Welcome to Lab and Resource Scheduler. Once logged in you will find simple direction on creating and editing the tasks commonly associated with managing meeting rooms, audio/visual equipment and other items.

Contents

MANAGE ORGANIZATIONS

Click on “Manage Organizations” to begin the process of editing all of the resources used in the management of your organization. Once selected, your organizations will appear.

EDIT ORGANIZATIONS:

– If any information needs to change this is the place. Simply clicking on Edit will allow you to edit the Address, City, State or Zip Code.

You will also notice that Name, Address, City, State and Zip are clickable. If you are managing more than one organization this will allow you to perform a sort in the order with which you wish to view.

For Example: If you are managing multiple properties and wish to view them by City, simply clicking on City will immediately sort them in alphabetical order.

MANAGE USERS

Users - Once selected you are brought to an area which allows you to edit the users of any organization you are directly responsible for. This is also the Manage Users button that you see in the banner line underneath your welcome message.

While in this portion of the site you will notice that you are able to choose from the "Organizations:" drop-down field. Organizations: Any Organization or School If you are responsible for more than one organization you will see all of them here. Most are directly responsible for one organization so therefore we will concentrate on this field.

CREATING USERS:

Creating users is extremely simple when following the flow of the input boxes. Begin by having all of the new user's information in front of you. Most importantly, you must know the new user's email address. The password is not much of an issue as you can set a temporary password as they will simply change it on a later date.

To begin, enter the new user's login name. Select a Login name they would typically use for their online presence or one you fell is befitting to them.

Then simply enter their name, email address and give them a temporary password. Alert them that they will need to change this password when they first log in.

There are two checkboxes located underneath the Email field. These boxes will be checked if the user is to be active upon their first login and a checkbox which will make them an administrator of your organization.

EDIT USERS:

Selecting the "Edit" button on a User will bring up a screen of the user that needs to have information altered.

Choose a User and select the "Edit" Button. Once the button is selected, the information will be editable. It is in this area that you can alter the following:

User Login Name
User First Name
User Last Name
User Email Address
User Password

You can also select the "IsActive" checkbox to select whether the User is Active or Inactive. There is also an "IsOrgAdmin" checkbox that enables the User to operate as an Administrator for the Organization.

The "Cancel" button will cancel any action and revert back to the information prior to any alteration. So, if you make a mistake or question the information you need to edit, you can simply click "Cancel".

The "Update" button will save any changes you have made while editing. So, click "Update" when you are done editing user information to save your changes.

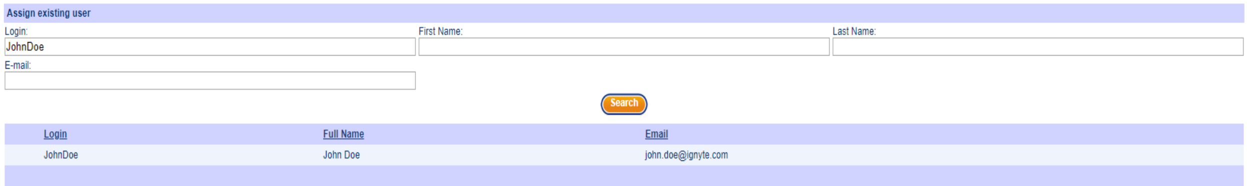
DEASSIGN USERS:

The "Deassign" button will immediately remove the user from your organization, however you will be able to reassign them later should you choose to. This should be used when you wish a user leaves your organization.

ASSIGN EXISTING USERS:

Assigning existing users is done by searching through various terms. You can search for existing users using:

User Login
User First Name
User Last Name
User Email



To find the user you are looking for, fill in the appropriate information and click the “Search” button. 

You will see a list of users. From here you can click the “Assign” button on the user you would like to add.

MANAGE YOUR INFOMATION

You will notice on the toolbar your username. It is located on the far right of the screen. When you roll your mouse over your username you will see that it has turned white and the cursor has turned into a hand. This is where you will be able to change your information.

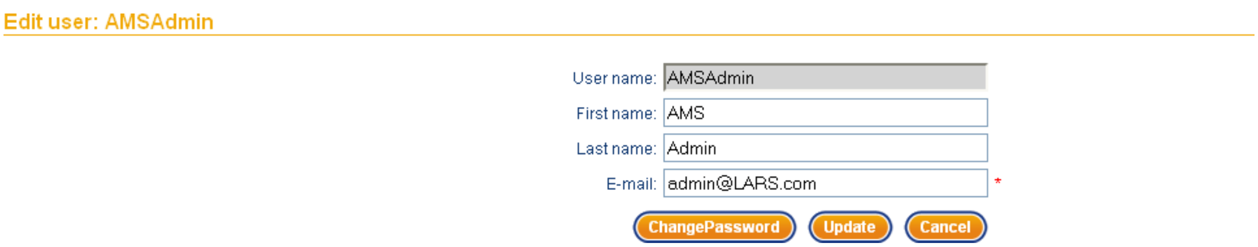
Once you have clicked on your name you will notice that a new screen has popped up allowing you to edit certain items of your online system information.

If at any time you decide you do not wish to change your information, click the "Cancel" button and it will take you to the previous screen.

Once you finish updating your information, click the "Update" button to save all changes.

CHANGE YOUR NAME:

If for any reason you decide you need to change your name within the system



this is the area to do so. You will not be able to edit your username, but you can edit your first and last name which was added by the Organizational Administrator.

To change your First and Last Name, remove and change the information within the "First Name" and "Last Name" box, then press the "Update" button. After a successful update, you will receive a message stating: "Update user details was successful".

CHANGE YOUR EMAIL ADDRESS:

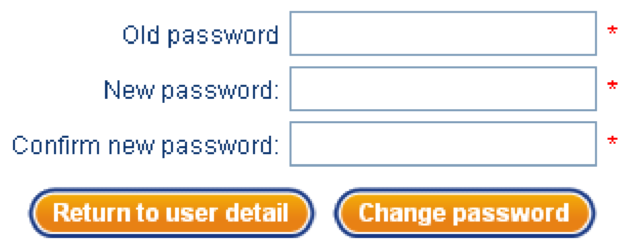
To change your email, remove and change the information within the email address box and press the "Update" button.

CHANGE YOUR PASSWORD:

To change your password, click on the "Change Password" button located to the bottom of the information area. Once clicked, it will open a new form asking that you enter your "Old" password and prompt you for your new password. It will also ask you to repeat the new password to ensure it was the same as the one entered above. For security and safety reasons, your password will be encrypted – providing only a simple black dot instead of the actual typed information.

If you do not wish to change your password at this time, simply click on the "Return to User Detail" button and no changes will have been made.

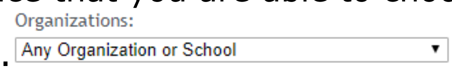
Once your information has been placed within the boxes (all fields are mandatory), click the "Change Password" button. The next time you log in you will need to enter your new password.



