Dotmatics

LabArchives

Quick Start Guide for Administrators

LabArchives Scheduler

LabArchives Scheduler is a calendar and scheduling service for the management and scheduling of resources – from desks to lab space or from microscopes to flow cytometers; if you have a resource that you need to manage access to, Scheduler provides an easy and customizable solution for your team. Application Administrators will customize Scheduler to include the resources your organization wants to manage including the permissions for when and who can book a resource.

support@labarchives.com

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Getting Started

The first person to create an account at scheduler.labarchives.com has full administrative rights and takes on the role of **Application Administrator** for the Scheduler Organization.

The Application Administrator can create Resources, invite others, and manage Reservations. All the key functionality needed to set up LabArchives Scheduler can be found by clicking **Application Management** from the purple navigation bar at the top of the page.

To help you quickly navigate through Scheduler and understand how it functions, keep this in mind: **In Scheduler, you create Reservations for Resources that are on a Schedule and Users are invited to an Organization.**

- **Resources:** A piece of equipment, a meeting room, or tool that you can reserve.
- **Reservation:** A designated time that you or other people will be using a resource.
- **Schedules:** Time that you can select from to book a reservation.
- **Organization:** An individual group in Scheduler that often represents a research team, lab, department, office location, or an entire institution.
- Scheduler **Users** are invited to an **Organization** in order to be able to view the **Schedule** and **Reserve** a **Resource**.
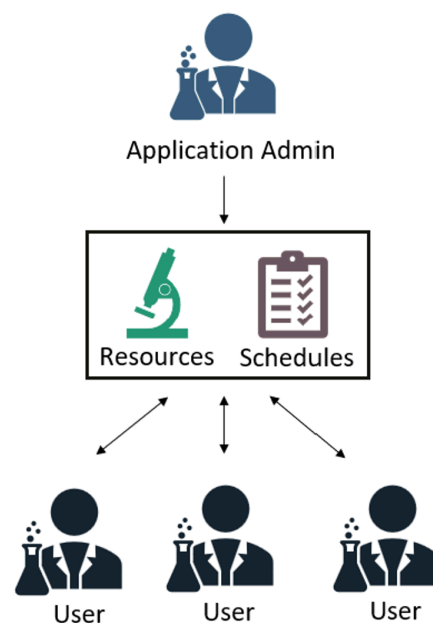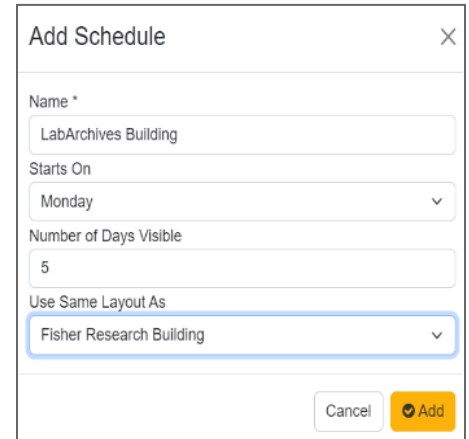
Create Schedules

The default Schedule in your Organization is available 7 days a week from 8am-6pm, which you can edit and rename if you wish to.

If you would like to create an additional Schedule, please follow the steps below.

1. To set up the Schedules, click **Application Management** and select **Schedules**.

2. You can click on the green **Add Schedules** icon on the right-hand side.

3. Here you can set the name of your Schedule, how many days the Schedule operates for and what day of the week you want the Schedule to start from.

4. Once the Schedule is created you can edit any information by clicking on the pencil icon.
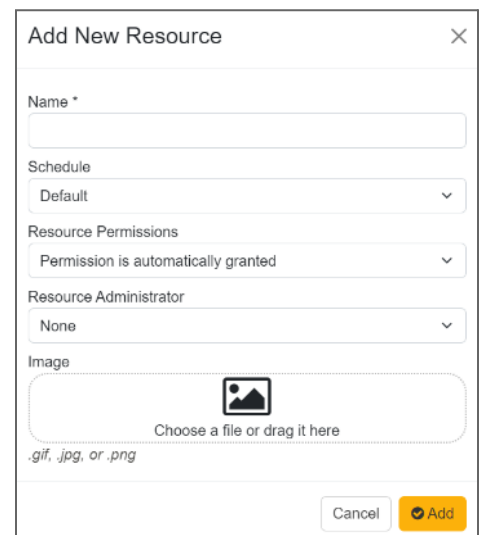
Add Resources

To set up the Resources, click **Application Management** from the purple navigation bar and select **Resources**.

