

**HARVARD  
CATALYST**

THE HARVARD CLINICAL  
AND TRANSLATIONAL  
SCIENCE CENTER

## Quick Start Guide: Resource Management

In this guide you will learn how to manage your resources in the HCCRC Scheduling System by creating and editing resources, creating and editing entries for resource default availability, temporary adjustments, standard alternates and sub-location closures, as well as managing annotations and gender restrictions.

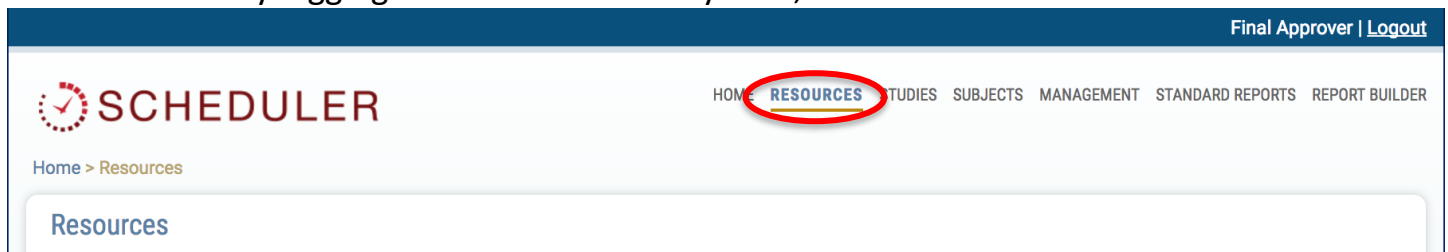
## Navigate to the Resource Module

Before starting, please note that resource management (add, delete or edit resource information) can only be performed by specific user roles in the Scheduler System. These user roles include:

- Super Admin
- Resource Manager
- Scheduler
- Front Desk

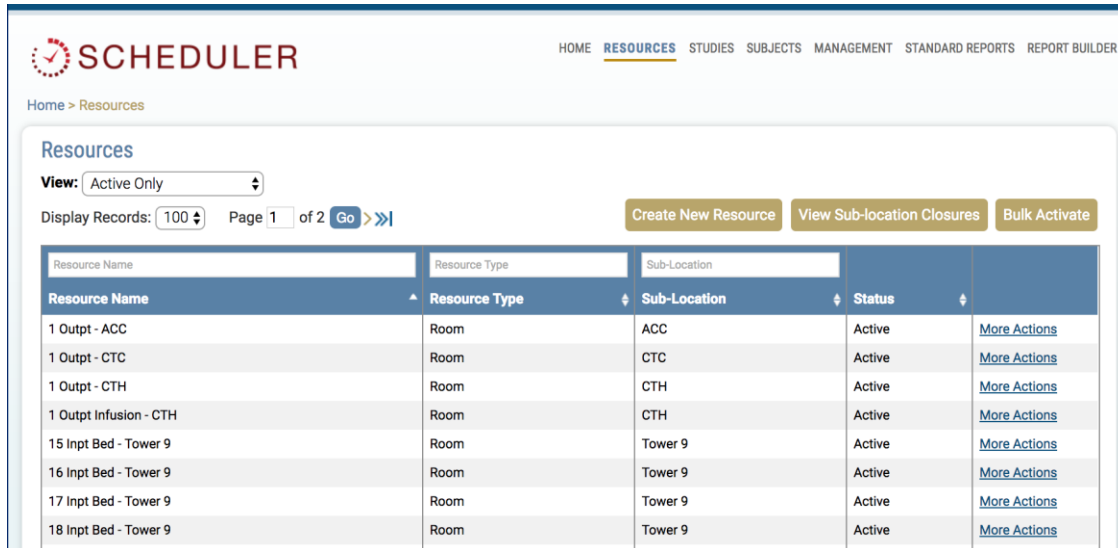
If you are not one of the specified user roles listed above, you will not have the ability to manage resources in the Scheduler System. However, all users have the ability to view resource information.

After successfully logging into the Scheduler System, click on the module labeled *Resources*.



The *Resources Module* displays a page with all resources in your Scheduler System. Resources are organized in a sortable table with 4 different fields: *Resource Name*, *Resource Type*, *Resource Sub-Location* and Status.

