



Quick Start Guide for Scheduler Administrators

LabArchives Scheduler

See at a glance what is being used, when and by whom and keep your lab running at peak efficiency with LabArchives Scheduler. Application Administrators can create custom scheduling rules and quotas, monitor resources with custom fields, set user access permissions, and more. We recognize that we have a significant responsibility to protect and secure your data, which is why our application undergoes annual external audits.

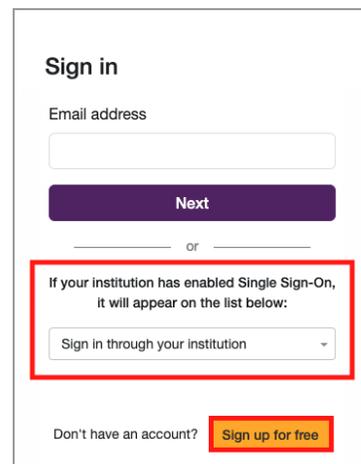
support@labarchives.com

Version 02.21.25

Create your LabArchives™ Scheduler

Organization

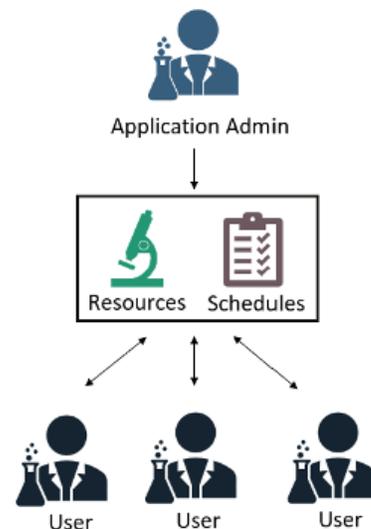
We recommend the Lab Manager or another team admin create the Scheduler Organization from their LabArchives account. The creator of the Organization is given the Application Administrator role, which allows them to create Resources, invite Users, and manage Reservations from the Application Management tab.



- Create an account at scheduler.labarchives.com.
- Enter your email address or select your institution from the **Sign in through your institution** list.
- If you would like to create a free account, click **Sign up for Free**.

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.**

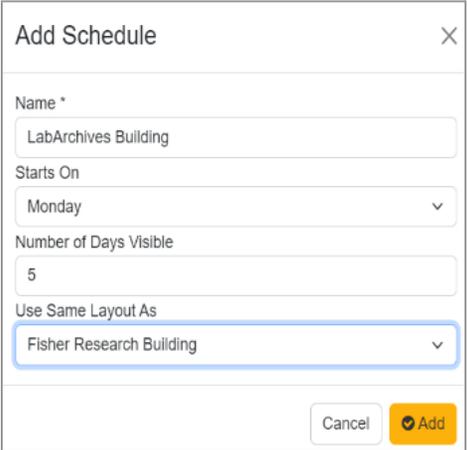
- **Resources:** A piece of equipment, a meeting room, or tool that you can reserve.
- **Reservation:** A designated time that you or other people will be using a resource.
- **Schedules:** Time that you can select from to book a reservation.
- **Organization:** An individual group in Scheduler that 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 for an Organization is available 7 days a week from 8am-6pm and can be edited to reflect your operating hours. Additional Schedules can also be created.

1. To set up a Schedule, click **Application Management** and select **Schedules**.
2. Click on the green **Add Schedules** icon on the right-hand side.
3. Add the name of the Schedule, how many days the Schedule operates for and what day of the week you want the Schedule to start on.
4. Once the Schedule is created you can edit any information by clicking on the **Pencil** icon.