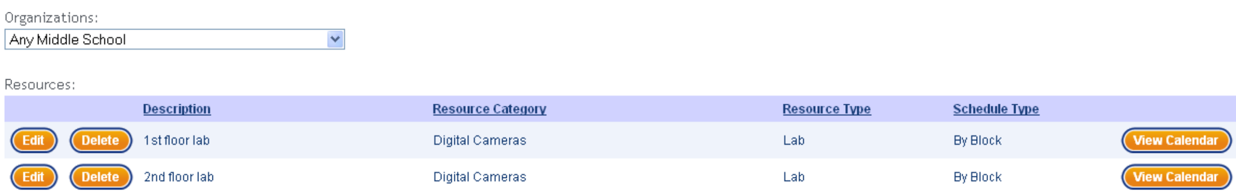
MANAGE RESOURCES

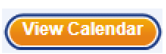
- Once selected you are brought to an area which allows you to edit the users of any organization you are directly responsible for. This is also the 

button that you see in the banner line underneath your welcome message.

While in this portion of the site you will notice that you are able to choose from the "Organizations:" drop-down field. 

If you are responsible for more than one organization you will see all of them here. Most are directly responsible for one organization so therefore we will concentrate on this field.

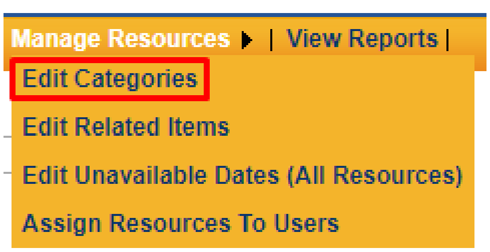




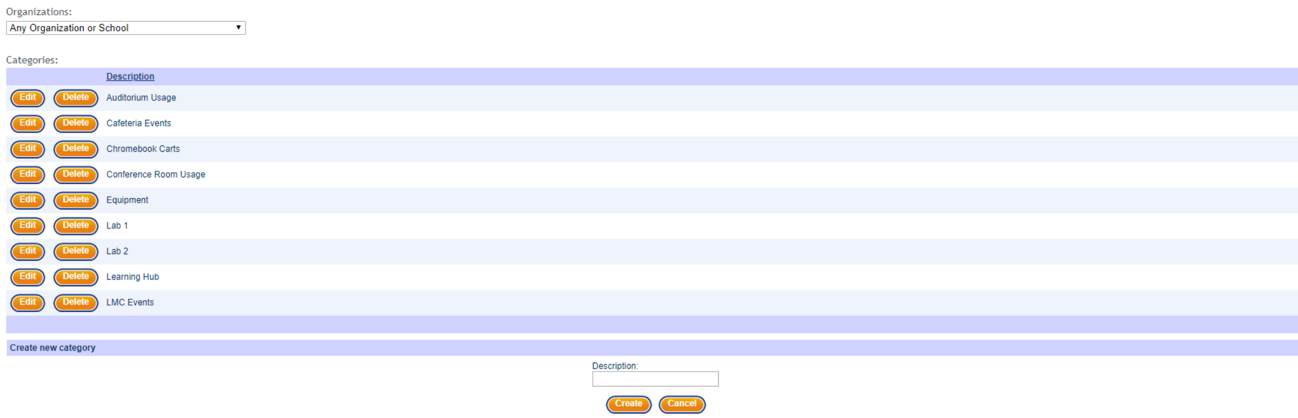
You will notice the similar fields of "Edit" and "Delete" – but there is also a new button labeled "View Calendar", more about this in just a bit.

NOTE: You MUST create a Category before you can create a Resource

MANAGE CATEGORIES:



To Manage Categories, hover your mouse over "Manage Resources" and click on "Edit Categories". Select your organization under the "Organizations:" drop-down.



You should see a list of all Categories currently created for your Organization. Categories are used as a grouping system for your resources. For example, create a Category called "Labs" and store all lab resources under the "Labs" Category for easy organization.

CREATING CATEGORIES:

Create To create a Category, navigate to the bottom of the "Edit Categories" screen. From there enter the Category descriptor you would like to create into the "Description:" textbox and click "Create" to save the Category.

EDITING CATEGORIES:

Edit To edit a Category, click the "Edit" button on the Category you would like to change. Now you can directly edit the Category Descriptor. Once you are done, click the "Update" button Update to save your changes.

DELETING CATEGORIES:

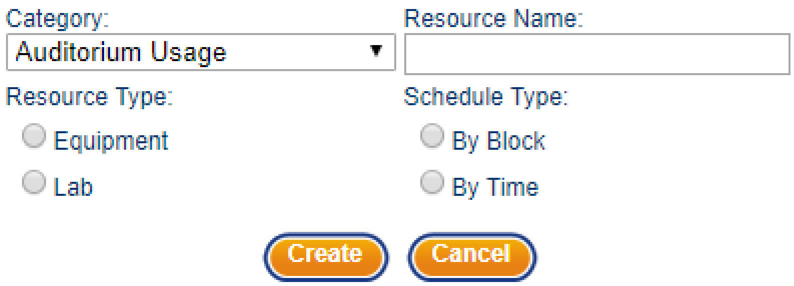
Delete To delete a Category, click the "Delete" button on the Category you would like to change. Confirm "OK" on the popup if you would like to delete.

MANAGE RESOURCES:

Resources are the parts of your organization that you will be scheduling out and keeping track of. Some examples of these are Computer Labs, Laptop Carts, iPad Carts, etc.

To start managing resources, click on the "Manage Resources" menu option.

CREATING RESOURCES:

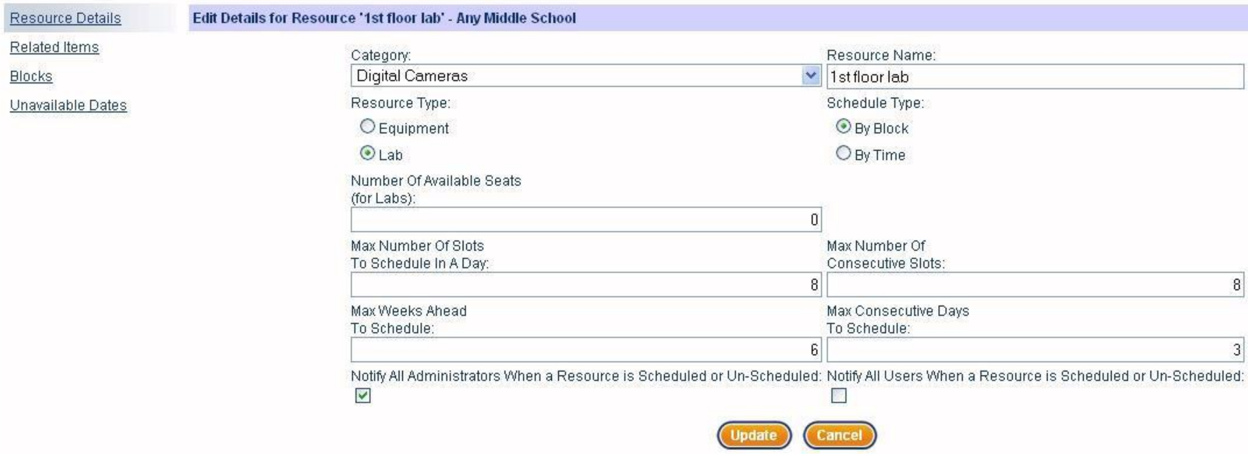


To create a Resource, navigate to the bottom of the "Manage Resources" page. Here you will see the menu shown above. To create a Resource, follow these steps:

