User Guide
Scheduler add-on and LabCal

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1- INTRODUCTION

Thank you for choosing one of AgileBio's solutions for the management of your lab. **Scheduler add-on** is a web-based solution allowing efficient management of all your equipment booking in the lab. An unlimited number of reservations can be created. A reporting tool is included allowing equipment traceability. An equipment usage costs option can also be added for costs invoicing.

The **Scheduler add-on** is suitable for research projects and technical platform service activities. **Scheduler add-on** is fully integrated with **LabCollector**, the LIMS we developed for life science research labs and Biotech industries. Indeed, you can link information from LabCollector equipment database to a reservation.

Note that AgileBio also offers an autonomous version of the **Scheduler Add-on** called **LabCal**. LabCal is built on the LabCollector framework and can be used at a department or Institute scale. The only difference concerns the equipment and user database which are directly integrated in **LabCal** whereas in the **Scheduler add-on** these data are picked up from **LabCollector** database.

2- GETTING STARTED

You can get **Scheduler** add-on simply by downloading from www.labcollector.com. LabCollector software has to be installed first as it contains the framework. LabCollector support documents for installation are available on our website. **Scheduler add-on** can be installed on any operating system (Windows, MacOS X and Linux).

1/Automatic mode from LabCollector interface:

You can also use LabCollector Menu

Admin > Setup > Upload/Add Addons > Upload Addon ZIP > Add Addon

Return to LabCollector, the **Scheduler add-on** module is now activated. Click on the module to finish the installation.

2/Manual mode:

Unzip and paste the **Scheduler add-on** folder in the extra modules folder. For Windows it would look like:

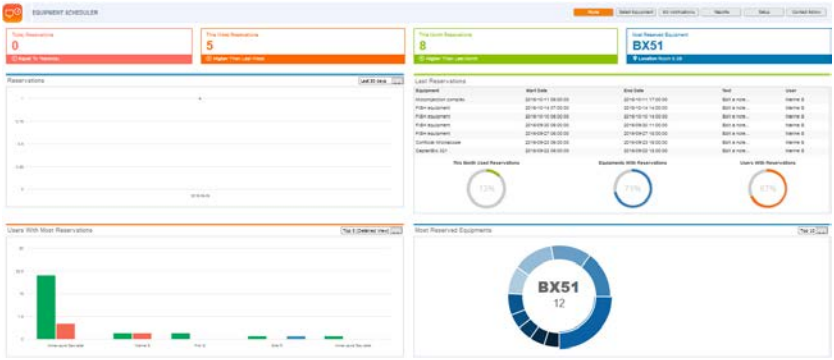
C:\Programs\AgileBio\LabCollector\www\lab\extra_modules\scheduling

Open LabCollector, the Scheduler add-on module is now activated. Click on the module to finish the installation.

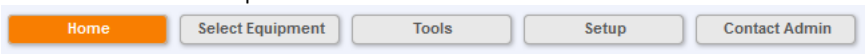
The add-on will remain in a 30 days free trial mode until you save the final license in **Setup > License**. To obtain a valid license, you have to copy and send the activation key from **Setup > License** menu to AgileBio.

3- OVERVIEW

The Scheduler's home page offers you an overview of statistics on reservations: the number of reservation for the current month and the current week, and the most reserved equipment.

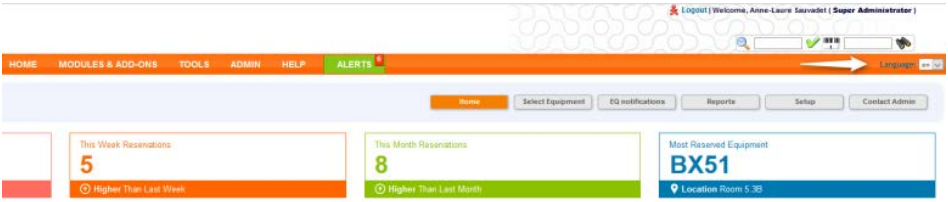


Scheduler's menu is composed of 5 main tabs:

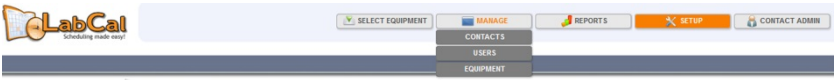


- The equipment finder, "Select Equipment"
- The equipment tools with: Reservation info, EQ notifications and a reporting tool
- The setup option with sub-menu relative to permission level:
    - *For all except Visitor* : My favorites
    - *For super-administrator only* :
        - Equipment and alerts setup
        - Equipment maintenance
        - Users setup
        - Reservation administrators setup
        - Reservation time limit setup
        - Multiple reservation setup
        - Scheduler setup
        - Equipment usage costs definition
        - Custom fields creation
        - License
- The "Contact Admin" button allows users to contact their super-administrator

Note that **Scheduler add-on** is available in English, French and Portuguese languages. Switch from one language to another using the language select list on the upper right of the screen. The orange bar menu is related to the **LabCollector** framework.



As a **LabCollector** independent version, **LabCal** integrates another tab to manage contacts, users and equipment.



4- SETUP

4-1. My favorites

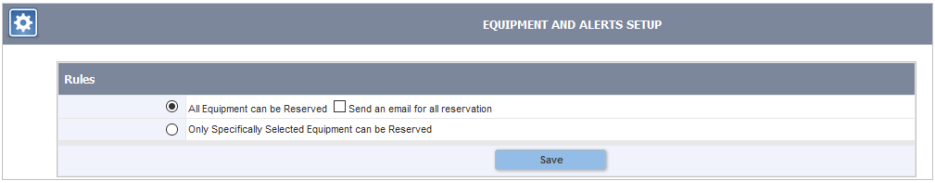
Each user can define favorite equipment to quickly access to his list when he needs to reserve equipment. From **Setup > My Favorites** do the following:

1. Activate the option
2. Search for your equipment (by name, serial number or location) or
3. Select each favorite equipment
4. Save

Additional related information in chapter 5-1.

