

1 Resources in Office 365

A Resource account is an object in the Outlook Calendar that represents a room or a piece of equipment. These room resources are typically small conference rooms belonging to departments.

Resources in Office 365 will be limited, as the ITU encourages users to migrate space calendars to **25Live**, Mason's centralized space scheduling system. Additional information on 25Live may be found on the scheduling website, <http://scheduling.gmu.edu/25live/>. Classrooms, event spaces, and other shared conference rooms shall be scheduled via the 25Live system.

This guide contains instructions for the lifecycle management of resources in Office 365 including the following:

Action	Overview	Responsibility
Resource Creation	Initial creation of the resource in the system including naming and ownership	System Administrator
Resource Access	Opening and viewing the resource	Resource Owner
Resource Configuration (Set-up)	Setting resource behavior and scheduling rules	Resource Owner
Resource Delegation	Providing special access to others to act on behalf of the resource	Resource Owner
Resource Scheduling	Scheduling the resource through various methods	Anyone given access

2 Resource Creation

Responsibility – System Administrator

The Office 365 System Administrator handles the creation of resources. A resource request form <link forthcoming> contains the following information required to request the resource:

1. **Resource Owner** – who will be the primary point of contact for the resource
2. **Address Book Visibility** (yes or no) – Will it be visible to users to select it from the address book. Note, this does not mean everyone can schedule the room

3. **Full Access Staff** - Who can open the resource mailbox (not just the calendar) and act on its behalf – set up rules, behaviors, assign delegates, etc.
Send on Behalf Staff– Who can send mail from the account if someone needs to send a message

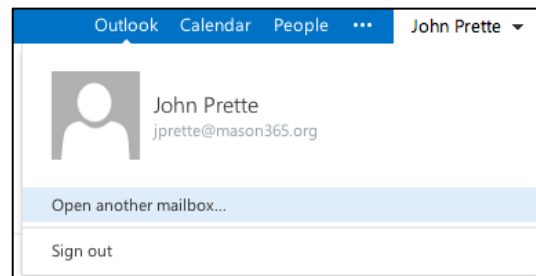
3 Resource Access

Responsibility – Resource Owner (Full Access)

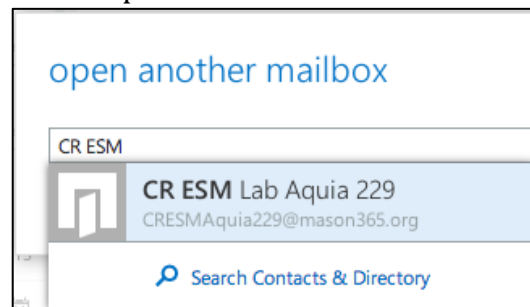
3.1 Access the account via OWA

The following instructions are provided for opening a resource account using the OWA client, <http://office365.gmu.edu>. **You must have FULL ACCESS to the resource account to open it in OWA.**

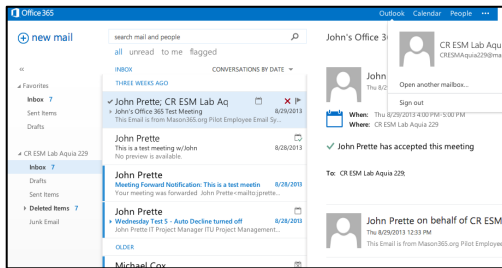
1. Navigate to the Office 365 login page at <http://office365.gmu.edu> → Login to 365 button
2. Login to your Office 365 account as you normally do
3. Click your name in the top right corner to see the options. Select “Open another mailbox...” from the list



4. Enter the resource name (or e-mail address if resource is not in the global address list) in the “open another mailbox” field.



- Click “Open” to open the account for the resource



- The resource account will open in a new browser tab.
- When finished working with the resource, just close the browser tab. Clicking sign out will actually sign you out of your personal account as well.