1. Click on the **Add Resource** link on the right side of the page.

2. Unless you have set up a new Schedule for your organization, the Resource by default will be available 7 days a week from 8am-6pm. Other members of your team will be able to reserve the equipment without requesting permission. If you wish to change any of these settings click on the dropdowns.

3. Click **Add** to save the Resource. Repeat these steps for each Resource.

4. If you would like to add multiple Resources, you can click on the small triple dot icon and select **Import Resources** and follow the steps on screen.

5. From the list of Resources, you can add additional information or adjust the settings for each Resource including the duration, permissions, and access.

Invite Users

To share your Resources with other people you will need to invite them to your Organization.

1. To invite others to Scheduler, click **Application Management** and select **Users**.

2. Click the triple dot menu on the top right and select **Invite User**. You can invite one or multiple people.

3. Each User that you invite will receive an email prompting them to login and they will create an account if they don't have

one. By default, a User will be able to reserve any Resources that have been set up by the Application Administrator. However, they will not be able to create new Resources or invite others to reserve equipment.

4. From the list of Users, you can view those that are Active or Inactive in the Organization.

5. From the **Actions** column, you can remove Users from having access to certain Resources, change the permissions that they have, or view the Reservations that they have created.
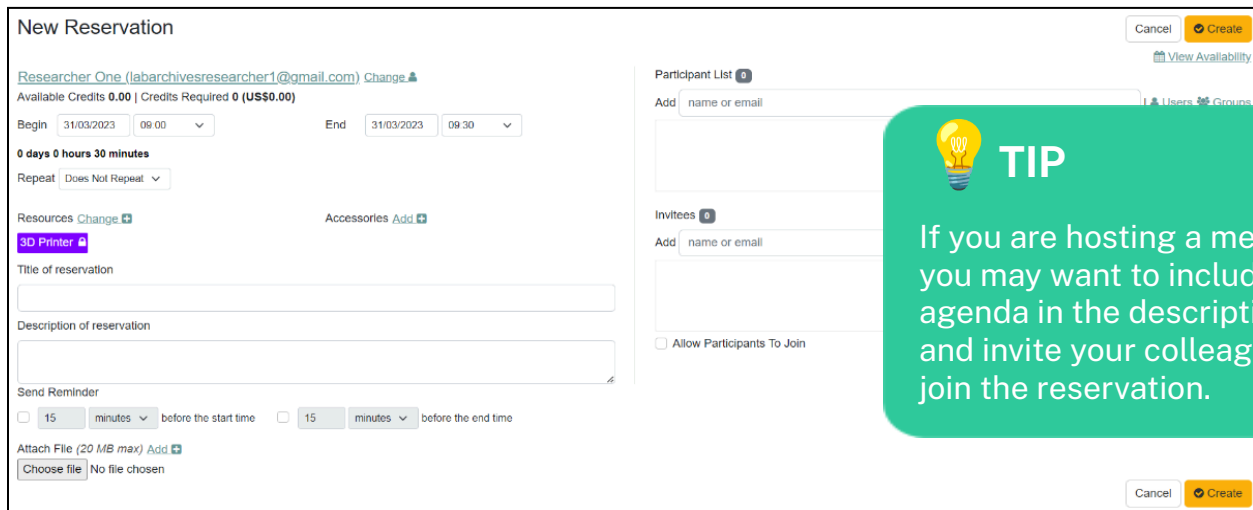
Create Reservations

To create a new Reservation, you must find a Resource that is available for a specific time.

1. To view a calendar showing all Resources, click **Schedule** and select **Bookings**.

2. To search for a time when a Resource might be available, click **Schedule** and select **Find a time**.

3. To create a Reservation, select the time and Resource that you would like to use.

4. On the **New Reservations screen**, add more information about your Reservation and click **Create**.

# Manage Resources and Reservations

Blackout Times

- If a Resource is going to be unavailable (for maintenance, cleaning, calibration, etc.) you can set up a Blackout Time.
- To create a Blackout Time, click **Application Management** and select **Blackout Times**.

Announcements
- An Announcement will be available on the **Dashboards** page and is a great way to notify your team about important information.
- To create an Announcement, click **Application Management** and select **Announcements**.