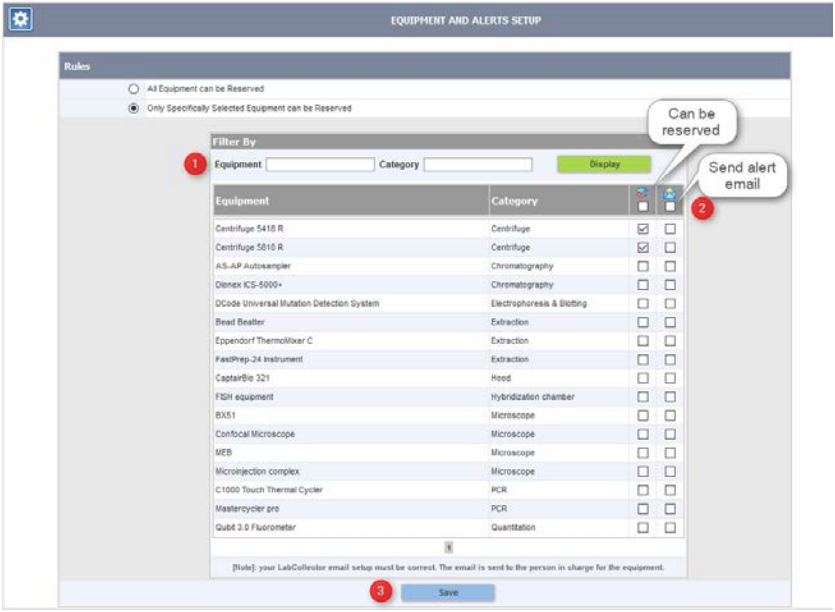
4-2. Equipment and alerts

The super-administrator can choose to allow the reservation of all the lab equipment or select only some equipment that can be reserved. Each time equipment is reserved, the person in charge can receive an email alert of reservation, just tick the box ‘Send an email for all reservation’ and save the choice.



With the second option, you just have to:

1. Search for the equipment or category of equipment (autocomplete fields)
2. Select the equipment accessible to the reservation. The same option of sending an alert email when the equipment is reserved is also possible.
3. Save

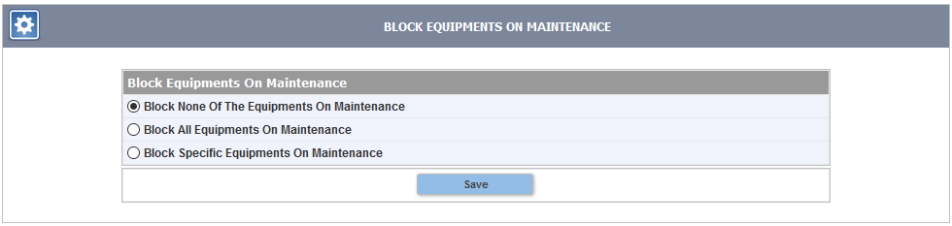


Users will thus have a restricted list of equipment.

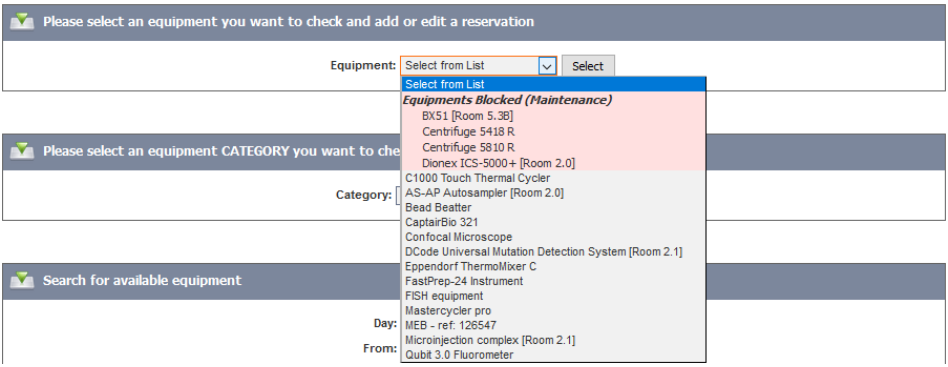
4-3. Equipment in maintenance

Three options are possible to block equipment on maintenance:

- No blockage, all equipment can be reserved
- All equipment in maintenance in Equipment module are blocked
- Super-administrator can block specific equipment in maintenance



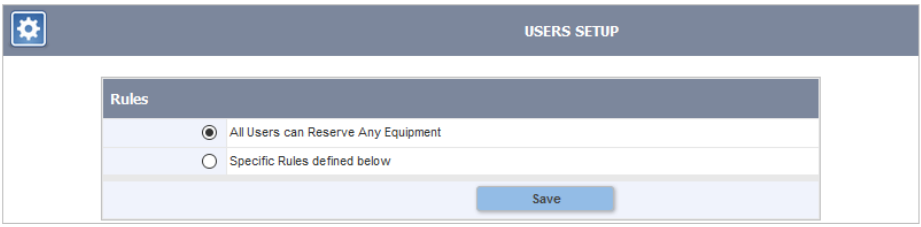
Blocked equipment cannot be reserved.



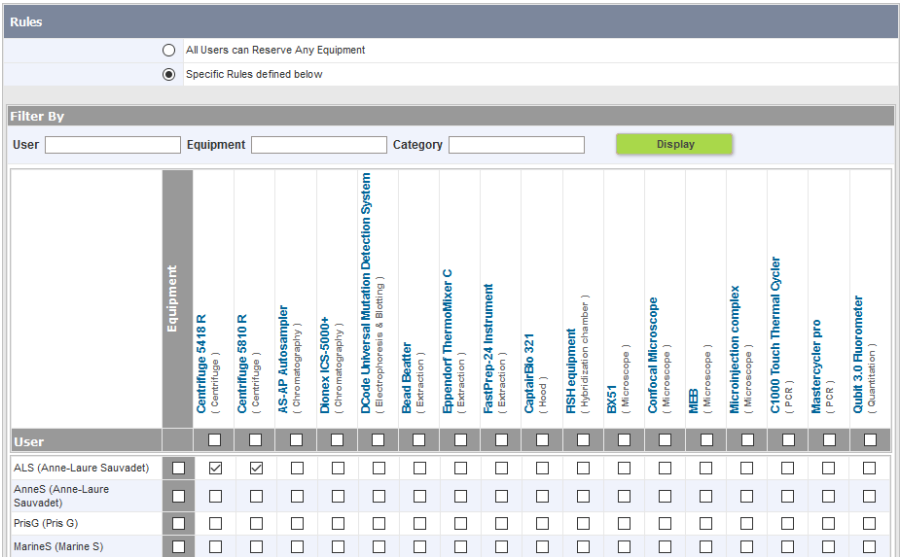
4-4. Users

Two options are offered:

- All users can reserve any equipment
- Or super-administrator can defined specific rules



In fact, with this second option, the super-administrator can restrict access to some user or group of user to some equipment or category of equipment. You just have to click in the right boxes. To select an entire row or column, use boxes just near the user name or the equipment respectively. Validate your choice by clicking on Save.

