

## 1 Overview

Our reservation system was created using Booked Scheduler. Booked is an open-source program written in PHP Smarty for scheduling. By using an open-source program, we were able to customize the reservation system to fit our needs. To use the reservation system, there will always be a two-step authentication process. When you navigate to the webpage ([zeos.ling.washington.edu/booked](http://zeos.ling.washington.edu/booked)), you will first need to authenticate using your UW NetID and password, unless you are already logged into your UW account. Once you navigate to the webpage, you then have to log into the reservation system.

## 2 Registration

If it is your first time logging into the reservation system, you will first need to register. After you register, you will be able to log in and access any resource that you have permission for. You won't have immediate access to any resources because an administrator has to assign you to a lab group. To register an account, you will click on the "Create an Account" link on the login page. The following fields are required:

1. **Username:** This will be your UW NetID
2. **Password:**
3. **Confirm Password:**
4. **First Name:**
5. **Last Name:**
6. **Email:** Your UW email

You have the option of adding a phone number, organization, and position, but they are not required fields.

After completing the required fields, click register. After you register, you will be brought to the home screen (the Dashboard). You will notice that you cannot see any equipment—this is supposed to happen. After you register, an administrator needs to adjust your permissions and group membership. Please allow the administrator(s) time to do so.

## 3 Login

Every time you visit the reservation system after registering, you will need to login. On the login screen, you will need to type your **Username or Email** and your **Password**. (Fun note: you can also change the language in the dropdown box, but you must do this before logging in.) After inputting your credentials, click "login". This will bring you to the dashboard.

## 4 Notification preferences

Before you begin reserving equipment, be sure to set your notification preferences. These preferences allow you to receive an email in case you want to be informed when reservations are created, changed, deleted, approved. We suggest at a minimum you turn on notifications when reservations are created and when they are approved.

To set or change your notification preferences, click on "My Account" and "Notification Preferences". Change the settings according to your needs and click "update".

## 5 User profile

A user can view their account profile by going to “My Account” and “Profile”. From here, you can change the Default Homepage. You can set the default homepage as My Dashboard, Bookings, My Calendar, Resource Calendar. Only administrators can change the other profile settings. If something needs to be changed, contact an administrator.

## 6 Dashboard: the main screen

The Dashboard is the default page of the system. The three main sections of the Dashboard page are “**Announcements**, **Upcoming Reservations**, and **Resource Availability**”. Clicking on these links will show or hide the information underneath them.

**Announcements:** Information to all users. Any announcements for the specific labs regarding equipment reservations will be located here. The announcement will be preceded by the corresponding lab in bold font.

**Upcoming Reservations:** Your upcoming reservations.

**Resource Availability:** All resources you have access to. If you hover over the listed resource name, an information screen will pop up. This information screen includes important information about the equipment, the reservation limits, and whether the equipment requires approval.

## 7 Schedule Views

There are three different schedule views that you can access with the “Schedule” menu in the menu bar: Bookings, My Calendar, Resource Calendar. My Calendar will provide an overview of your own reservations. To view a single resource, use the Change Calendar drop down menu, and select the resource you would like to view. Resource Calendar will provide an overview of all reservations (not just your own). Similarly, using the Change Calendar drop down menu will allow you to select only one resource. For both calendar views, you can get daily or weekly views by clicking on the buttons Today or week. The Bookings schedule shows reservations by day, broken into hour time slots, which makes it the easiest method for creating reservations. The bookings page will show you the available, reserved, and blocked slots on the schedule.

The following colors are used:

White: Reservable time slots

Pink: Unreservable set by administrator

Blue: Space reserved by another user.

Teal: Your own reservations

Yellow/Orange?: Pending reservation

Grey: Past time - cannot make a reservation

### 7.1 Resource filter: view only one resource

If you need an overview of the schedule for only one resource, you can set a filter so that all other resources are hidden. We will do this on the bookings page.

First, if you have access to more than one group, i.e. if you are a member of both the phonetics and sociolinguistics labs, you may need to change the schedule displayed. This can be done by using the blue drop-down button next to the current schedule. At the left, there is a Resource Filter panel. Use the drop down menu to select the resource schedule you wish to see. If you want to reset the filter, click Clear Filter.

## 7.2 Resource filter: view by resource type

You can also get an overview of resources by type. For example, recorders, computers, microphones are all resource types. Click on the drop down menu under the Resource Type label and select the type of resource you want.

To reset the filter, click Clear Filter.

## 8 Create a reservation

There are different ways to make a reservation. On the Dashboard, you can click ‘Create Reservation’, but the list of equipment is quite long, and ensuring that you have clicked the correct link might be troublesome. Instead, the easiest method is going to the “Schedule” menu and clicking on “Bookings”.

Select the schedule you need (if applicable) by using the drop-down button. Find the resource, date, and time you’d like to book. Clicking on the time slot will allow you to change the details of the reservation.

Check/change the date and time to your needs and fill in the appropriate information, such as “Title of reservation” and “Description of Reservation”. In the title box, write the name of the equipment. In the description box, write down the name of any non-equipment accessories (such as an XLR cable). If you do not need any extra accessories, you can leave the description box blank.

### 8.1 Multiple resources

You can book more than one piece of equipment as part of a single reservation. To add more pieces of equipment to your reservation, click on the [More Resources](#) link, which is next to the name of the primary resource you reserved. Select the equipment you wish to add and click “Done”.

Clicking the create button will check availability and book the resource(s). You’ll be given a reference number, but you don’t need to use it. Close this information panel.

You’re finished!

## 9 Change/Update a reservation

To change or update a reservation page, click on the reservation either under “Upcoming Reservations” on the Dashboard or on the reservation on the Bookings page. The Edit Reservation panel will open. After making changes, be sure to click on update, otherwise your updates won’t be saved.

## 10 Delete a reservation

To delete a reservation, click on it in the bookings page. When the Edit Reservation panel opens, click on the delete button, located in the bottom left corner. Keep in mind that there is no way to undo this action.

Note: Clicking cancel does not delete a reservation. It simply closes the reservation window without saving any changes.

## 11 Pending reservations

Field equipment, such as recorders, button boxes, and the iPad set up, needs approval by an administrator. You can check to see if a reservation needs approval by hovering over a resource on the Dashboard or on the Bookings page. If a reservation needs approval, you will see “Reservation must be approved”.

After creating a reservation that needs approval, you will see a message pop up that tells you your reservation was created and that it requires approval.

If you look on the bookings page, your reservation is colored as a Pending reservation (Yellow/Orange). After the approval of the reservation by an administrator, the reservation turns to Reserved (teal).

## 12 Reservation protocol and policies

Reserving equipment is a two-step process. The first step is planning for your reservation using the reservation system above. The system is set up so that your reservation must be made 24 hours in advance. Make sure that you give yourself plenty of time, especially if you are taking field equipment because field equipment requires approval.

The second step will be to sign the equipment out when you take it and in when you return it. You will do this using paper check-out/check-in sheet that is attached to the key for the cabinet. This second step is necessary for inventory control.