1. First, make sure you have created a Resource Category for organization. See above to learn how to do that.
2. Select the Resource category for easy organization under the "Category:" dropdown.
3. Select the Resource type you are creating under the "Resource Type:" selection menu.
    - Labs are given a specified number of seats and can be booked by full room or number of seats.
    - Equipment is booked by full set. For example, Laptop Carts are booked by the whole cart, not 5 laptops.
4. Next, give your Resource a name in the "Resource Name:" textbox.
5. Select whether your new Resource will be scheduled "By Block" or "By Time".
    - Block – Specified length of time, such as a full class period.
    - Time – Scheduled using time for the usage, such as 30 minutes.
6. You MUST click the "Create" button to save your Resource.

NOTE: You MUST select the organization before creating Resources.

EDITING RESOURCES:



Click the "Edit" button to navigate to this screen. Here, you can change everything from the name or the resource, to the dates, to when a User can schedule this Resource.

Here is everything you can do within the "Edit Resource" section:

- **Category:** The Name of the Category to place the Resource. This is a drop-down field which contains all categories. Visit the *Manage Categories* section of this document to learn more about categories.

- **Resource Name**: The name of your resource.

- **Resource Type:** Is the resource a piece of equipment or is it a lab/room? The only difference as far as scheduling is concerned is that labs/rooms can be scheduled by seats.

- **Schedule Type:** Will this resource be scheduled by block or by time? Blocks are pre-specified lengths of time. Visit *Managing Resource Blocks* for more information.

- **Number of Available Seats:** How many seats are available for this resource.
    - **NOTE:** This field is used for Labs/Rooms in which you want Users to schedule by seats instead of the entire room. If you do not want your users to schedule at the seat level, then place a **0** in this field. Otherwise, place the maximum number of seats that

are available. By doing so, more than one user can schedule the same room but the system will track exactly how many seats are available to schedule.

- **Max Number of Slots to Schedule**: How many time slots can be scheduled per day by ONE User? This provides a way to limit those users from monopolizing a resource. Example: Set this to 5 if you want ONE user to be able to schedule up to 5 time slots per day.

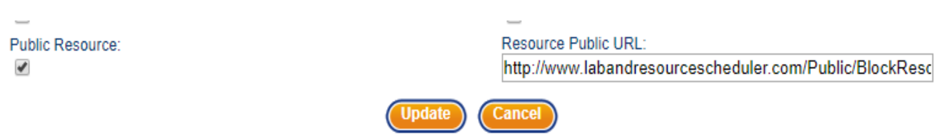
- **Max Number of Consecutive Slots:** How many slots will ONE User be able to schedule consecutively? This provides a way to limit users from monopolizing a resource.

- **Max Weeks Ahead to Schedule**: How many weeks will ONE User be allowed to schedule this resource in advance? This provides a way to limit those users from monopolizing a resource.

- **Max Consecutive Days to Schedule:** How many days will ONE User be allowed to schedule this resource for? This provides a way to limit those users from overbooking a resource. Example: If you don't want a resource scheduled by one person for 3 days in a row, then set this to 2.

- **Notification Checkboxes:** Click these checkboxes if you wish for all Administrators and/or Users to receive an email when this resource is scheduled and/or un-scheduled.

- **Public Resource:**

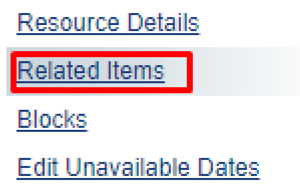


This is a "Read-Only" link to that Resources calendar for public viewing. This means people can only view the information and not change it.

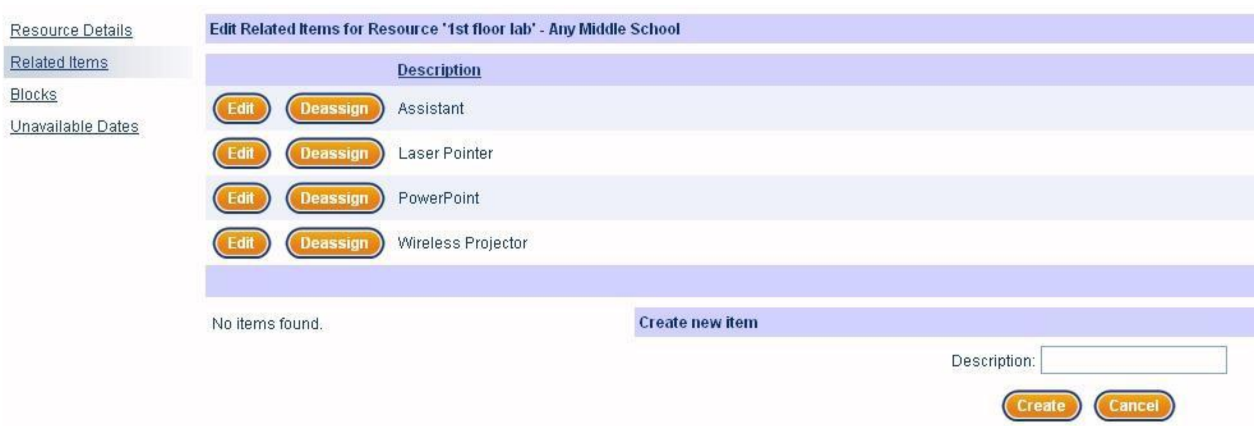
Once you filled in all the information for your resource, click the "Update" button to update this resource or the"Cancel" button to remove any changes.

While we are still on this page you will notice that this resource has 3 other items with which to edit: Related Items, Blocks and Unavailable Dates.

RELATED ITEMS:

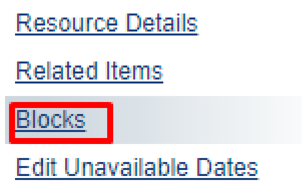


Clicking "Related Items" will list any items associated with that resource. As shown in the image below, the "1st Floor Lab" resource has several Related Items. Clicking on the "Edit" button Edit will simply allow you to change the descriptor of the Related Item. Once you have edited the Related Item, click the "Update" button to save the changes. You can always press the "Cancel" button as well to go back to the corresponding page.



To create a new item, simply enter a description of the new item in the description field and press "Create". If you wish to remove this related item, just de-assign it. This will remove it from association with this resource but leaves it in the system so that you can assign it to other resources. If you truly need to delete the item from the system, you will need to click "Edit Related Items" under the "Manage Resources" main menu item.

BLOCKS:



This is where you will create and manage the blocks for the Resource. This is especially useful, for example, if your organization's janitorial staff must clean the building between a certain set periods of time. For example, you don't allow anyone to schedule an area while it is being cleaned, so therefore you can block out these times.

