional monitoring.

2. Configure fully moderated processing settings

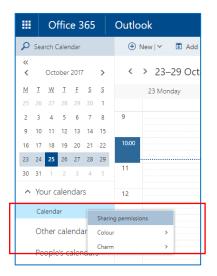
When a room is set up as a fully moderated resource, all booking requests need to be approved (accepted) or denied (declined) by a person (delegate) *manually*.

The account must have at least one delegate associated with it. This should be the resource account owner. It is possible to have more than one delegate if required, e.g. if the owner is on vacation, this would allow someone else to handle booking requests.

Note: The account owner is not automatically a delegate. If you are an account owner, and you want to process booking requests manually, you must set yourself up as a delegate.

2.1 Set up delegates

- 1. Access the resource account as described on page 1.
- 2. Click on the app launcher at the top of the screen and choose Calendar.
- 3. On the left of the screen, under Your calendars, right-click on **Calendar** and select **Sharing permissions** from the pop-up menu:



Share

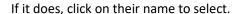
Share this calendar: Calendar

Send a sharing invitation in email.

Search Directory

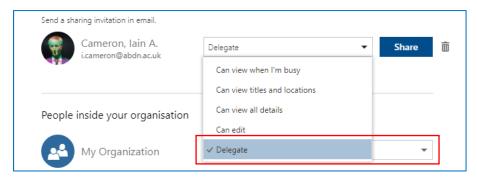
- 4. The Share this calendar: Calendar pane opens on the right of the screen.
- 5. In the **Send a sharing invitation in email** text box, start typing the first or last name of the person you want to be a delegate for the resource account.

If the person is already in your contacts, their name may pop up automatically as you start to type.



If the person is not already in your contacts, then select their name from the pop-up list of results.

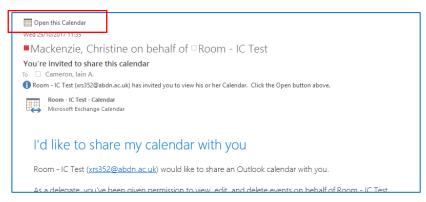
6. Select **Delegate** from the drop down list of access level options:



7. Click Share



- 8. This will send an email message from the resource account to the delegate, inviting them to be a delegate and to share the room Calendar.
 - The delegate should click on the **Open this Calendar** button on the message toolbar to access the resource Calendar and Inbox.



9. If you want to add more than one delegate, repeat steps 5-7 for each.

Don't forget: As room owner, you must also be a delegate, so make sure you add yourself.

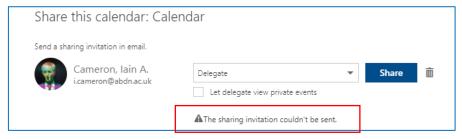
10. Click **Done** when you are finished.





Steps 5-10 not working as described?

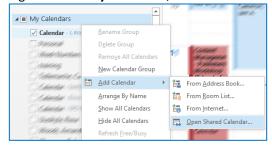
Occasionally, after selecting an individual, assigning Delegate access, and clicking **Share**, you'll see the error message **The sharing invitation couldn't be sent**, as shown below:



This is an Office 365 bug. If it happens to you, ignore the message and click **Done**, as in step 10 above.

The individual **will** have been given delegate access to the resource account, however they **will not** receive an email inviting them to share the room Calendar. Instead, they will have to access the room calendar manually as follows.

- The new delegate should open their Outlook Calendar (in the Outlook desktop application).
- Right-click on My Calendars, select Add Calendar, then Open Shared Calendar.



 Type in the username for the resource account (e.g. xrs999), and click **OK**.





2.2 Scheduling options

Access the resource mailbox and resource scheduling settings as described on page 1. The **scheduling options** are on the left of the screen.