Reports

- You can review all Reservations made by your Users and run reports on usage.
- To create a Report, click **Reports** and select **Create New Report**.
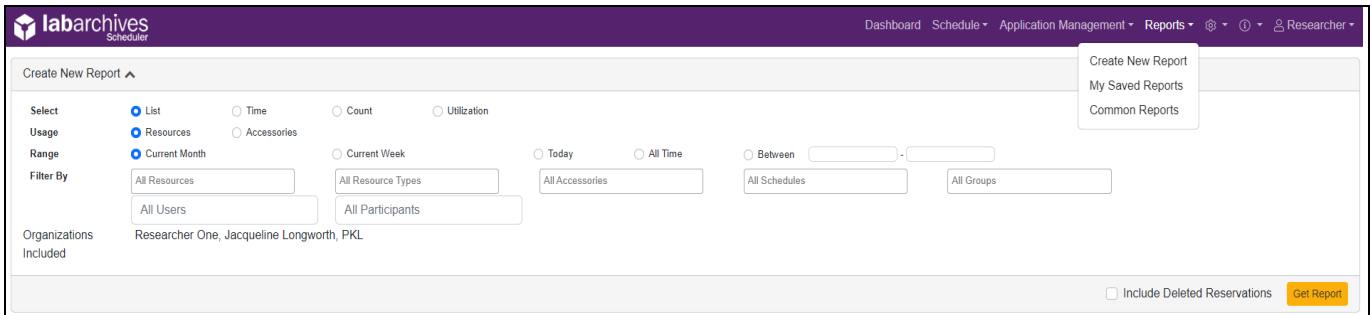
Application Configuration

Application Administrators will find several settings available to them through the gear icon from the purple navigation bar. Click on this icon to reveal a dropdown menu, which includes **Application Configuration**.

The Application Configuration settings allow Application Administrators to adjust additional settings for their Organization such as time zone, language, privacy settings, reminder emails, and credits.
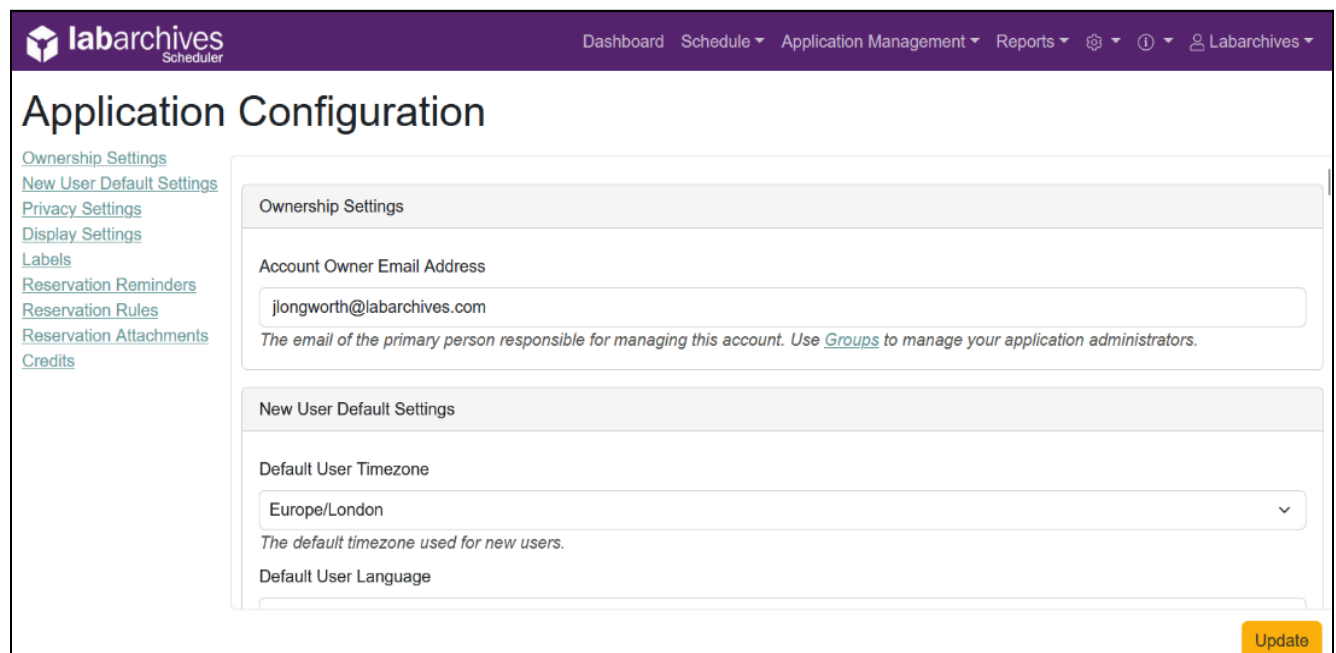
Additional Help and Support

Find help through the **Information** icon and visit the [Knowledgebase](#) to browse by support topic, view [Video tutorials](#) or submit a question directly to our [Support team](#). Register for one of our [regional webinars](#) to attend a live training session hosted by a LabArchives trainer.