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.
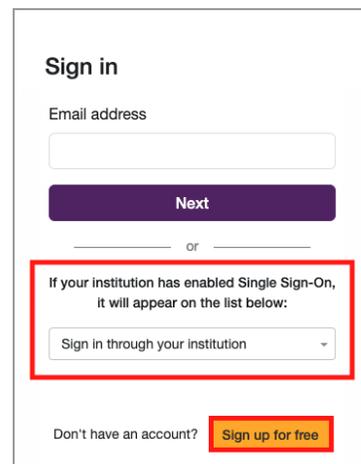
support@labarchives.com

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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.**
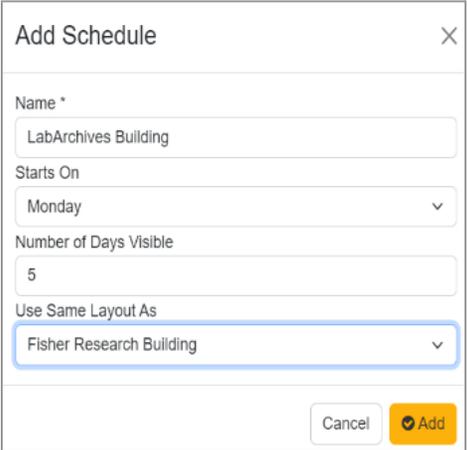
- **Resources:** A piece of equipment, a meeting room, or tool that you can reserve.
- **Reservation:** A designated time that you or other people will be using a resource.
- **Schedules:** Time that you can select from to book a reservation.
- **Organization:** An individual group in Scheduler that 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**.
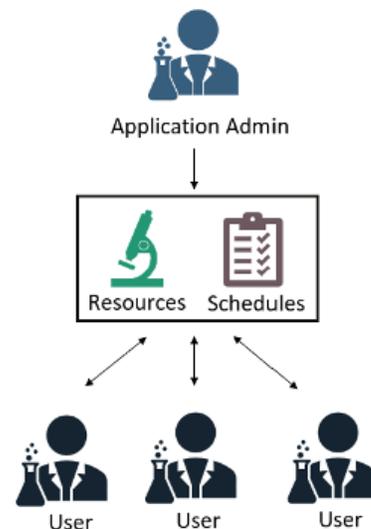
Create Schedules

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.

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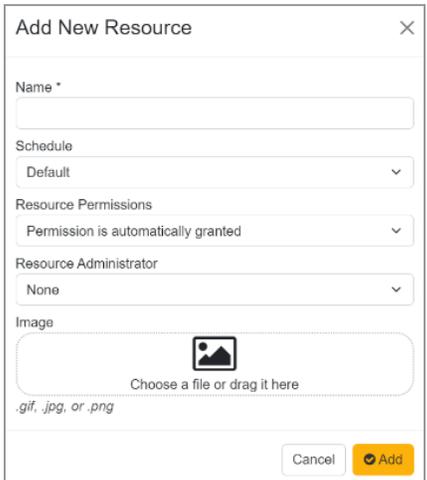
8am-6pm and members of the Organization will be able to reserve the equipment without requesting permission.

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.

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.

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.

Users

Find User | All Users

Status: Active ▾

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 ✎ ⏱	⋮ ▾
Jacqueline Longworth	jlongworth@labarchives.com	jlongworth@labarchives.com	3/9/20 02:46	28/3/23 08:13	Active	0.00 ✎ ⏱	⋮ ▾
Researcher One	labarchivesresearcher1@gmail.com	labarchivesresearcher1@gmail.com	3/9/20 02:44	28/10/20 09:50	Active	0.00 ✎ ⏱	⋮ ▾

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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**.

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**.

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.