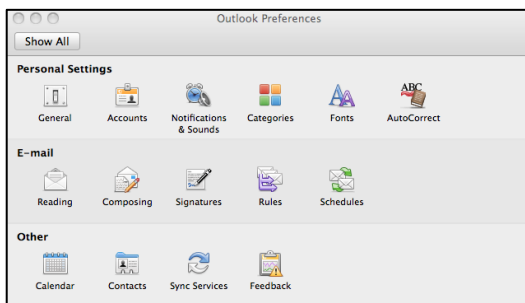
Once logged in, depending on the access provided, you may:

- Accept meeting invitations if necessary
- Send email messages
- Create, modify meeting requests sent from the resource

3.2 Access via Outlook 2011 for Mac

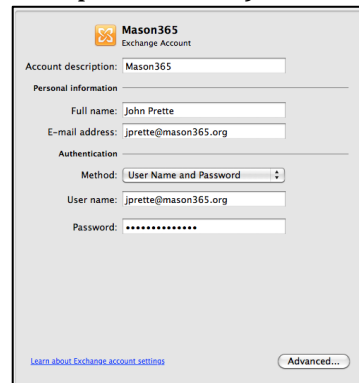
Adding the resource account to the Outlook for Mac configuration is similar to adding a delegate to the account.

- Open Outlook for Mac
- Select Outlook → Preferences from the menu list

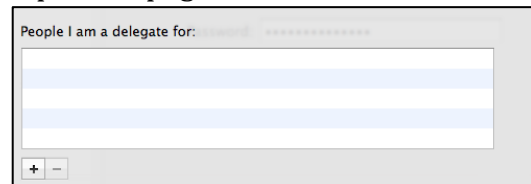


- Select “Accounts” from the Outlook Preferences Options
- Select the account that has Full Access rights to the Resource (typically this would be the individual’s account; however, the

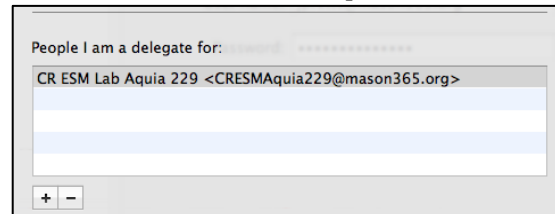
individual may have more than one account set-up in Outlook)



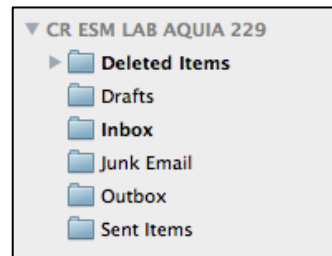
- Select the “Advanced...” button in the bottom right corner
- Choose Delegates from the choices at the top of the page



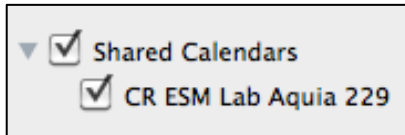
- Click the “+” to add a delegate to the “People I am a delegate for” list
- Enter in the information for the Resource and select OK to add the person to the list



- Click OK to save the changes
- Click the red “x” to exit out of the Preferences area
- The resource account will now show in the left column with the other mailboxes



- To send an e-mail on behalf of the resource (assuming permission to do so has been granted), select the new e-mail button and make sure that the From address has the correct one selected
- Navigate to the Calendar. The Resource calendar will show up in a “Shared Calendar” list.

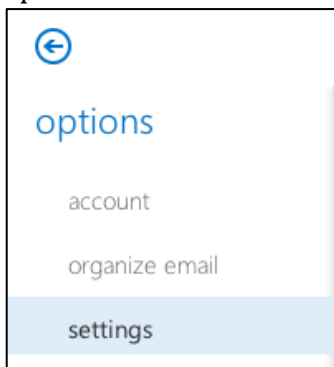


- To display the calendar, check the box next to the name. To hide it from view, merely deselect the box

4 Resource Configuration

4.1 Resource Settings and Behavior

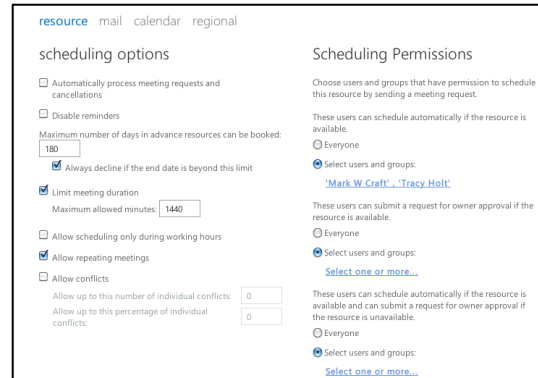
- Log into the Resource Account using the steps outlined in [Section 3.1](#)
- Click **on the Settings Icon (⚙️)** in the top right corner next to the resource name
- Choose “Options” from the drop down list.
- Click on **Settings** from the left menu options