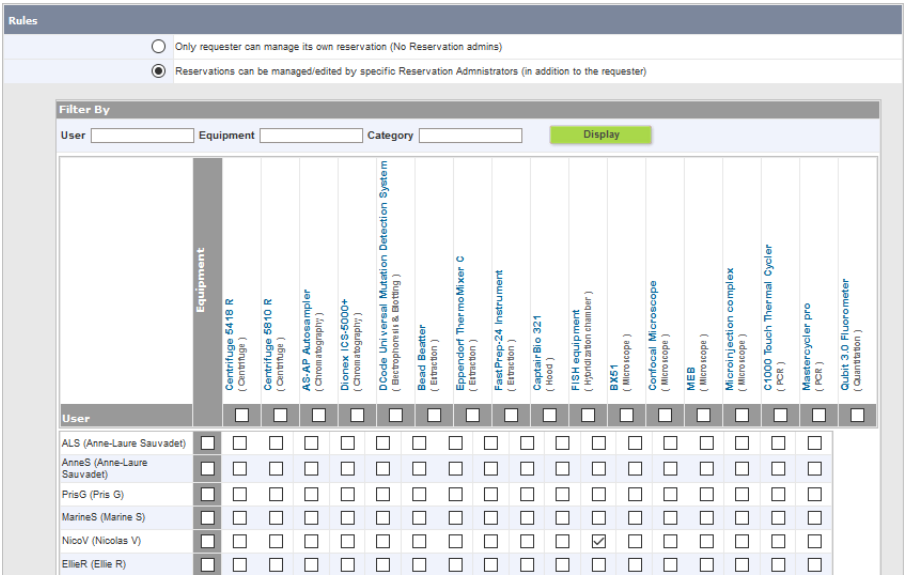


Here, for example, ALS user can only reserve two centrifuges.

4-5. Reservation administrators

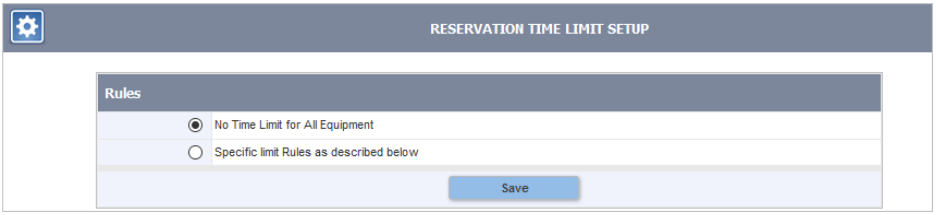
This function helps you to configure equipment reservation management. Equipment reservation can be managed by their requester ONLY or by their requester AND specific users to define.

As above, you just have to click in the right boxes. To select an entire row or column, use boxes just near the user name or the equipment respectively. Validate your choice by clicking on Save.

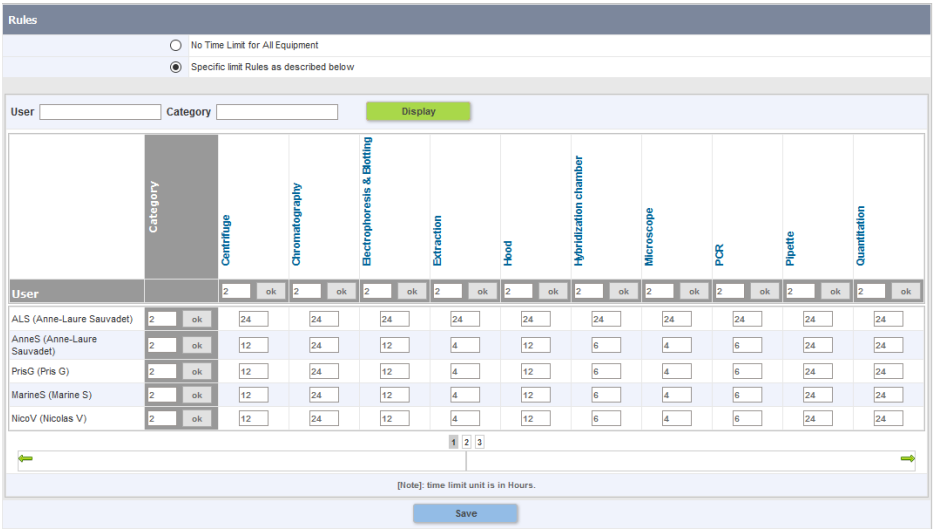


4-6. Reservation time limit

To configure users' reservations time limits for each equipment category.
You can define that there is no time limit for all category or define specific time limits per category per user.



You need to enter time limits values as hours. Times such as 0.25 or 1.5 hours are allowed.
If you need to define time limits for all users or for all equipment categories, you can fill the grey box and click on ok button. This function allows you to fill all boxes with the same time limit. Click on the **Save** button to validate.

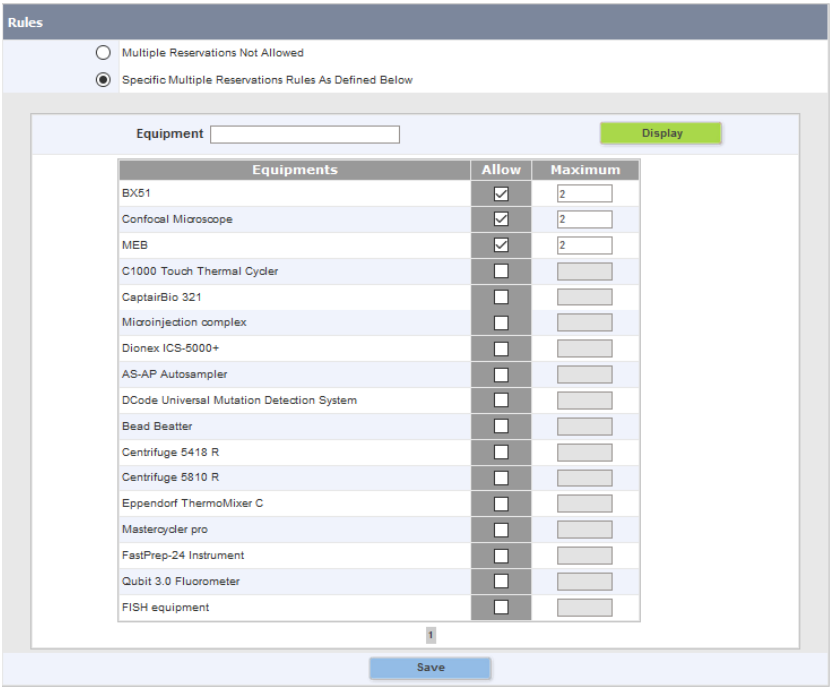


For more information, please read page 20.

4-7. Multiple reservation

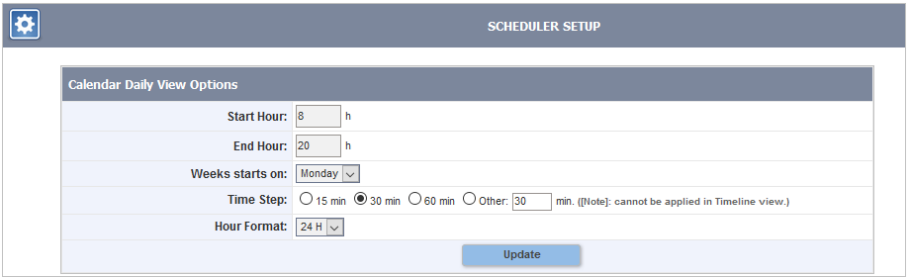
The LabCollector scheduler offers you to allow multiple reservations at the same time for the same equipment. If necessary, the super-administrator can cancel one of them.