Pressing "Edit" will simply allow you to change the name of the block. For this instance, "PD8" would be the block we would change.

Pressing the small blue arrow moves the item up or down. This order dictates the exact order as they appear on the calendar when users are scheduling.

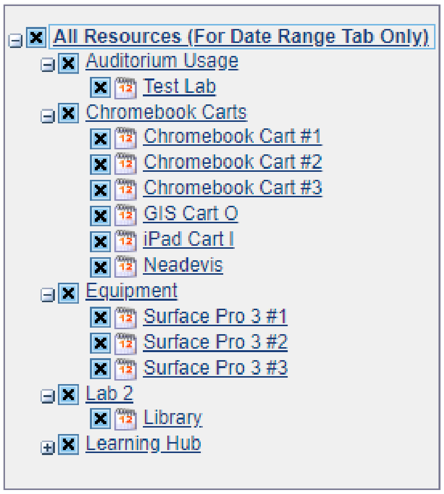
To create a new block for this resource, simply enter the description of the new block in the "Description" field and click on the "Create" button.

Assigning Unavailable Dates to your blocks. Unavailable Dates is covered in depth in the *Unavailable Dates* section of this manual. Please refer to this for more information on managing unavailable dates.

MANAGE UNAVAILABLE DATES:

This is where you will assign and manage the unavailable dates for your resources. You can only assign and manage unavailable dates for resources of the same type, block or time.

SELECTING RESOURCES:



To Select a Resource, drop down the tree menu using the small '+' button to the left of the resource name and category name. Make sure the 'x' is filled in to the box if that is the resource you would like to make unavailable.

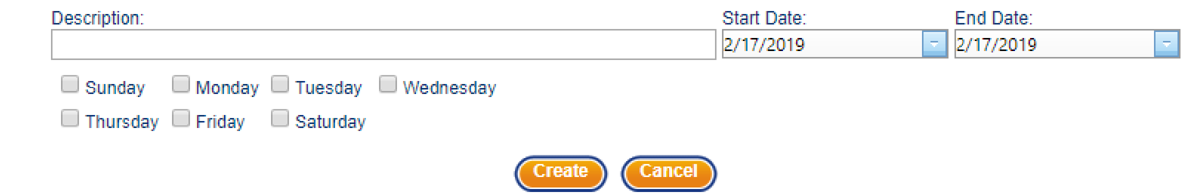
NOTE: Resources must be selected based on Schedule Type for "Slots From Calendar" Scheduling. Also, the blocks must be identical. For example, a resource with blocks "Period 1" and "Period 2" will not be able to be selected with a resource with blocks "Block 1" and "Block 2", even though they have the same Schedule Type.

Date Range Unavailability can be scheduled for all resources regardless of Schedule Type.

BY DATE RANGE:

This is used when you want to make one or more full days unavailable. For example, during holidays you can schedule unavailability for that whole day using this option. Users will not be able to schedule resources if that resource has unavailability at the time they are attempting to schedule.

ADDING DATE RANGE UNAVAILABILITY:



To add a new date range, follow these steps:

1. Select your resources for scheduling. See *Selecting Resources* for more information on how to select resources.
2. Describe the new entry in the "Description:" textbox.
3. Next select the days in which you would like the unavailability to occur. Such as Sundays, since school is not in session, so teachers can't use the Laptop carts.
4. Add the start date and end date for the period you are scheduling these unavailability's. Example, Mondays for the next 4 weeks will unavailable for scheduling Lab 1 Resource due to conferences.
5. Finally, click the "Create" button to save the unavailability.

EDITING DATE RANGE UNAVAILABILITY:

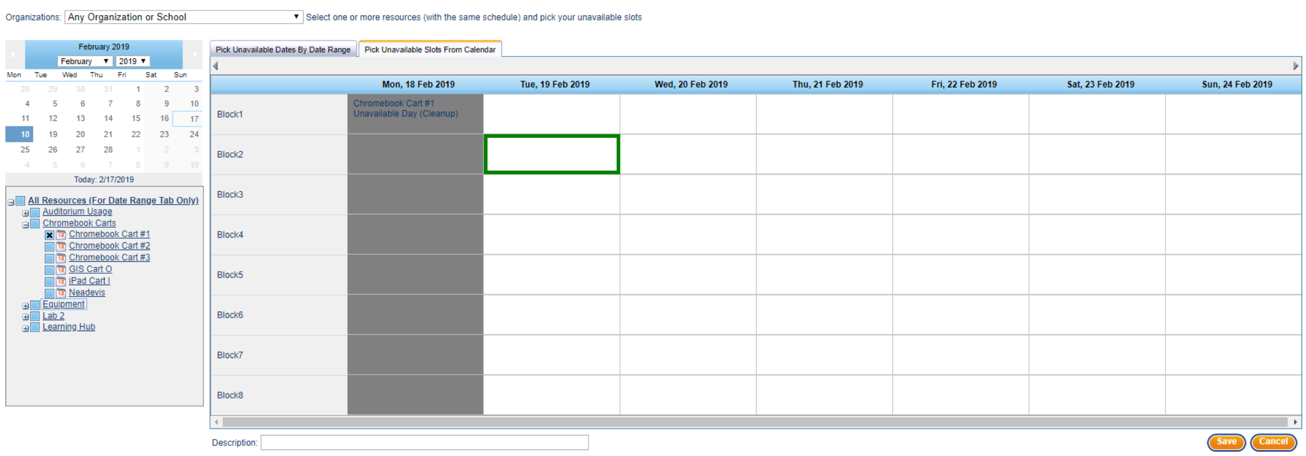
To edit an existing date range, click the "Edit" button. Next change the description, start date, end date, and days that will be unavailable. After you have made all your changes, click the "Update" button 

to save.

DELETING DATE RANGE UNAVAILABILITY:

To delete an existing date range, click the "Delete" button and click "OK" on the confirmation popup to completely delete the unavailability from your schedule.

BY SLOTS FROM CALENDAR (BLOCK SCHEDULE TYPE):