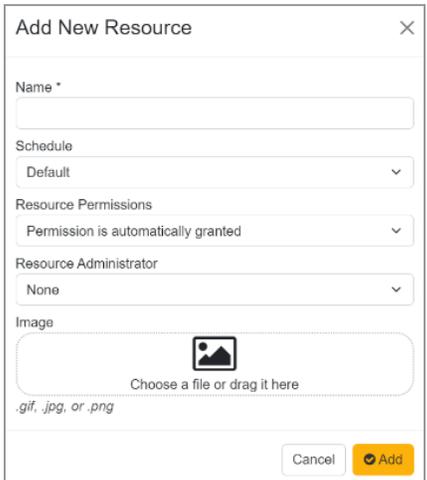
The 'Add Schedule' form contains the following fields and options:

- Name ***: Text input field containing 'LabArchives Building'.
- Starts On**: Dropdown menu with 'Monday' selected.
- Number of Days Visible**: Text input field containing '5'.
- Use Same Layout As**: Dropdown menu with 'Fisher Research Building' selected.
- Buttons**: 'Cancel' and 'Add' (with a plus icon).

Add Resources

Add Resources to the Organization and adjust the permissions for allowing access to book the Resource.

1. Click **Application Management** from the purple navigation bar and select **Resources**.
2. Click on the **Add Resource** link on the right side of the page.
3. Unless you have set up a new Schedule for your organization, the Resource by default will be available 7 days a week from



The 'Add New Resource' form contains the following fields and options:

- Name ***: Text input field.
- Schedule**: Dropdown menu with 'Default' selected.
- Resource Permissions**: Dropdown menu with 'Permission is automatically granted' selected.
- Resource Administrator**: Dropdown menu with 'None' selected.
- Image**: File upload area with a placeholder image icon and the text 'Choose a file or drag it here'. Below the area, it lists supported file types: '.gif, .jpg, or .png'.
- Buttons**: 'Cancel' and 'Add' (with a plus icon).

8am-6pm and members of the Organization will be able to reserve the equipment without requesting permission.

4. Click **Add** to save the Resource. Repeat for each Resource.
5. If you would like to add multiple Resources at a time, click on the small triple dot icon and select **Import Resources** and follow the steps on screen.
6. From the list of Resources, add additional information and adjust the settings to include the duration, permissions, and access.

The screenshot shows a configuration page for a resource named "Gel Doc 6117". On the left, there is a section for "Resource Color" with a purple square and a "Remove" button. The main content area is divided into three columns: "DURATION", "PERMISSIONS", and "ACCESS".

- DURATION:** There is no minimum reservation duration, no maximum reservation duration, no buffer between reservations, and reservations can be made across days.
- CAPACITY:** This resource has unlimited capacity.
- PERMISSIONS:** Users | Groups. PUBLIC: Show to public (RSS, iCalendar).
- ACCESS:** Reservations can be made up until the current time, updated up until the current time, deleted up until the current time, and can end at any point in the future. They do not require approval, permission is not automatically granted, and do not require check in/out or allow concurrent reservations.

Additional details include: Status: Available; Schedule: Hepner Research Bldg (S3); Resource Type: (no resource type set); Sort Order: 0; Location: (no location set); Contact: John doe (919-600-6000); Description: This is the Gel Doc in room 6136; Notes: (no notes); Resource Administrator: None; Print QR Code.

Invite Users

In order to book Resources and view a Schedule, Users need to be invited to the Organization.

1. 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 receives an email invitation with a link to join the Organization. Users can also create an account if they don't have one.

The "Invite Users" dialog box has a title bar with a close button (X). Below the title bar is a text input field with the placeholder "Enter the email addresses of the people to invite". Below the input field, it says "Open Invitations: None". At the bottom right, there are two buttons: "Cancel" and "Invite Users" (which is highlighted in yellow).

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

4. From the list of Users, view those that are **Active** and make users **Inactive**.
5. From the **Actions** column, remove Users from having access to certain Resources, change the permissions that they have, or view the Reservations that they have created.