If you choose this option, you have to define which equipment can deal with multiple reservations (check the box in *Allow* column) and the number of reservations possible at the same time (Value under *Maximum* column). Save to validate your action.



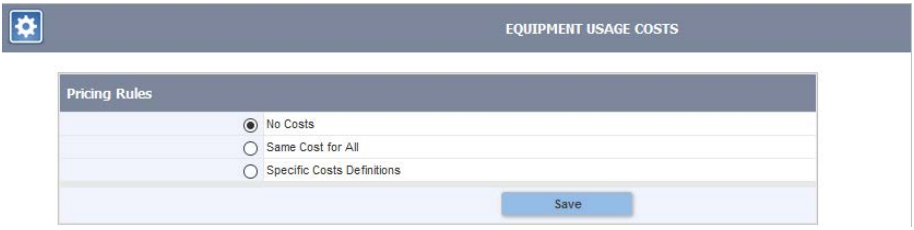
4-8. Scheduler

In this section, you can configure time slots reservations for equipment booking. You can define the day which the week starts, time step as well as hour format.
Click on **Update** button to validate.



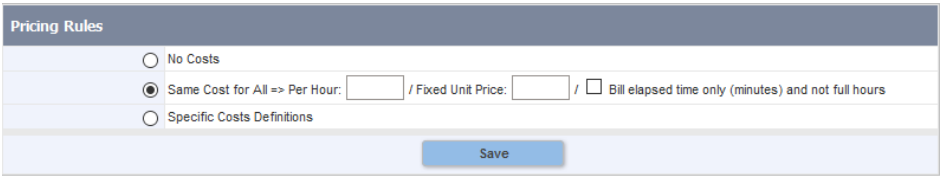
4-9. Equipment usage costs (option with fees)

This section could interest service laboratories or platforms that charge for the use of their equipment. This may also be useful for labs or departments that use internal recharge.

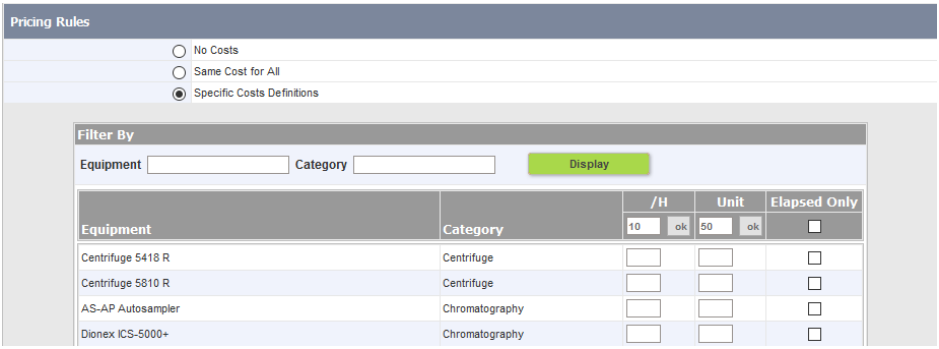


You can choose between:

- No costs (by default).
- **Same cost for all**: same price per hour or fixed unit price for all the equipment. You can charge minutes per minutes by checking the box for *Bill elapsed time only and not full hours*.



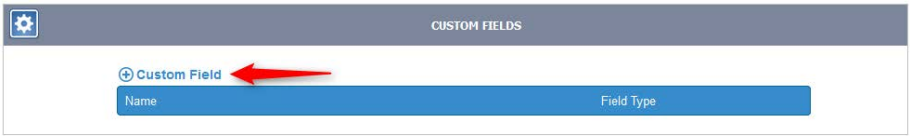
- **Specific costs definitions**: specific prices per hour or per reservation unit can be defined for each equipment. Again, check the box *Elapsed only* to charge per minutes. This choice allows for only fixed costs, only hourly costs or fixed plus hourly costs.



Click on **Save** button to validate.
Equipment usage costs option can be correlated with billing reports (see section 6-3).

4-10. Custom fields

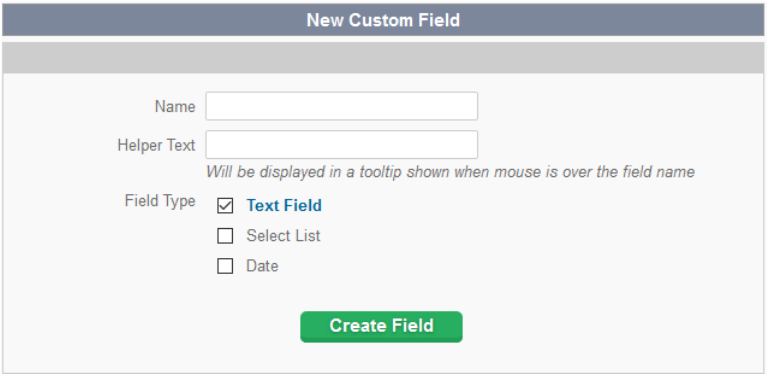
Custom fields can be created to add some information to the reservations. Click on **Custom fields** link.



On the same format that custom fields for LabCollector, you can here create 3 types of custom fields:

- Text field
- Select list
- Date

Click on **Create Field** button after filling the form to validate.



Once created, all the custom fields can be deleted with the icon. To configure your select list, click on and add values.

See the section 6-1 for details on using these custom fields.

4-11. License

From this screen, the super-administrator can manage the **Scheduler** license.
A new license key is needed for critical updates or when the lab decides to switch from the demo to the commercial version.
Moving the application to another machine (PC or server) also requires a new **Scheduler** License.

Send your **machine key** at support@agilebio.com and when you receive your license, copy/paste it under *Enter a New License Number* and do **Save License**.

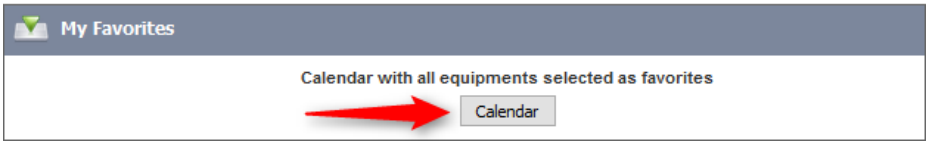
5- EQUIPMENT BOOKING

There are several ways to make a reservation with the **Scheduler** add-on through **Select Equipment** menu. Indeed, users can choose to select from favorite equipment, equipment directly or by equipment category. Another possibility is to find available equipment by date or period of interest and equipment category.