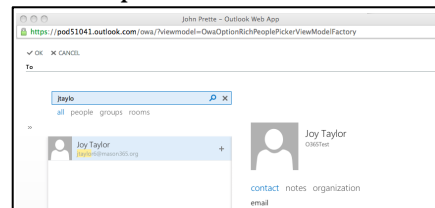
- Select Resource from list at the top (default is Resource)



- Configure the **Scheduling Options** and **Scheduling Permissions** as shown. Use the chart below to assist with option selections



- Update the Scheduling Permissions – click on the user name or “Select one or more...” link to open the address book



- To add multiple people, select them one at a time and when they are found in the list, click on the plus (+) sign to the right of the name to add to the “To” list.
- When all the people are added, click “OK” to save the list

4.1.1 Scheduling Options Overview

The following options are available for the setup of the resource account in Office 365. Typical values are shown to assist with the setup:

Option	Overview / Options	Typical Value
Automatically process meeting requests and cancellations	When checked (enabled), the mailbox will determine whether the requester can schedule the room and responds automatically to the invitation	Checked
Disable Reminders	Leaving this default leaves reminders for the resource turned off. You may change this default if you wish to receive reminders about the meetings that are scheduled for the resource.	Checked
Maximum number of days in advance resources can be booked	Designates how far out the room may be booked. Valid values are between 0(today) and 1080 (about 3 years).	366 (1 year)

Option	Overview / Options	Typical Value
Always decline if the end date is beyond this limit	Leaving the default setting means the resource will decline any meeting or series that is scheduled beyond the maximum number of days. If you disable this setting, any recurrences of a series occurring prior to the max days will be accepted and any after the date will be rejected.	Checked (Enabled)
Limit meeting duration and Maximum allowed minutes	The maximum duration of a meeting within a single day. Unchecking the box will mean a meeting has no limit. Checking the box allows for a limit between 0 – 1440.	Checked and the limit be set to 1440 minutes (24 hrs)
Allow scheduling only during working hours	Whether meetings scheduled outside of the resource's working hours will be accepted or declined. (see the general preferences section for how to define work hours)	Unchecked – able to schedule at all times
Allow repeating meetings	Allow or prevent repeating meetings for the resource. (also known as “recurring”)	Checked - recurring meetings are allowed
Allow Conflicts	Allow or prevent conflicting meeting requests (“Double Booking”)	Unchecked - to prevent conflicts
Allow up to this number of individual conflicts	When Allow repeating meetings is enabled, this setting specifies the maximum number of conflicts that are allowed for new repeating meeting requests.	Zero (0) by default as the above is disabled
Allow up to this percentage of individual conflicts	When Allow repeating meetings is enabled, this setting specifies the maximum percentage of meeting conflicts that are allowed for new repeating meeting requests.	Zero (0) by default as the above is disabled

4.1.2 Resource Permissions Overview

The following roles have the ability to schedule events WITH the room as the resource (scheduling privileges)

Scheduling Permission	Overview / Options	Recommend / Default
These users can schedule automatically if the resource is available.	<p>Everyone: Everyone in Mason's address book can automatically reserve the resource.</p> <p>Select users and groups: Only the specified users and groups can automatically reserve the resource with a meeting request that follows the rules above. If you don't specify any users or groups, this scheduling permission is ignored.</p>	<p>Default = EVERYONE</p> <p>If limited access desired: Select Users and Groups With specific people listed.</p>