The Filter By dropdown list can be used to view active resources only, inactive resources only, or both active and inactive resources.

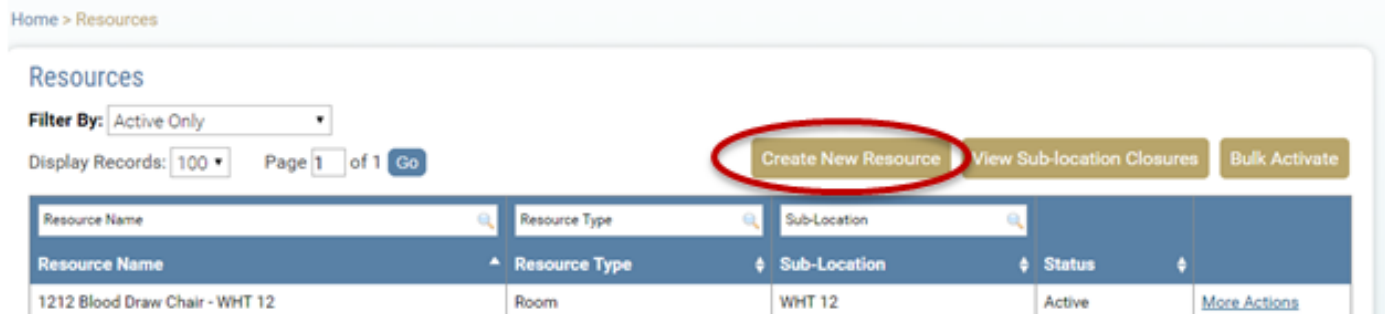


The screenshot shows the SCHEDULER interface with the Resources page. The 'View' dropdown is set to 'Active Only'. There are three buttons: 'Create New Resource', 'View Sub-location Closures', and 'Bulk Activate'. Below is a table of resources:

Resource Name	Resource Type	Sub-Location	Status	
1 Outpt - ACC	Room	ACC	Active	<a href="#">More Actions</a>
1 Outpt - CTC	Room	CTC	Active	<a href="#">More Actions</a>
1 Outpt - CTH	Room	CTH	Active	<a href="#">More Actions</a>
1 Outpt Infusion - CTH	Room	CTH	Active	<a href="#">More Actions</a>
15 Inpt Bed - Tower 9	Room	Tower 9	Active	<a href="#">More Actions</a>
16 Inpt Bed - Tower 9	Room	Tower 9	Active	<a href="#">More Actions</a>
17 Inpt Bed - Tower 9	Room	Tower 9	Active	<a href="#">More Actions</a>
18 Inpt Bed - Tower 9	Room	Tower 9	Active	<a href="#">More Actions</a>

## Adding New Resources

To create a new resource, click the Create New Resource button while on the *Resource* module.



The screenshot shows the SCHEDULER interface with the Resources page. The 'Filter By' dropdown is set to 'Active Only'. The 'Create New Resource' button is circled in red. Below is a table of resources:

Resource Name	Resource Type	Sub-Location	Status	
1212 Blood Draw Chair - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>

This will take you to the *Create New Resource* page where you select the resource type, sub location and enter a resource name. Note that you can reference existing resource names to save typing parts of the new resource name. Sub location will also be automatically appended at the end of the new resource name.

## New Resource

\*= Required Field

Resource Type *	<input type="text" value="Choose or Type Ahead"/>
Sub-Location *	<input type="text" value="Choose or Type Ahead"/>
Existing Resource Name	<input type="text" value="Choose or Type Ahead"/>
Resource Name *	<input type="text"/>

Cancel

Save as Inactive Resource

Save as Active Resource

Once information about the new resource is entered, the new resource can be saved as an inactive resource (not yet ready for scheduling) or an active resource (ready for scheduling).

## More Actions on Resources

To activate resources, view resource details regarding availability, make, create, delete or edit resource availability information, as well as manage annotations and restrictions, click on the *More Actions* link for the resource of interest...