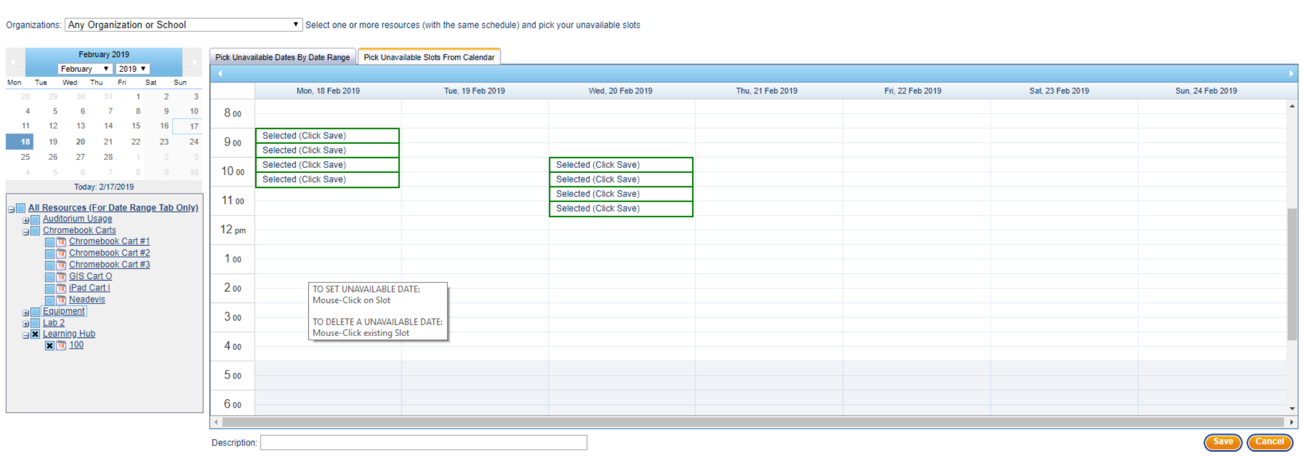


This is where you can add unavailability to resources with the "Block" schedule type. Note, you will not be able to add unavailability to multiple resources unless the resources have identical blocks.

To add unavailability, follow these steps:

1. Select your resources for scheduling. See *Selecting Resources* for more information on how to select resources.
2. Select a date on the calendar on the left-hand side of your screen. This will show you all the days in that week.
3. Click on the slots you want to make unavailable. They will outline in green to let you know what you have selected.
4. Add a description for the unavailability in the "Description" textbox below the schedule.
5. Click the "Save" button to save all unavailability.

BY SLOTS FROM CALENDAR (TIME SCHEDULE TYPE):



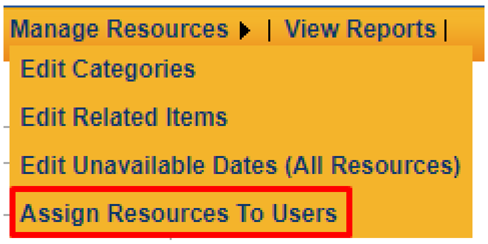
This is where you can add unavailability to resources with the "Time" schedule type.

To add unavailability, follow these steps:

1. Select your resources for scheduling. See *Selecting Resources* for more information on how to select resources.
2. Select a date on the calendar on the left-hand side of your screen.

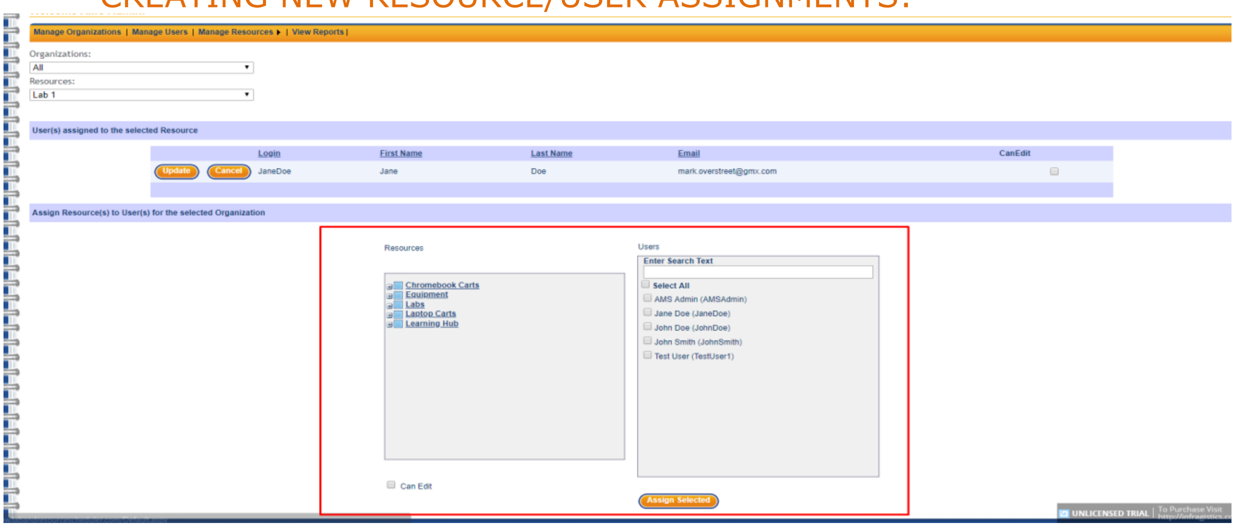
This will show you all the days in that week.
3. Click on the slots you want to make unavailable. They will outline in green to let you know what you have selected.
4. Add a description for the unavailability in the "Description" textbox below the schedule.
5. Click the "Save" button to save all unavailability.

ASSIGNING RESOURCES TO USERS:



This is where you can assign specific users to View and Schedule resources. If you would like some users to see and schedule specific resources, see below.

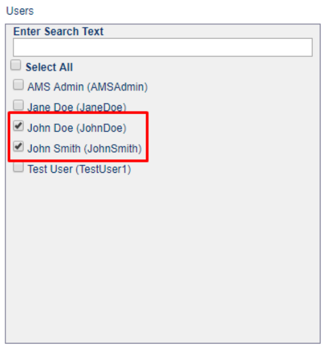
CREATING NEW RESOURCE/USER ASSIGNMENTS:



If you would like to assign specific resources to users, please follow these steps:

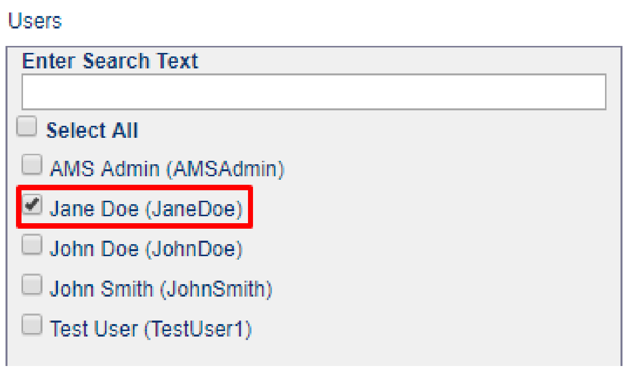
1. Select the resource(s) you would like to assign specific users who can view and schedule. See image below.

2. Next, Select the User(s) who can ONLY VIEW the resource. See image below.



3. Next, click the "Assign Selected" button. 

4. Next, Select the User(s) who can BOTH VIEW AND SCHEDULE the resource. See image below.



5. Next, check mark the "Can Edit" checkbox. 

6. Next, click the "Assign Selected" button. 

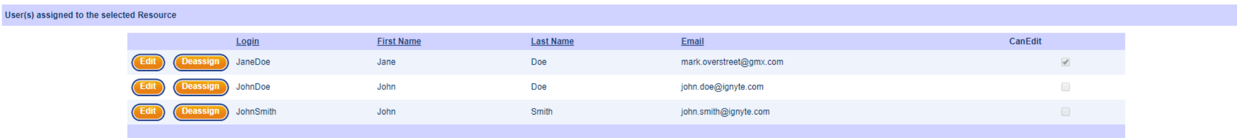
7. Finally, navigate to the top of the screen where you see the "Resources:" dropdown and select the resource you would like to view. See image Below.