Name	Username	Email	Created	Last Login	Status	Credits	Actions
Student Four	labarchivesresearcher4@gmail.com	labarchivesresearcher4@gmail.com	8/10/20 06:09	28/10/20 08:39	Active	0.00	[icon] [icon] [icon]
Jacqueline Longworth	jlongworth@labarchives.com	jlongworth@labarchives.com	3/9/20 02:46	28/3/23 08:13	Active	0.00	[icon] [icon] [icon]
Researcher One	labarchivesresearcher1@gmail.com	labarchivesresearcher1@gmail.com	3/9/20 02:44	28/10/20 09:50	Active	0.00	[icon] [icon] [icon]

Rows: 1 - 3 (3)
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- Permissions
- Groups
- Credits
- Reservations

Additional Application Management Tools

Additional customization options available from the Application Management menu include:

Blackout Times – Use at the Resource level so that reservations cannot be made in time of maintenance or for any downtime need

Quotas – Control the use of a Resource to ensure that it is not overused or that use is distributed fairly

Accessories – Disposable or reusable items that don't constitute the standard definition of a Resource such as a camera or projector

Announcements – Send and post messages to members of the Organization with information such as resource downtime, maintenance windows, or holiday hours

Custom Attributes – Add custom fields to reservations, resources, or resource types to further customize your Scheduler Organization

Reports

Generate detailed usage reports to track bookings and resource use, assess the value of resources based on utilization, and recoup costs from equipment maintenance.

1. Click **Reports** and select **Common Reports** for the list of default reports for viewing data by the current day, week, or month.
2. Click **Create New Report** to customize your reports. Once saved, they will be available under **My Saved Reports**.

The screenshot shows the 'Create New Report' interface in the LabArchives Scheduler. The top navigation bar includes 'Dashboard', 'Schedule', 'Application Management', 'Reports', and 'Researcher'. A dropdown menu for 'Reports' is open, showing 'Create New Report', 'My Saved Reports', and 'Common Reports'. The 'Create New Report' form has the following sections:

- Select:** Radio buttons for List (selected), Time, Count, and Utilization.
- Usage:** Radio buttons for Resources (selected) and Accessories.
- Range:** Radio buttons for Current Month (selected), Current Week, Today, and All Time. There is also a 'Between' range selector.
- Filter By:** Input fields for 'All Resources', 'All Resource Types', 'All Accessories', 'All Schedules', and 'All Groups'. Below these are 'All Users' and 'All Participants'.
- Organizations Included:** A text field containing 'Researcher One, Jacqueline Longworth, PKL'.
- Bottom:** A checkbox for 'Include Deleted Reservations' and a yellow 'Get Report' button.

Application Configuration

Through the gear icon and **Application Configuration**, Application Administrators can adjust additional settings for the Organization including the time zone, language, privacy settings, reminder emails and credits.

Create Reservations

After the Application Administrator has customized the Organization and sent invitations, Users can begin making **Reservations**.

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**.

The screenshot shows the 'New Reservation' form. At the top, it displays the user's name 'Researcher One (labarchivesresearcher1@gmail.com)' and their available credits '0.00 | Credits Required 0 (US\$0.00)'. The form includes fields for 'Begin' and 'End' times, currently set to 31/03/2023 09:00 and 09:30 respectively. Below this, there are options for duration ('0 days 0 hours 30 minutes') and a 'Repeat' dropdown set to 'Does Not Repeat'. The 'Resources' section shows '3D Printer' selected. There are also fields for 'Title of reservation' and 'Description of reservation'. A 'Send Reminder' section has two checkboxes, both set to '15 minutes before the start time'. At the bottom, there is an 'Attach File' section with a 'Choose file' button and a note 'No file chosen'. On the right side, there are two 'Participant List' and 'Invitees' sections, each with an 'Add' field and a dropdown for 'Users' or 'Groups'. The form has 'Cancel' and 'Create' buttons at the top right and bottom right.

Additional Help and Support

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

Review the [Quick Start Guide for Scheduler Users](#) for additional information on locating resources and making reservations.