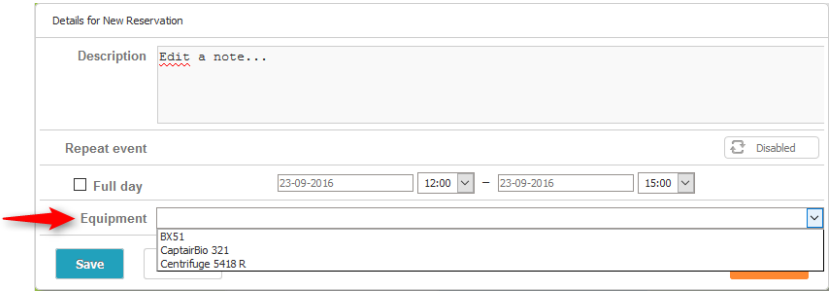
5-1. Reservation using *My Favorites*

Chapter 4-1 explains how to configure your favorites.

Now, when you want to have an overview or reserve one of your favorite pieces of equipment, in **Select Equipment** menu, you just have to click on **Calendar.** All your favorite apparatus are listed in the calendar view.



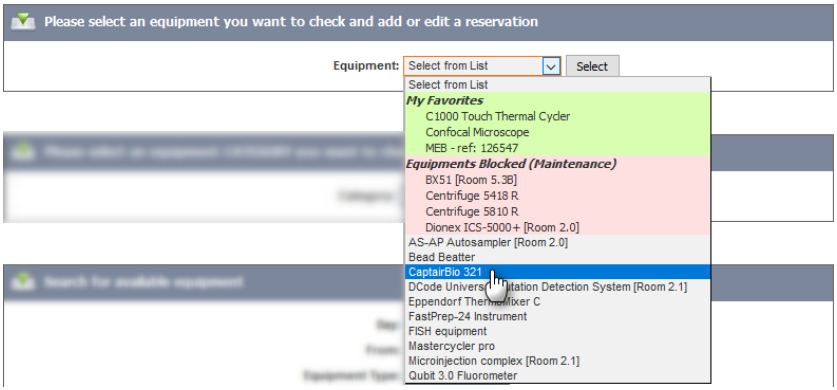
If you want to reserve, just choose your day and time (by drag and drop) and in the reservation form, select your equipment in the select list.



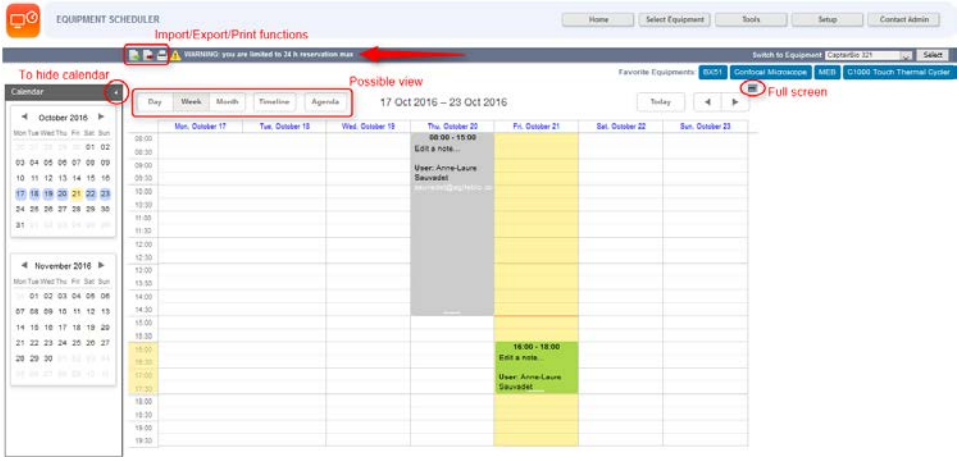
When you select an equipment which is not in your favorite, your favorite equipment is listed as a series of tags for quick access in the top right.

5-2. Reservation using equipment selector

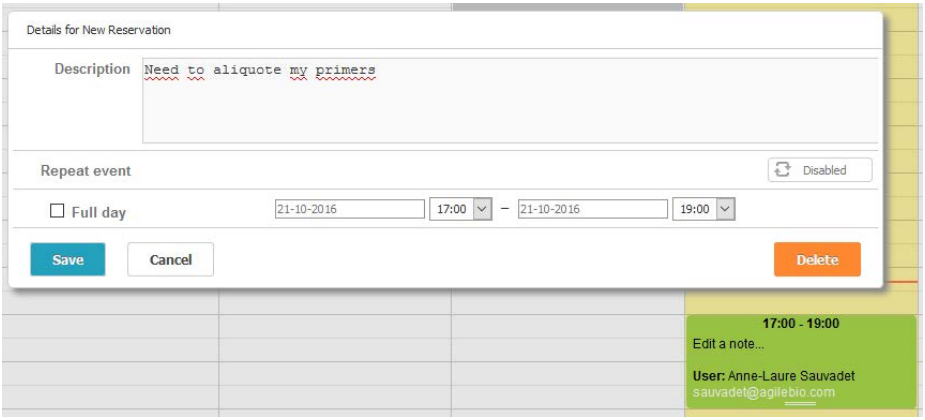
Users can directly select equipment in the equipment list.



Equipment reservations scheduler is now displayed. More functions are available on this screen: calendar view (current and next month), 5 possible views, and full screen view. You can also change the equipment on the top right.



Reservations can directly be made by selecting time periods on the scheduler. Just choose your start hour and drag and drop until the end.
A reservation window opens.

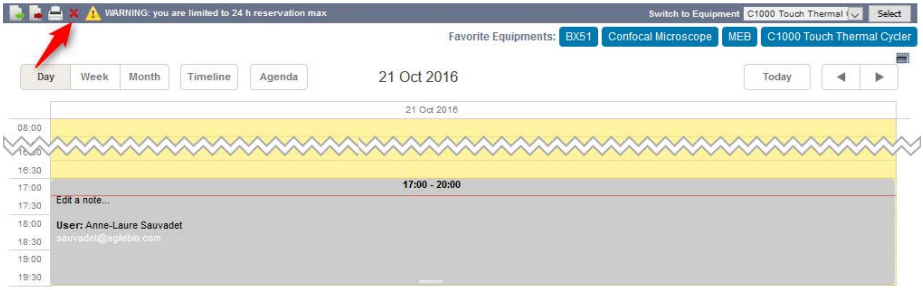


Fill the form: description, reservation recurrence (disabled/enabled button) and save it.

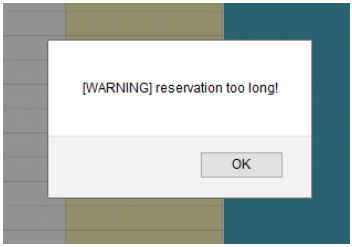
Your reservation is saved. If you click on it, a list of icons appears on the left. You can then access to (in order):

- Reservation additional information (see the chapter 6-1)
- Reservation details (form)
- Description edition
- Deletion button (with confirmation)

An active reservation can also be quickly modified (in time) by drag and drop.
All the past reservation are in grey and cannot be altered. Except, if for example you finish your job before the end time, you can “kill” the reservation using the red cross on the top of the scheduler view.