NOTE: You can only see the list for one resource at a time in the current build. However, you can assign people to multiple resources.

VIEWING ASSIGNMENTS FOR RESOURCES:

To view assignments for resources, select the resource you wish to view on the "Resources:" dropdown list. 

Once you have selected your resource, you will see all assignments that currently exist for that resource.



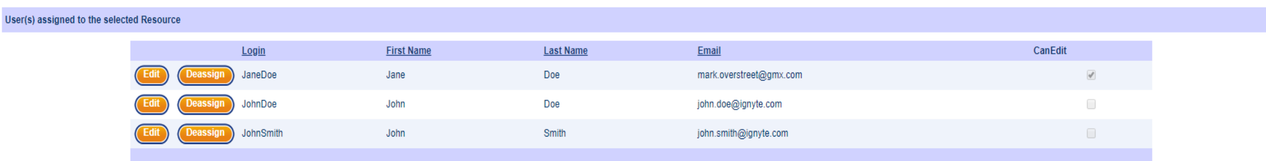
User(s) assigned to the selected Resource

		Login	First Name	Last Name	Email	CanEdit
Edit	Deassign	JaneDoe	Jane	Doe	mark.overstreet@gmx.com	☑
Edit	Deassign	JohnDoe	John	Doe	john.doe@ignyte.com	☐
Edit	Deassign	JohnSmith	John	Smith	john.smith@ignyte.com	☐

EDITING ASSIGNMENTS FOR RESOURCES:

To edit assignments for a specific resource, follow these steps:

1. Select your resource from the "Resources:" dropdown list at the top of the screen.



User(s) assigned to the selected Resource

		Login	First Name	Last Name	Email	CanEdit
Edit	Deassign	JaneDoe	Jane	Doe	mark.overstreet@gmx.com	☑
Edit	Deassign	JohnDoe	John	Doe	john.doe@ignyte.com	☐
Edit	Deassign	JohnSmith	John	Smith	john.smith@ignyte.com	☐

2. 

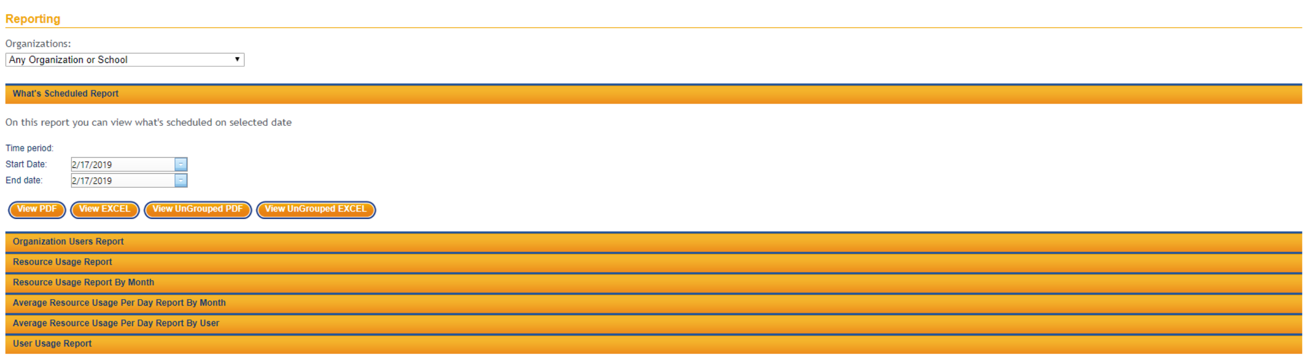
To Deassign a user, click the "Deassign" button next the user you are deassigning.

3. 

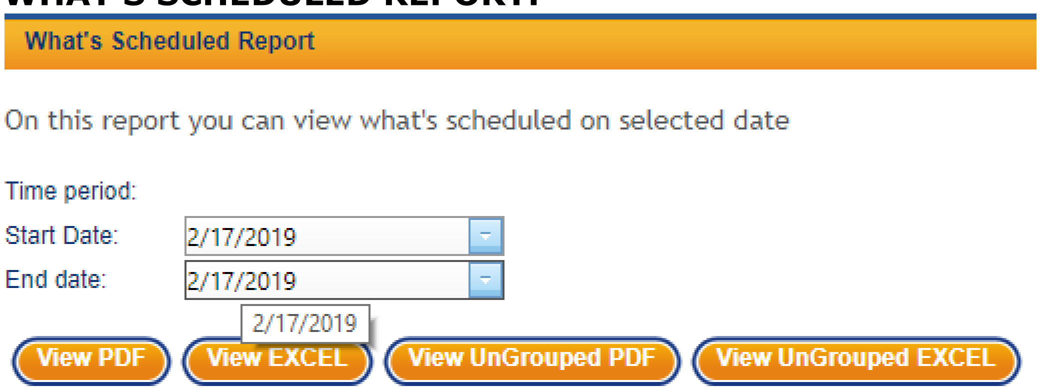
To Edit if a user can schedule the resource, click the "Edit" button and navigate to the "Can Edit" checkbox. If you would like to user to ONLY VIEW the resource but not schedule it, UN-CHECK the box. If you would like the user to BOTH VIEW AND SCHEDULE the resource, CHECK the box.

VIEW REPORTS:

The View Reports page lets you run various types of reports that could be useful to your organization. To see what reports you can run, and to get information on each one of them, see below.

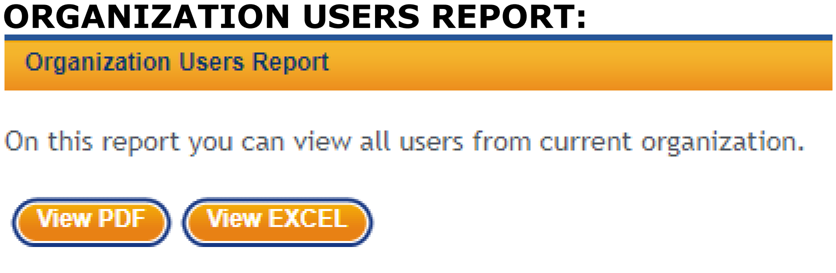


WHAT'S SCHEDULED REPORT:



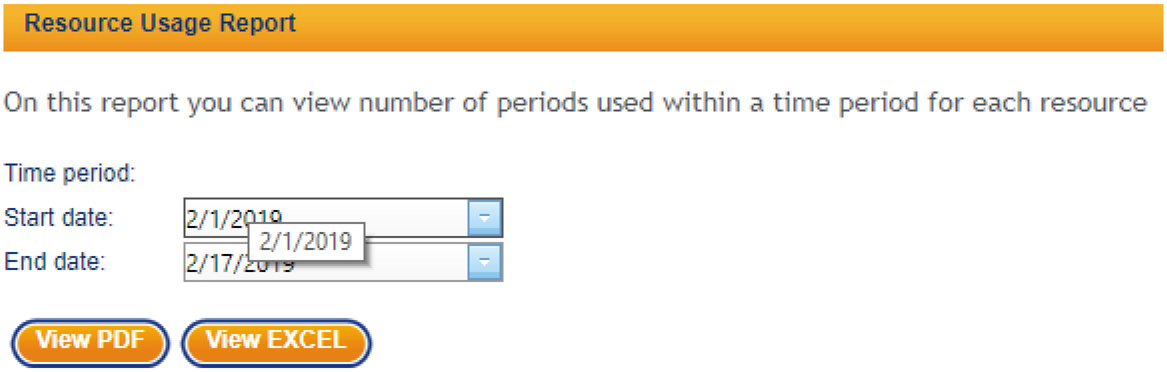
On this report you can view every resource that is scheduled on the date range specified. This is useful if you need to have a history of what users scheduled what resources. You can download these reports in PDF and Excel formats.