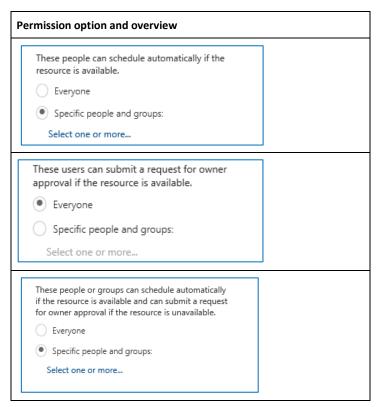
1. Make sure the checkbox next to Automatically process event invitations and cancellations is NOT ticked.

Note: Although the remaining settings listed under **scheduling options** on the left of the screen (including the Response Message) *look* as if they are still available, they will no longer take effect.

2.3 Scheduling permissions

The **scheduling permissions** are listed as three options on the right of the screen. For each option, you can choose either 'Everyone' or you can specify individuals or groups.

1. As all requests to book the room will be processed manually by the Delegate, the permissions should be set as follows:



2.4 Save your fully moderated processing settings

Once you have set the scheduling options and permissions, click **Save**. Remember, you can return to edit these settings at any time if required.



2.5 Handling incoming requests

When a room is set up as a fully moderated resource in this way, booking requests must be approved (accepted) or denied (declined) by an assigned delegate.

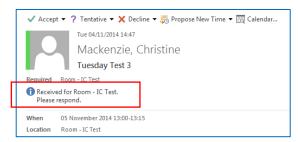
All requests and cancellations will come to the delegate's own Inbox and can be accepted or declined from there.

Note: It is possible to create an Outlook Rule so that all booking requests for the room are filtered into a separate folder, helping to keep the delegate's Inbox tidy. **The room owner (or delegate) must, however, get into the habit of checking the folder at least once a day to make sure they don't miss any requests. See** *Creating an Outlook Rule to filter incoming booking requests* **on page 9 below for guidelines.**

The delegate can also view the resource's calendar to check room availability if required. The resource calendar will be listed under the delegate's Shared Calendars and can be opened from there.

The Process

- 1. The meeting organiser creates a meeting, invites delegates, adds the room (resource), and sends a booking request.
 - They will not receive a response until the delegate processes their request.
- 2. The booking request is sent to the delegate's Inbox.
- 3. Until the delegate has responded, the meeting organiser must consider the room booking 'Tentative'.
- 4. The delegate must **respond**, approving or declining the request, as appropriate.
 - If the delegate wants, they can add a response message by clicking on the drop-down arrow next to their response choice and selecting **Edit the Response before Sending**:



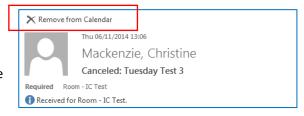


- 5. Once the delegate has responded, the booking request email will disappear from their Inbox.
- 6. The meeting organiser will receive an email reflecting the delegate's response see examples below:





- If the delegate has accepted, the room booking is considered confirmed.
- If the delegate had declined, the room booking is rejected and the meeting organiser must reschedule, and remove the meeting from their calendar.
- If the meeting organiser subsequently cancels the booking request, the delegate will receive an email reflecting this.
- 8. The delegate should click **Remove from Calendar** to free up the room for other meeting organisers who may want to use it.

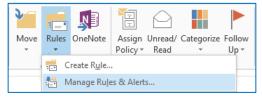


Creating an Outlook Rule to filter incoming booking requests

Delegates can, if they want, create an Outlook Rule to filter all resource account booking requests into a separate folder, and so help to keep their Inbox tidy. If a delegate looks after more than one resource account, they can create a separate rule for each.

To create the Rule, the delegate should be logged into their own Outlook.

- 1. Select Mail from the Navigation Pane in the bottom left of Outlook's window.
- Click on the Home tab and, from the Move group, click on Rules > Manage Rules & Alerts...



- 3. In the Rules and Alerts dialog, click on New Rule...
- 4. Under Start from a blank rule, click Apply rule on messages I receive, then click Next >



The Rules Wizard dialog opens.