Scheduling Permission	Overview / Options	Recommend / Default
These users can submit a request for owner approval if the resource is available	<p>Everyone: Everyone in Mason's address book can request a reservation, but it would have to be approved by the Full Owner or Delegate.</p> <p>Select users and groups: Only the specified users and groups can request a reservation, but it would still have to go through an approval. If you don't specify any users or groups, this scheduling permission is ignored.</p>	<p>Select Users and Groups With NO specific people listed.</p> <p>That will ignore this option.</p>
These users can schedule automatically if the resource is available and can submit a request for owner approval if the resource is unavailable.	<p>Everyone: Everyone in Mason's address book can automatically reserve the resource if it is available, and if it is booked, the request will be forwarded to the Full Owner or delegate for review and action</p> <p>Select users and groups: Only the specified users and groups can automatically reserve the resource if it is available or request it if it is already booked. For the latter case, it would require action by the Full Owner or a delegate. If you don't specify any users or groups, this scheduling permission is ignored.</p>	<p>Select Users and Groups With NO specific people listed.</p> <p>That will ignore this option.</p>

4.2 General Preferences (OPTIONAL)

In addition to the scheduling behavior of the resource, there are general preferences that may be set just as with any other account.

1. Log into the Resource Account using the steps outlined in [Section 3.1](#)
2. Click on the **Settings Icon (⚙)** in the top right corner next to the resource name
3. Choose “Options” from the drop down list.
4. Click on **Settings** from the left menu options
5. Select “Mail” from the top menu



6. Update the Mail preferences as desired – some common preferences are below (not all available preference choices are listed here):

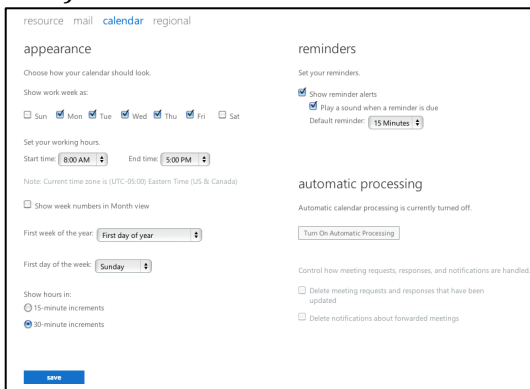
Section	Preference	Common Value
E-mail Signature	Signature Block	Create a signature block for the account. Note, the signature created here is only available for OWA
Message Format	Always Show BCC	Unchecked
Message Format	Always Show From	Checked
Message Format	Compose Messages in this Format	HTML
Message Options	Empty the Deleted Items Folder when I log out	Unchecked
Read Receipts	Choose how to respond to requests	Ask me before sending
Reading Pane	When writing email messages	Type in the Reading Pane <i>(eliminates need for pop ups)</i>
Conversations	Sort messages in the conversation reading pane in this order	Newest Messages on Top

Section	Preference	Common Value
Appearance	Show hours in:	30-minute increments
Reminders	Set your reminders	Both checked: <ul style="list-style-type: none"> Show reminder alerts Play a sound when a reminder is due – default 15 minutes
Automatic Processing	Delete meeting requests and responses that have been updated	UNCHECKED – keeps invites in the inbox that are manually acted upon

- Click “Save” to save any changes to the selections
- Select “Calendar” from the top menu



- Update the Calendar preferences as desired – some common preferences are below (not all available preference choices are listed here):



Section	Preference	Common Value
Appearance	Show work week as	Select days for the work week for the room (typically M-F), but may be different
Appearance	Set your working hours	General hours for Mason are 8:30 – 5:00, but may differ if desired

5 Resource Delegation

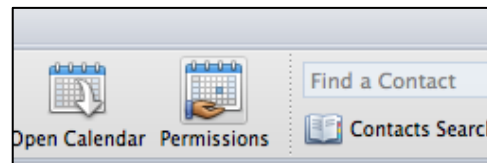
Resource Calendar Delegates may actually put appointments or meetings DIRECTLY on the resource calendar without having to invite it via another account (i.e., the Scheduling Permissions). The benefit of a Resource Delegate over an account owner added by the system administrator is that the delegate is not able to change any settings, access e-mail, or act on behalf of the resource account.

- Delegates can only be added or maintained by someone with “FULL ACCESS” to the Resource Account.
- Delegates for a resource calendar must be added and maintained using Microsoft Outlook 2010 for Windows or Outlook 2011 for Mac. The process to add a delegate is the same as for a personal calendar.