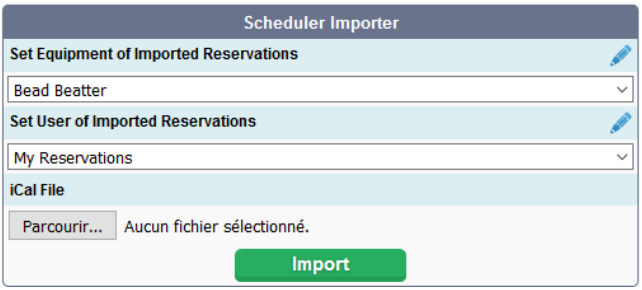


As you can see on the main screenshot, if reservation time limit is activated (see chapter 4-6), a message alerts that the user cannot reserve more than the time limit on the top of the scheduler. Moreover, if the user tries to reserve beyond the time limit, a popup message appears.



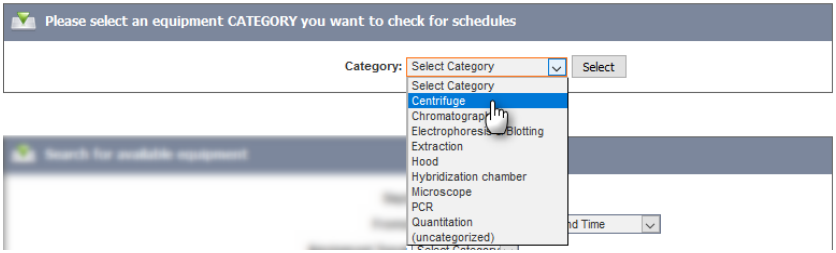
Your scheduler can be exported and/or printed in PDF. Just use the icons on the bottom left respectively and .
To export, just check the form (if you are in category, you can change the category) and you can also choose for all users or one of them with the icon . Export your scheduler in iCal format.

In the same way, you can import a scheduler in LabCollector Scheduler using the icon . Fill the form and upload your iCal file to import it.



5-3. Reservation using category selector

Reservations can be made using the equipment category selector.

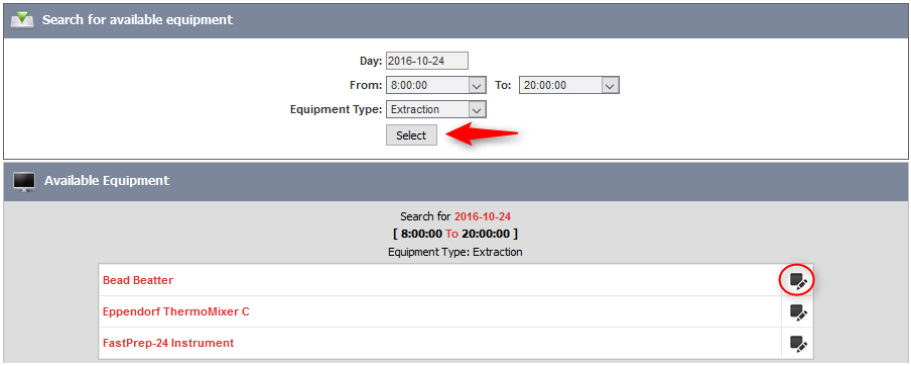


The reservations scheduler of the selected equipment category is now displayed. Create reservations by selecting equipment and by clicking and dragging on the calendar.

You can quickly change start/end dates by drag & drop. To have more information on the reservation, modify it or delete it, click on the equipment reserved to go back to the view by equipment (see chapter 5-2).

5-4. Reservation using available equipment finder

With this option, users can define a date, time and an equipment category. Regarding these settings, the **Scheduler** add-on automatically finds available equipment in the category. To make a reservation, users have to click the icon. Then select the desired time in the calendar. Make notes about the reservation if desired.

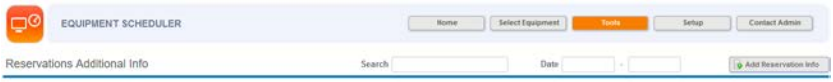


6- TOOLS

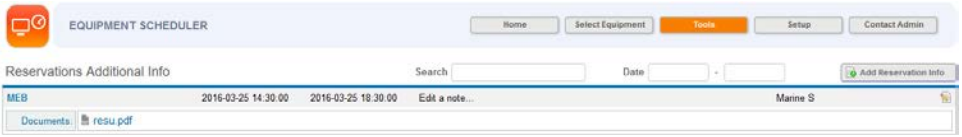
The **Scheduler** add-on has some tools to help you deal with reservations. You can add more information with the help of custom fields, notify some remarks on equipment and create reports.

6-1. Reservations additional information

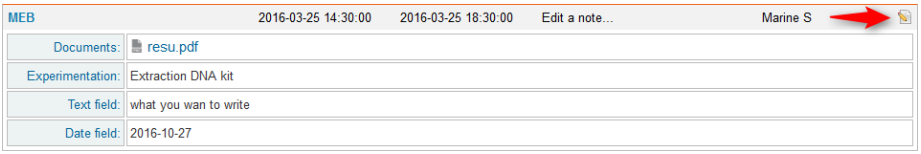
Using the menu **Tools > Reservations Info**, you can access to a form (Add reservation info) to add some additional information on a reservation.



You can quickly access additional information on your equipment reservation by using the icon on the left.

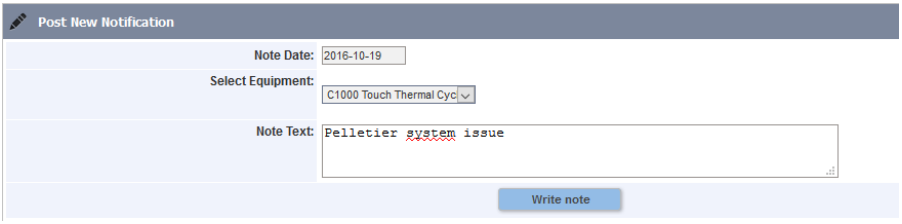


By default, you access a form where you can upload/download a document. You can also add more data by using the custom fields option (see chapter 4-10) and edit the form by clicking .

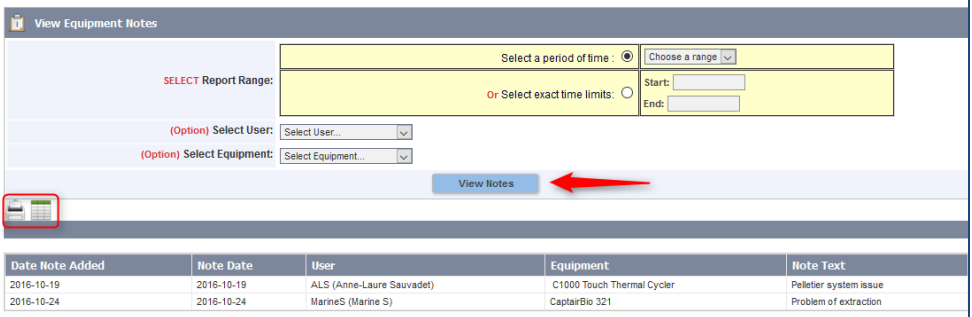


6-2. Equipment notifications

Through this menu, each user can create equipment notifications.
To write a new note, select the date, the equipment, and add text using the editor (max 140 characters) and click on **Write report** to validate.