- 5. Under Which condition(s) do you want to check? Step 1: Select condition(s)
 - Tick the checkbox
 with specific words in the message header
 - Tick the checkbox
 which is a meeting invitation or update

At the foot of this dialog, under **Step 2: Edit the rule description** (click an underlined value)

- Click on the blue underlined text specific words
- In the Search Text dialog, type the following text into the first text box:

X-MS-Exchange-Inbox-Rules-Loop: xrs123@abdn.ac.uk

replacing xrs123 with the resource account ID and making sure there is a space between the colon and the resource account ID

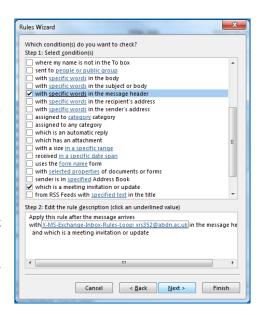
- Click Add then OK
- 6. Click Next >
- 7. Under What do you want to do with the message? Step 1: Select action(s)
 - Tick the checkbox move it to the specified folder

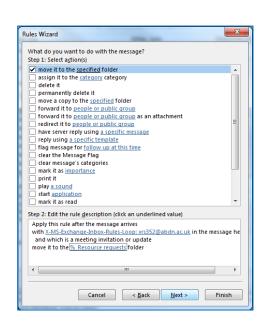
At the foot of this dialog, under **Step 2: Edit the rule** description (click an underlined value)

- Click on the blue underlined text <u>specified folder</u>
- Either choose an existing folder, or create a New folder from within the dialog
- Click OK
- 8. Click Next >
- 9. Under Are there any exceptions?
 - You do not need to apply any exceptions
 - Click Next >
- 10. Give your rule an appropriate name, e.g. Resource xrs123 Requests
- 11. Click Finish, Apply and OK



Rule not working? Some resource accounts have been set up with the naming convention **xrs-123** (with a dash) instead of **xrs123** (without a dash). At step 5 above, try typing the resource account ID in the format **xrs-123@abdn.ac.uk** instead.





3. Combination of automated and manual processing

3.1 Scheduling options

Access the resource mailbox and resource scheduling settings as described on page 1. The **scheduling options** are on the left of the screen.

- 1. Tick the checkbox next to Automatically process event invitations and cancellations.
- 2. Set the remaining scheduling options to suit.

Note: As the resource owner, it is up to you how you set the scheduling options. However, we have provided typical settings that we think will work for most room managers and which you may want to use initially, until you are more familiar with the setup.

Option	Overview	Typical setting
Turn off reminders	If you leave the option unchecked, meeting organisers and attendees will still receive reminders. Applies to the Resource account only.	Unchecked
Maximum number of days in advance resources can be booked	How far in advance the room can be booked. Valid values are between 0 (today) and 1080 (~3 years).	365 (1 year)
Always decline if the end date is beyond this limit	Leave checked to decline any meeting that is scheduled beyond the maximum number of days set above.	Checked
Limit event duration	Set maximum permitted duration of a meeting within a single day. If you don't switch this on, there will be no limit. Valid values are between 0-1440 minutes (24hrs).	Checked and set to 1440
Allow scheduling only during working hours		
Allow repeating meetings	Allow or prevent recurring meetings.	Checked
Allow conflicts	Allow or prevent double bookings.	Unchecked

3.2 Scheduling permissions

The **scheduling permissions** are listed as three options on the right of the screen.

1. Set the permissions as indicated below:

Permission option and overview	What the meeting organiser receives in their Inbox
These people can schedule automatically if the resource is available.	This option is not part of combined processing.
Everyone	
Specific people and groups:	
Select one or more	
These users can submit a request for owner	If the room is available:
approval if the resource is available.	All meeting organisers (users) will receive a tentative,
Everyone	automated reply from the resource account saying
Specific people and groups:	Your request was received and is pending approval As room owner (or delegate) you must then manually
Select one or more	accept or decline the meeting.
	If the room is unavailable:
All users can send a booking request to the room owner fapproval.	All meeting organisers (users) will receive an automated reply from the resource account saying Your request was declined because there are conflicts
	Details of the conflicting meeting and its organiser are also displayed in this reply.