Resource Name	Resource Type	Sub-Location	Status	
1212 Blood Draw Chair - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1212 Infusion Room Chair A - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1212 Infusion Room Chair B - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1212 Infusion Room Chair C - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1218 Bed A - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1218 Bed B - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>

The More Actions page allows a user to edit the resource name or sub location, or activate an inactive resource by clicking the check box.

Home > Resources > Edit Resource

### Room 1 - CNY

#### Edit Resource

\* = Required Field

Resource Type \* Room

Sub-Location \* CNY

Resource Name \* Room 1 - CNY

Note: Resource name change will apply to all previous and future usages of the resource

Activate this resource (Once activated, the resource cannot be de-activated and will be available for scheduling)

Cancel Save Changes Above

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Collapse All

#### Default Availability

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Day Of Week	Start Time	End Time	Quantity		
Sun	00:00	23:59	1	Edit	Delete
Mon	00:00	23:59	1	Edit	Delete
choose	00:00	00:00	1	Add New	Cancel

This page also has a few expandable sections:

*Default Availability* is when a resource is available. Default availabilities can be added, edited or deleted inline. Existing default availabilities are also displayed.

Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)

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*Temporary Adjustments* are periods within the calendar year when the resource availability differs from the *Default Availability*. The most common use cases are when staff resources may have a vacation or room resources are temporarily out of order. A *Temporary Adjustment* will override the *Default Availability*. Click to expand the *Temporary Adjustments* section to view or manage the period(s) of time when a resource’s availability is temporarily adjusted.

Note that there is a question for “Does this temporary adjustment span overnight”. By default, it is set to No. This means that if 7am to 3 pm is entered for a 3-day time period, 3 separate temporary adjustments are created. If this question is set to Yes, then the same entry would result in one continuous temporary adjustment from 7am on day one to 3pm on day three.

**Temporary Adjustments**

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Start Day of Week	Start Date	End Day of Week	End Date	Quantity		
Thursday	03/02/2017, 00:00	Thursday	03/02/2017, 14:00	1	<a href="#">Edit</a>	<a href="#">Delete</a>

Add Temporary Adjustments

Start Date: 03/02/2017 End Date: 03/02/2017 Quantity:

Start Time: 00:00 End Time: 00:00

Does this temporary adjustment span overnight?  Yes  No

Specific Days:  All Weekdays  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

[Restore](#) [Save](#)

*Alternate Resources* is a subset list of resources that can be substituted if the selected resource is not available upon scheduling. Click to expand the *Alternate Resources* to view or manage this subset list.

**Alternate Resources**

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Resource Name	Resource Type	Sub-location		
1212 Infusion Room Chair A - WHT 12	Room	WHT 12	<a href="#">Delete</a>	
<input type="text" value="choose"/>			<a href="#">Add New</a>	<a href="#">Cancel</a>

*Resource Restrictions*, specifically gender restrictions can be entered for Room type resources. Once a resource is defined to have a gender restriction with another resource, the system will alert/restrict scheduling different gender patients into these resources. Resource restrictions can be managed by expanding the Resource Restrictions section.

● Resource Restrictions

Restriction	Associated Resource	Note		
Gender Restriction	Choose or Type Ahead	notes 255 characters remaining	<a href="#">Add New</a>	<a href="#">Cancel</a>

*Annotations* can be designated for each resource by expanding the Annotations section. Note that previously selected annotations are highlighted in green. Newly selected annotations are highlighted in gray. Once an annotation is chosen, it will be highlighted across the various annotation sections. Click Save to save annotations for a resource.

● Annotations

🏠 Collapse All [Clear All Field Selections](#) [Save](#)