The super-administrator has the possibility to retrieve reports of equipment notifications and print or export them (icon on the left). A search can be made selecting a time period or exact time limits and use options to add search filters like user and/or equipment.

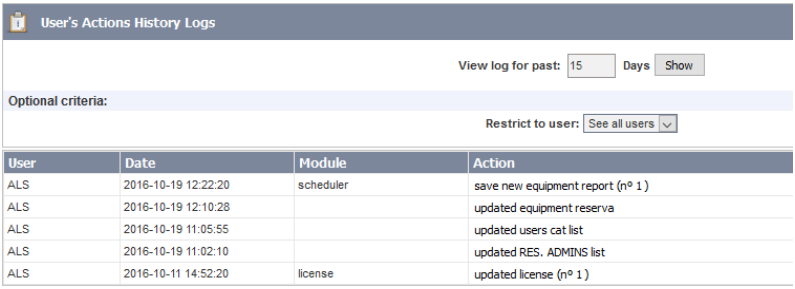


Date Note Added	Note Date	User	Equipment	Note Text
2016-10-19	2016-10-19	ALS (Anne-Laure Sauvadet)	C1000 Touch Thermal Cycler	Pelletier system issue
2016-10-24	2016-10-24	MarineS (Marine S)	CaptairBio 321	Problem of extraction

6-3. Reservation report

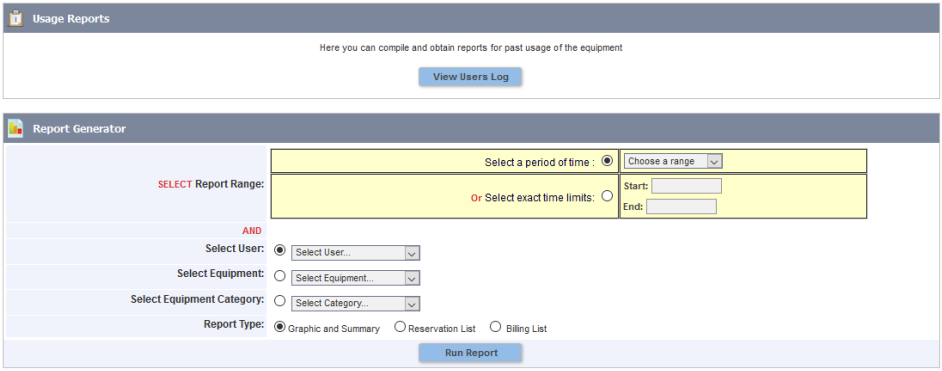
This reporting tool allows equipment activities and traceability follow up.

Quickly, the first option is to have users view past usage only. You can restrict your search to by user, equipment or equipment category in combination with a time period.



User	Date	Module	Action
ALS	2016-10-19 12:22:20	scheduler	save new equipment report (nº 1)
ALS	2016-10-19 12:10:28		updated equipment reserva
ALS	2016-10-19 11:05:55		updated users cat list
ALS	2016-10-19 11:02:10		updated RES. ADMINS list
ALS	2016-10-11 14:52:20	license	updated license (nº 1)

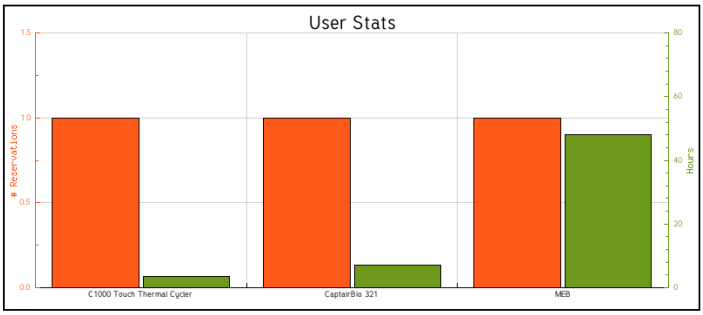
Then you can choose to create more complete reports. Reports can be generated for a time range which can be in the past or in the future as well as exact time limits. You can also select a user or an equipment or equipment category.



Three reporting formats are available:

- Graphic and summary
- Reservation list
- Billing list. Billing list acquisition is only available for lab having the equipment usage costs option (see chapter 4-9).

The graphical report shows equipment and users reservations and a summary (total number of reservations and total number of hours). A paper version can be printed.



Equipment	Category	# Reservations	Hours of reservations
C1000 Touch Thermal Cycler ()	PCR	1	3.5
CaptairBio 321 ()	Hood	1	7
MEB ()	Microscope	1	48
Total		**3**	**58.5**

The reservation list report contains all reservations made by a user or all reservations made by equipment or for one equipment category. This list can be exported in a table (Excel) for further statistical analyses. A paper version can also be printed.

Date	Start Time	End Time	Equipment	Category	Location	Description	User
20-10-2016	12:00:00 AM	12:00:00 AM	MEB	Microscope		resa	ALS (Anne-Laure Sauvadet)
20-10-2016	08:00:00 AM	03:00:00 PM	CaptairBio 321	Hood			ALS (Anne-Laure Sauvadet)
19-10-2016	02:00:00 PM	05:30:00 PM	C1000 Touch Thermal Cycler	PCR			ALS (Anne-Laure Sauvadet)

The billing list report contains all reservations made by a user or all reservations made for one equipment or one equipment category with the hour of reservations and their costs. This list can be exported in an excel format. A paper version can also be printed.

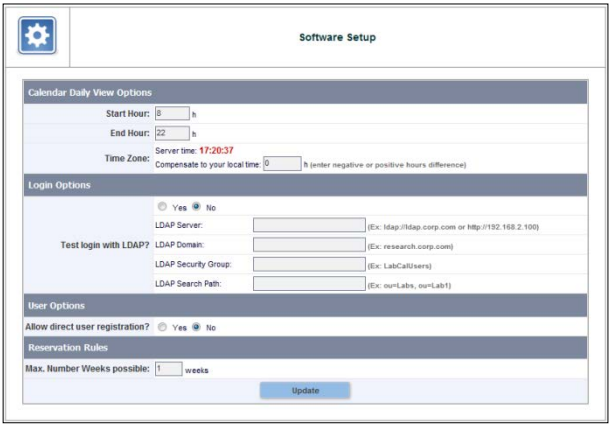
Equipment	Category	# Reservations	Units Costs	Hours of reservations	Hourly Costs
C1000 Touch Thermal Cycler ()	PCR	1	**0**	3.5	**10.5**
CaptairBio 321 ()	Hood	1	**0**	7	**21**
MEB ()	Microscope	1	**0**	48	**144**
Total		**3**	**0**	**58.5**	**175.5**

7- LABCAL

LabCal is an autonomous application. Indeed, when using **Scheduler** add-on, contacts, users and equipment data are already managed in LabCollector LIMS. If you are using the **Scheduler** as a LabCollector add-on, skip this chapter.