These people or groups can schedule automatically if the resource is available and can submit a request for owner approval if the resource is unavailable.	This option is not part of combined processing.
Everyone	
Specific people and groups:	
Select one or more	

3.3 Save your Automatic Processing settings

1. Once you have set the scheduling options and permissions to suit, click **Save** at the top left of the resource options window.



Remember, you can return to edit these settings at any time if required.

- 2. Close the resource account browser window or tab.
- 3. **Sign out** of your own account from the top right of the screen.

Note: If you sign out of the resource account this will automatically sign you out of your own account too.

After initial configuration, no further input is required from the room owner other than updates or changes to scheduling permissions (and, if used, your automated response message), and occasional monitoring.

3.4 Handling incoming requests

When you configure your resource account as described above, all event invitations are *initially* handled automatically. The way in which they are *subsequently* handled depends on availability.

If the room is available:

- All meeting organisers (users) will receive an automated tentative reply from the resource account saying: Your request was received and is pending approval
- All requests will come to the room owner or delegate's own Inbox.
- The room owner (or delegate) must then manually accept or decline the meeting.

Note: It is possible to create an Outlook Rule so that all booking requests for the room are filtered into a separate folder, helping to keep the delegate's Inbox tidy. **The room owner (or delegate) must, however, get into the habit of checking the folder at least once a day to make sure they don't miss any requests.** See <u>Creating an Outlook Rule to filter incoming booking requests</u> on page 9 for guidelines.

If the room is unavailable:

- All meeting organisers (users) will receive an automated reply from the resource account saying:
 Your request was declined because there are conflicts
- Details of the conflicting meeting and its organiser are also displayed in this reply.

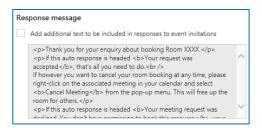
Appendix 1: Add a customised message to automatically processed requests

As part of the **fully automatic**¹ processing method, all meeting organisers will receive an automated reply from the resource account saying either 'Your request was accepted', or 'Your event invitation was declined. You don't have permission to book this resource', or 'Your request was declined because there are conflicts', depending on the scheduling permissions you have set.

If you want, you can add a customised message to this automated reply. This is useful if you want to provide more information about the room – for example what facilities, if any, are in it.

Add a message

- 1. Access the resource scheduling settings window as described on page 1 above.
- At the foot of the window, tick the checkbox next to Add additional text to be included in responses to event invitations.
- 3. Type in the text you want to include.



Note: If you choose to add a response, this message will be displayed whether the request has been approved or declined – it is not possible to set a different message for each type of response. It is, however, possible to customise your message to suit both types. For example:

Thank you for your enquiry about booking Room XXXX.

If this auto response is headed 'Your request was accepted', that's all you need to do.

If however you want to cancel your room booking at any time, please right-click on the associated meeting in your calendar and select 'Cancel Meeting' from the pop-up menu. This will free up the room for others.

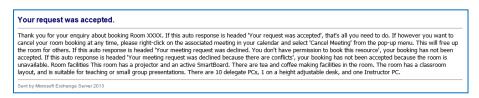
If this auto response is headed 'Your meeting request was declined. You don't have permission to book this resource', your booking has not been accepted.

If this auto response is headed 'Your meeting request was declined because there are conflicts', your booking has not been accepted because the room is unavailable.

Room facilities

This room has a projector and an active SmartBoard. There are tea and coffee making facilities in the room. The room has a classroom layout, and is suitable for teaching or small group presentations. There are 10 delegate PCs, 1 on a height adjustable desk, and one Instructor PC.

4. By default, the automated Response Message is *not* formatted when it arrives in the meeting organiser's Inbox. Any line breaks you inserted when creating the message are ignored and the message is displayed in a single paragraph:



It is possible to format your message using simple html tags so that it is easier for the meeting organiser to read. If you would like to know how to do this, see below.

