

**Outlook Add-in installation link:** <https://utsa.resourcescheduler.net/OutlookAddin/manifest.xml>

This link will need to be entered when installing the Outlook Add-in from your Outlook application

## Resource Scheduler for Outlook 365 (RSO365)

RSO365 is an add-in that connects Microsoft Outlook with Resource Scheduler, so users can see if specific resources are available when scheduling appointments and meetings. Once installed, the FM:Systems icon appears in Outlook when creating an appointment or meeting on a calendar. The RSO365 add-in supports bidirectional integration with MS Exchange through Microsoft 365 and is available from any native workflow used to create a meeting or appointment in the Outlook desktop or web application.

**Note:** RSO365 is not available in the Outlook mobile app. However, all meeting information— whether created with the add-in or not—is available on all devices.

Users can **Find** amenities by selecting an attribute to filter, including capacity. If you know the specific attribute you want, like a person's name or conference room, search for it in the space provided.

## Using RSO365

RSO365 allows users to filter for meeting spaces and resources they need within the familiar scheduling tool of Microsoft Outlook. Because the filtering process is data-driven, unique attributes configured in a user's Exchange are available. Creating a meeting within RSO365 is the same process whether in the Outlook Desktop or Web App - [the only difference is opening the add-in](#). Additionally, [existing meetings](#) can also be updated with RSO365 using the same steps as [creating a new meeting](#). Once a room is reserved, the Outlook details are updated and the corresponding Resource Scheduler information is entered into the event details.

## Opening RSO365 in Outlook Desktop App

1. Using your preferred workflow, open an Appointment or Meeting event.
2. Click the add-in displaying in the main ribbon.



**Result:** A side menu displays.

**Note:** These attributes are data-defined based on your database, so your filter options may differ from this example.

Find a Room

Default Region

Location/Group

Resource Types

Resource Characteristics

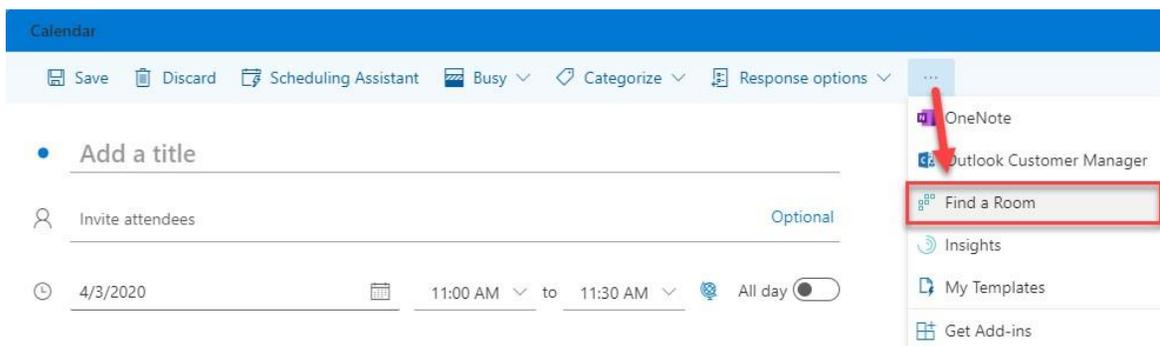
Capacity Any

Search

## Opening RSO365 in Outlook Web App

1. Using your preferred workflow, open an Appointment or Meeting event.
2. In the Calendar window menu, click the ellipsis (...), then select **Find a Room**.

**Note:** if you don't see a menu with an ellipsis, click "More options" to expand the Calendar window.



**Result:** A side menu displays.

**Tip:** to add the "Find a Room" add-in to the main list of icons at the top of the Calendar window, complete the following steps:

- a. From the top toolbar, click the **Settings** icon > **View all Outlook Settings**.
- b. Next, select the **Calendar** tab > **Customize actions**.
- c. Select the "Find a Room" check box. To change the order in which these icons appear, select them in a different order.
- d. **Save**.

## Create a New Meeting

1. Open a new meeting or appointment event in Outlook, then enter basic meeting details, such as Title, Description, and Attendees.

**Note:** Users can fill out these fields in Outlook before or after opening RSO365.

2. When you're ready to find a meeting space, open RSO365 in the Outlook platform you're using ([Desktop App](#) | [Web App](#)).
3. Log in with your Resource Scheduler **mobile** username and password.
4. From the **Find** section, expand the location you want and select the appropriate group, for example First Floor, from the expandable list.
5. Optionally filter by resource types, expand the list and tick the checkbox to select the types to filter by.
6. Expand the Resource Characteristics list to select room equipment options.
7. Set a Capacity value, if needed.
8. Click **Search** to view spaces that have the resources requested.
9. Click the space name you want, then **Reserve** to add it to the event window in Outlook. A link to the Resource Scheduler is also added to the body of the event information.

## Update an Existing Meeting

Select an existing meeting in either the Outlook desktop or web application. Click the RSO365 add-in and, using the same steps as when [creating a new meeting](#), update the meeting.