● Nursing Annotations

Deselect All Nursing Annotations

Admitting/Discharging Inpatient	Interprets patient data	Other Specimen Collection Simple
Anthropometry	IV access complex adult	Patient / family teaching Complex
Assess for AE & SAE	IV access complex pedi	Patient / family teaching Simple
Assessment Nursing Intake - Adult	IV access simple - Adult	Point of care testing - complex
Assessment Nursing Intake - Pediatrics	IV access simple - Pediatrics	Point of care testing - simple
Blood Collection Complex	Medication Administration Complex - Adult	Protocol Equipment Operation
Blood Collection Complex - Adult	Medication Administration Complex - Pediatrics	Questionnaire(s)
Blood Collection Complex - Pedi	Medication Administration High Risk IV Push - Adult	Special Protocol Procedure - Complex
Blood Collection Simple	Medication Administration High Risk IV Push - Pediatrics	Special Protocol Procedure - Simple
Blood Collection Simple - Adult	Medication Administration Simple - Adult	Special Protocol Procedure/Equipment Complex
Blood Collection Simple - Pedi	Medication Administration Simple - Pediatrics	Special Protocol Procedure/Equipment Simple
Clamp Adult	Monitor and flush drawline	Specimen Processing
Clinical Nursing Care	Monitoring 1:1	Standard Research Nursing Care
Confirmation of Consent	Non-Nutrition Staff: Meal/snack prep and/or delivery	Travel
EKG 12 Lead	Orders labs and diagnostic tests	Verify Informed Consent
History & Physical - Complete	Other	Vitals - Complex
History & Physical - Targeted	Other Specimen Collection Complex	Vitals - Simple

+ Nutrition Annotations

+ Equipment Annotations

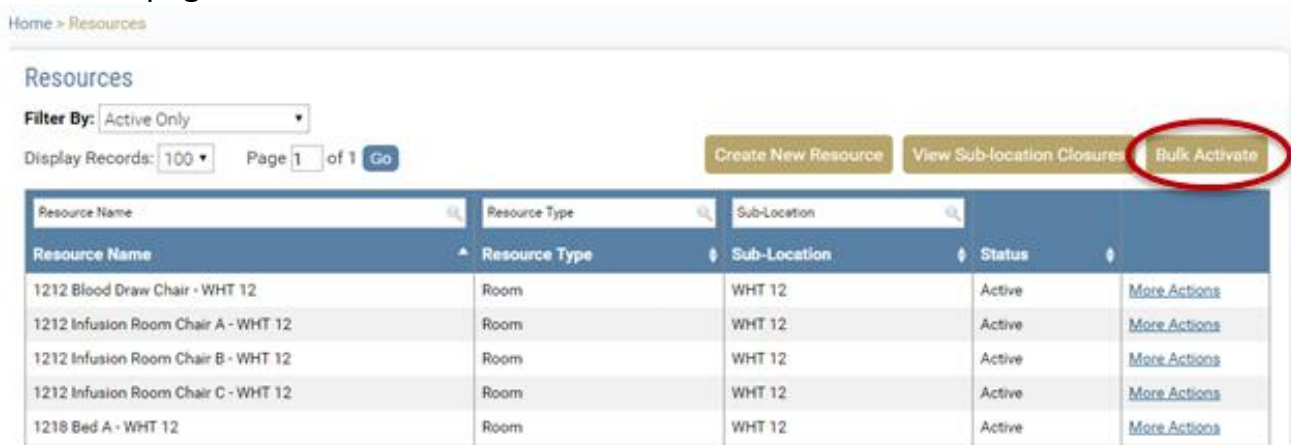
+ Room Annotations

+ Lab Annotations

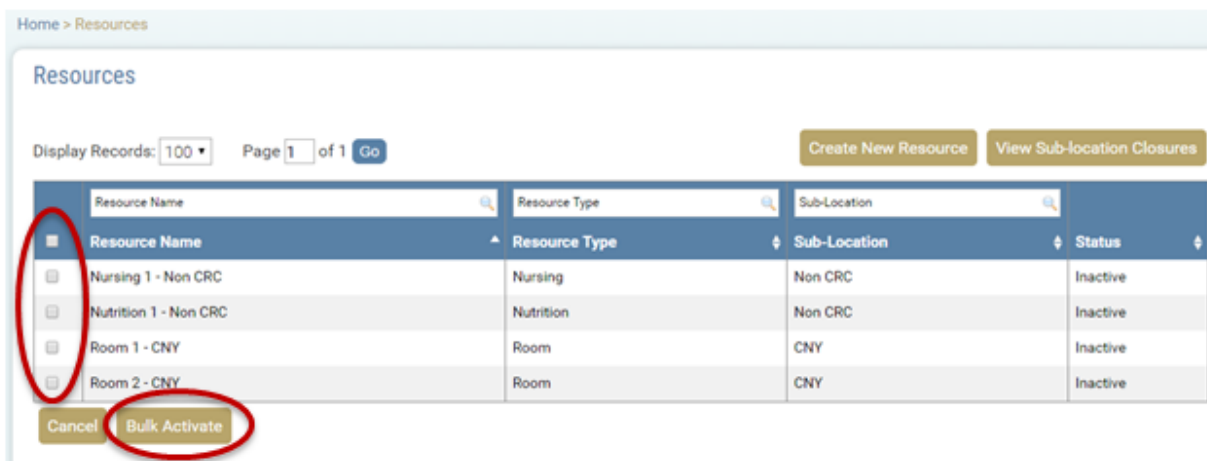
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## Bulk Activate Resources