ORGANIZATION USERS REPORT:



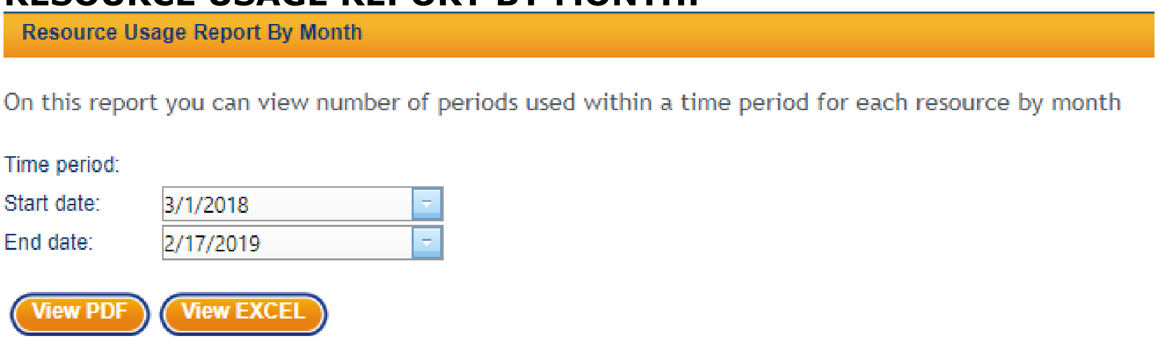
This report shows all users under the current organization. This can be viewed as a PDF or Excel spreadsheet.

RESOURCE USAGE REPORT:



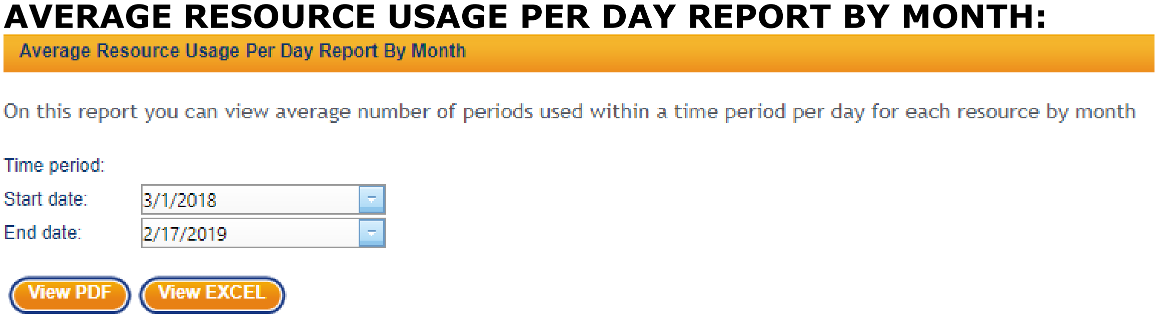
On this report you can view number of periods used within a time period for each resource. You may select the starting and ending date form this resource report as well choose whether to receive as a PDF or Excel spreadsheet.

RESOURCE USAGE REPORT BY MONTH:



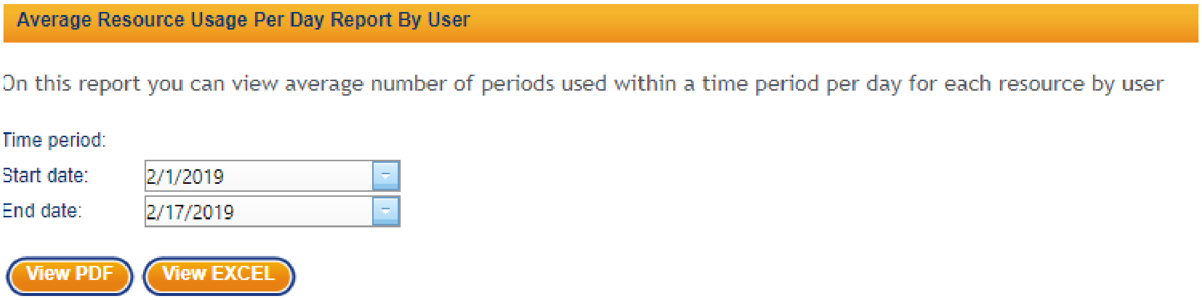
On this report you can view number of periods used within a time period for each resource by month. You may select the starting and ending date form this resource report as well choose whether to receive as a PDF or Excel spreadsheet.

AVERAGE RESOURCE USAGE PER DAY REPORT BY MONTH:



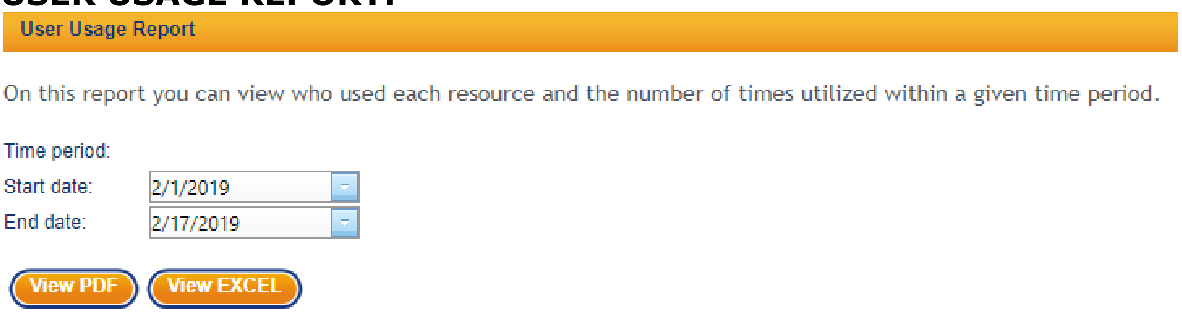
On this report you can view average number of periods used within a time period per day for each resource by month. You may select the starting and ending date form this resource report as well choose whether to receive as a PDF or Excel spreadsheet.

AVERAGE RESOURCE USAGE PER DAY REPORT BY USER:



On this report you can view average number of periods used within a time period per day for each resource by user. You may select the starting and ending date form this resource report as well choose whether to receive as a PDF or Excel spreadsheet.