¹ If you have configured your resource to be **fully moderated**, the customised Response Message option will **not** work.

Formatting your message

You can format your Response Message using simple html tags.

Most html tags come in pairs – an opening tag and a closing tag.

The opening tag comes immediately before the text you want to format, and the closing tag immediately after. There is no space between the tag and the text you want to format.

Common tags include:

<h3>The h3 tags denote the start and end of a level 3 heading</h3>

The p tags denote the start and end of new paragraph.

The b tags denote the start and end of bold text.

The i tags denote the <i>start and end</i> of italicised text.

Unlike the other tags, the br tag is used singly.

It indicates where a line break should occur. Note that in this tag, there is a single space between br and /.

So to achieve this formatting, for example:

Your request was accepted.

Thank you for your enquiry about booking Room XXXX.

If this auto response is headed Your request was accepted, that's all you need to do.

If however you want to cancel your room booking at any time, please right-click on the associated meeting in your calendar and select Cancel Meeting from the pop-up menu. This will free up the room for others.

If this auto response is headed Your meeting request was declined. You don't have permission to book this resource, your booking has not been accepted.

If this auto response is headed **Your meeting request was declined because there are conflicts**, your booking has not been accepted because the room is unavailable.

Room facilities

This room has a projector and an active SmartBoard. There are tea and coffee making facilities in the room. The room has a classroom layout, and is suitable for teaching or small group presentations. There are 10 delegate PCs, 1 on a height adjustable desk, and one Instructor PC.

Sent by Microsoft Exchange Server 2013

you would use these tags.

Thank you for your enquiry about booking Room XXXX.
If this auto response is headed Your request was accepted, that's all you need to do.

If however you want to cancel your room booking at any time, please right-click on the associated meeting in your calendar and select Cancel Meeting from the pop-up menu. This will free up the room for others.

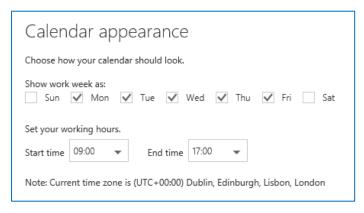
If this auto response is headed Your meeting request was declined. You don't have permission to book this resource, your booking has not been accepted.If this auto response is headed Your meeting request was declined because there are conflicts, your booking has not been accepted because the room is unavailable.<h3>Room facilities</h3>

This room has a projector and an active SmartBoard. There are tea and coffee making facilities in the room. The room has a classroom layout, and is suitable for teaching or small group presentations. There are 10 delegate PCs, 1 on a height adjustable desk, and one Instructor PC.

Appendix 2: Set the Resource's Work Week

If you want, you can specify the days of the week and the times the resource can be booked.

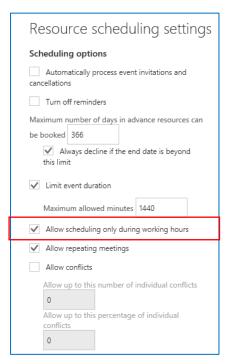
- 1. Access the resource mailbox and resource scheduling settings as described on page 1 above.
- 2. Make sure you are in the resource account window or tab, not your own account.
- 3. Click on the **Settings** icon at the top right of the screen. From the **Settings** pane, under **Your app settings**, select **Calendar**. Close the Settings pane again by clicking the **X** on the top right.
- 4. From the Options menu on the left of the screen, under Calendar, select Calendar appearance
- 5. Under **Calendar appearance**, choose the days and hours you want the resource to be available. For example, you may only want the room to be available Monday-Friday, 09:00-17:00



6. Once you have set the calendar appearance, click **Save** at the top left of the window.



- 7. Still in the options window, click Resource scheduling.
- 8. Under scheduling options, tick the checkbox next to Allow scheduling only during working hours.



9. Click **Save** at the top left of the window.