To activate more than one resource at a time, a user can use the Bulk Activate button from the Resource page.



The resource table will display only inactive resources with check boxes. Use the check box to select resources to activate. Click Bulk Activate to activate these resources.



## Create and Edit Sub-Location Closures

Sub-Location closures are temporary adjustments for sub-locations. This is useful when you need to close all of the resources in a particular sub-location due to a holiday or work stop. Instead of creating a temporary adjustment for each of the resources in the sub-location, you can create a single entry to mark **ALL** resources unavailable for scheduling for a specified time period.

To view sub-location closures, click on the *Sub-Location Closures* button found on the *Resource Module Page*. You will be navigated to a list containing all of your *Sub-Location Closure* entries.

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Home > Resources

### Resources

Filter By: Inactive Only

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[Create New Resource](#)
[View Sub-location Closures](#)
[Bulk Activate](#)

Resource Name	Resource Type	Sub-Location	Status	
1212 Blood Draw Chair - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1212 Infusion Room Chair A - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>
1212 Infusion Room Chair B - WHT 12	Room	WHT 12	Active	<a href="#">More Actions</a>

To add *Sub-Location Closures*, click on the *Add Sub-Location Closure* button...

### Sub-Location Closures

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[Add Sub-Location Closure](#)




Sub-location	Start Date	End Date	Reason	
CNY	11/26/2014 15:00	12/01/2014 07:00	Closed: Thanksgiving	<a href="#">Delete</a>
CNY	03/03/2014 11:30	03/03/2014 19:00	Closed: CRC Staff Retreat	<a href="#">Delete</a>
CNY	01/06/2014 13:30	01/06/2014 19:00	Closed: CRC Staff Retreat	<a href="#">Delete</a>
CNY	12/24/2013 15:00	12/24/2013 23:59	CLOSED: Christmas	<a href="#">Delete</a>
CNY	12/25/2013 00:00	12/25/2013 23:59	CLOSED: Christmas	<a href="#">Delete</a>

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Select or enter your closure *Start Date*, *End Date*, *Sub-Location*, and *Reason*...  
Click the *Save* button and confirm your *Sub-Location Closure* entry.

## New Sub-Location Closure

\* = Required Field

Start Date *	<input type="text" value="03/02/2017 00:00"/>	
End Date *	<input type="text" value="03/02/2017 00:15"/>	
Sub-Location *	<input type="text" value="Choose or Type Ahead"/>	
Reason	<input type="text"/>	

To delete a *Sub-Location Closure*, click on the *Delete* link along the row of the *Sub-Location Closure* entry.

Home > Resources > Sub-Location Closure List

### Sub-Location Closures

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Sub-location	Start Date	End Date	Reason	
CNY	11/26/2014 15:00	12/01/2014 07:00	Closed: Thanksgiving	<a href="#">Delete</a>
CNY	03/03/2014 11:30	03/03/2014 19:00	Closed: CRC Staff Retreat	<a href="#">Delete</a>
CNY	01/06/2014 13:30	01/06/2014 19:00	Closed: CRC Staff Retreat	<a href="#">Delete</a>
CNY	12/24/2013 15:00	12/24/2013 23:59	CLOSED: Christmas	<a href="#">Delete</a>
CNY	12/25/2013 00:00	12/25/2013 23:59	CLOSED: Christmas	<a href="#">Delete</a>

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