USER USAGE REPORT:

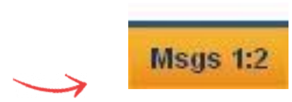


On this report you can view who used each resource and the number of times utilized within a given time period. You may select the starting and ending date form this resource report as well choose whether to receive as a PDF or Excel spreadsheet.

MESSAGES

While in LARS, you may find it necessary to communicate with the Users of your association.

If you look to the top right of the site you will notice a line of text within the text bar that looks like this:

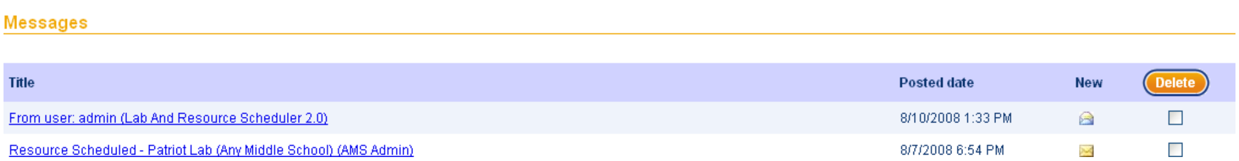


Now, the text on your bar might be different depending upon the number of messages in your mailbox. For instance, in my mailbox I have 2 messages total. You will see in the button representation the numbers 1:2 – this simply means that I have 1 message unread and 2 messages total.

Clicking on this link will take you directly into your message center and will show you all messages within your mailbox. As shown below, you will notice that the two messages are listed. The first message is similar to your first message which will of course be a "Welcome Message" from the main Administrator.

READING AND MANAGING MESSAGES:

You will notice that the first message has an <u>open</u> envelope and the second message has a <u>closed</u> envelope. The open envelope means that the message has been opened. Whereby, a closed envelope means the message has not been read yet.



Messages

Title	Posted date	New	Delete
From user: admin (Lab And Resource Scheduler 2.0)	8/10/2008 1:33 PM		
Resource Scheduled - Patriot Lab (Any Middle School) (AMS Admin)	8/7/2008 6:54 PM		

After reading your messages (or not), you can easily remove them from the system by placing a check in the checkbox to the right of your message (under the Delete button). Once you have chosen which message(s) to delete simply click the "Delete" button and they will instantly disappear.

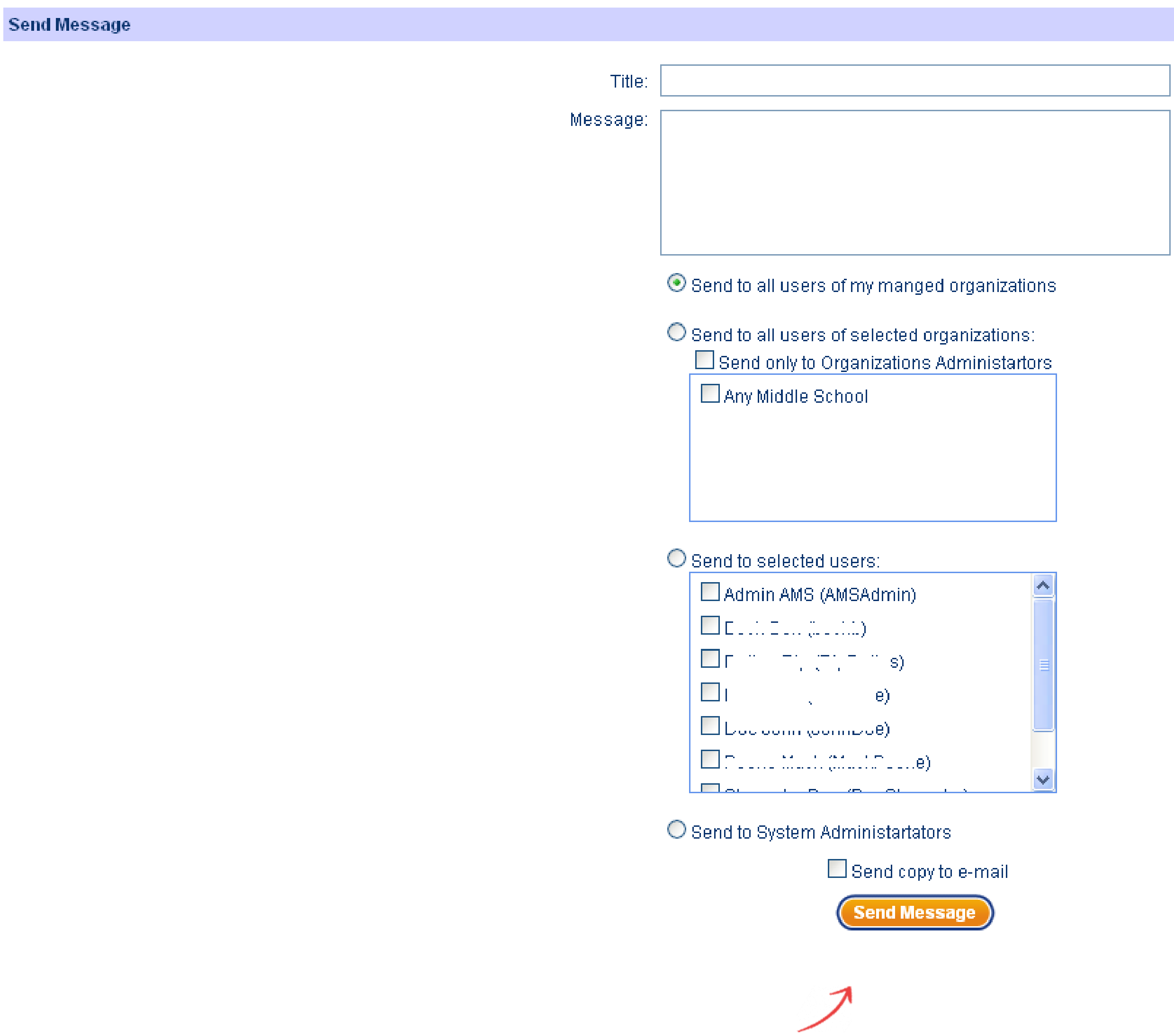
Be mindful that once you have opted to delete these messages, they will be immediately removed from the system they will no longer be able to be retrieved.

REPLYING:

If you find that at any time you need to post a message for an Administrator, Organization or User simply go to this location and begin by entering a title of your message in the Title bar.

Then simply enter your message in the message box. Now if you also want to send yourself a copy click the Send Copy to Email checkbox and you will receive a copy of the message you are sending to the Administrator(s).

Once complete click “Send Message” button.



If you also want to send yourself a copy of the messages, select the checkbox located just above the “Send Message” button.

CONTACT US | HELP

If you find yourself stuck or needing additional assistance, please contact your Administrator. If you find that is not an option or need help you are unable to find within this manual, please go to the Contact Us section of the website and leave us a detailed message. We will return messages as soon as they are received and can be answered appropriately. Please notice that items marked with a red asterisk (*) are mandatory fields which must be entered.

If you would like to browse the Self Help videos, please go to the Help section of the site. All videos are labeled accordingly and are expertly recorded for content.

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