5.1 Add a Resource Delegate

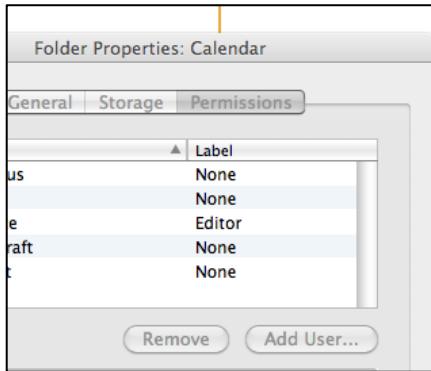
Delegates for resources must be added via the Calendar view within Outlook.

- Open Microsoft Outlook 2011 for Mac
- Navigate to the Calendar View
- Select the Calendar for the Resource in question to bring it into focus
- Click on the Permissions link in the Home ribbon bar:

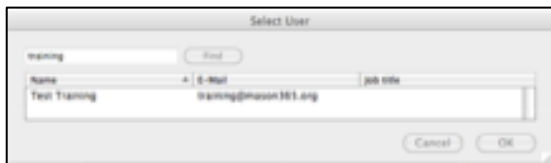


- Wait a moment as the current permissions loads

6. Click “Add User”



7. Type in the net id or name of the person to add and click FIND

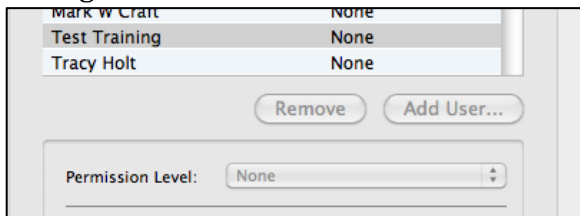


8. Select the record of the person from the list and click OK to add the person to the Delegates List

9. Select the record from the delegates list

10. Update the permissions on the new delegate to the desired access level

- Author – can add and edit items the person creates, but not cannot change anything that someone else created
- Editor – can add new events or edit any that are already on the calendar regardless of who created them



11. Repeat steps for any other delegates to add

12. Click “OK” when done

6 Resource Scheduling

6.1 Basic Scheduling

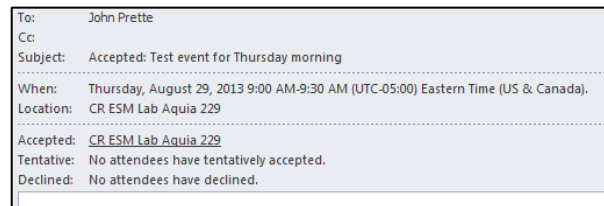
Once set up, resources may be scheduled in the two different ways either as the resource or with the resource:

Scheduling Method	Summary	Who can do it
Schedule WITH Resource	Add the resource in the location field on the meeting request. Resource is considered an attendee for the meeting	<ul style="list-style-type: none"> Full Owner Person listed with Scheduling permission
Schedule the Resource	Create an entry directly on the Resource’s calendar. This is like an appointment on the resource calendar. The resource should not own any meetings scheduled with other people	<ul style="list-style-type: none"> Full Owner Delegate

6.2 Resource Meeting Responses

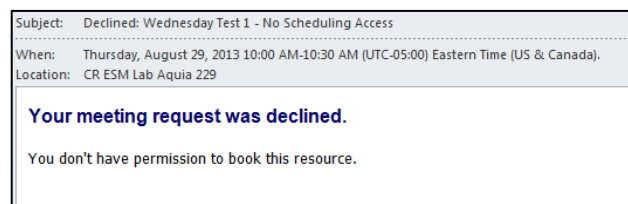
6.2.1 Accepted Responses

If the requester has privileges to schedule the room, the room will generate an automated acceptance to the meeting request and send that to the meeting requester. This is similar to when any other participant accepts a meeting invitation.



6.2.2 Declined Responses

If a person attempts to schedule a resource for which s/he does not have privileges to schedule, that resource will automatically reject the request. An meeting response will be sent back to the requester from the resource’s mailbox:



The mailbox owner may override this and accept the meeting if desired by manually accepting the meeting request on behalf of the room.