7-1. Setup

All **Scheduler** add-on settings are available in **LabCal**. A few parameters were added like LDAP option and reservation rules. This protocol allows user login and password authentication. The administrator also defines if users can create an account by themselves or not.

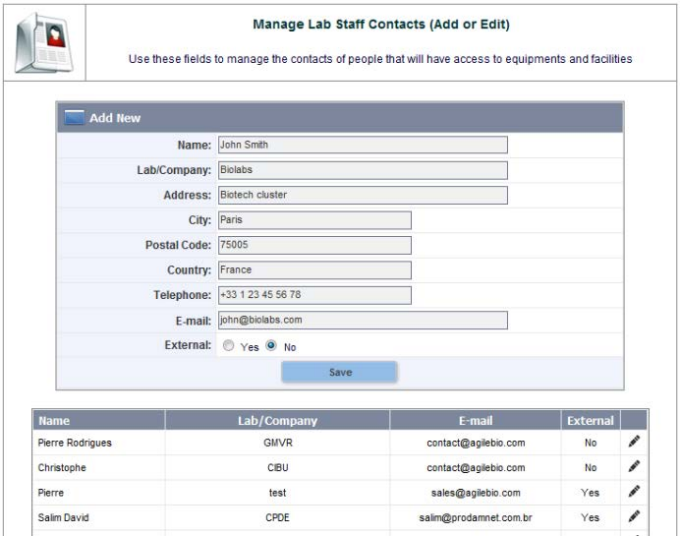


7-2. Manage Tab

7-2-1. Manage contacts

The administrator has to create all contacts that will have access to equipment and facilities. This step isn't necessary if users are allowed to create their own profiles directly (see chapter 4-4).

Some fields like a name and a complete address are required to create a contact profile. People can be identified as internal or external user.
Once edited, a contact profile can be modified or deleted.
A list of all contacts is displayed on this page.



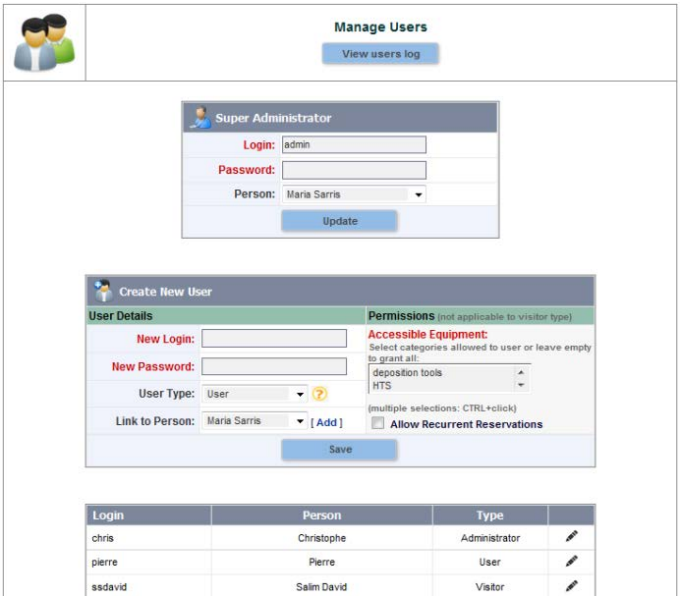
7-2-2. Manage users

The user page is dedicated to users' accounts creation. Accounts creation has to be made by the super-administrator.
A login and a password are required to use **LabCal**. Each account is linked to a contact profile.

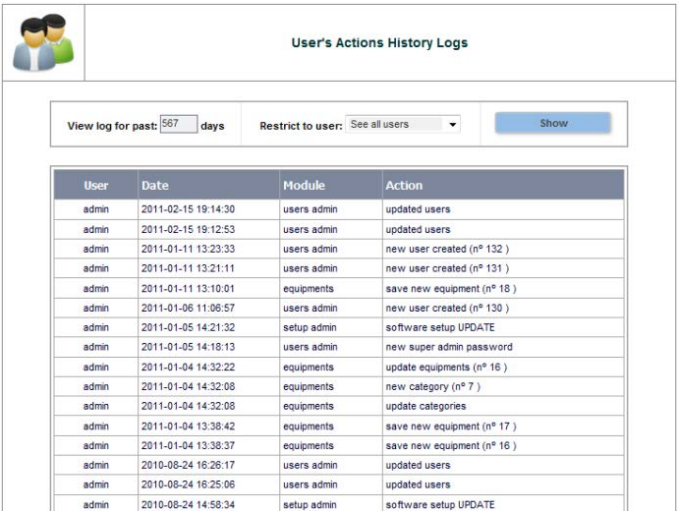
Different statuses are available:

- Administrator: can make reservations and have an access to the Setup and Manage tabs.
- User: can make reservations.
- Visitor: can only see reservation schedules.

The super-administrator can define if users are allowed to make recurrent reservations. He can also specify which equipment categories can be booked. Once edited, a user profile can be modified or deleted.
A list of all users is displayed on this page.



The super-administrator can edit users' history log actions using the **View users log** button. Two filters are available to display history log: time period (in days) and user name.



User	Date	Module	Action
admin	2011-02-15 19:14:30	users admin	updated users
admin	2011-02-15 19:12:53	users admin	updated users
admin	2011-01-11 13:23:33	users admin	new user created (n° 132)
admin	2011-01-11 13:21:11	users admin	new user created (n° 131)
admin	2011-01-11 13:10:01	equipments	save new equipment (n° 18)
admin	2011-01-06 11:06:57	users admin	new user created (n° 130)
admin	2011-01-05 14:21:32	setup admin	software setup UPDATE
admin	2011-01-05 14:18:13	users admin	new super admin password
admin	2011-01-04 14:32:22	equipments	update equipments (n° 16)
admin	2011-01-04 14:32:08	equipments	new category (n° 7)
admin	2011-01-04 14:32:08	equipments	update categories
admin	2011-01-04 13:38:42	equipments	save new equipment (n° 17)
admin	2011-01-04 13:38:37	equipments	save new equipment (n° 16)
admin	2010-08-24 16:26:17	users admin	updated users
admin	2010-08-24 16:25:06	users admin	updated users
admin	2010-08-24 14:58:34	setup admin	software setup UPDATE

7-2-3. Manage equipment

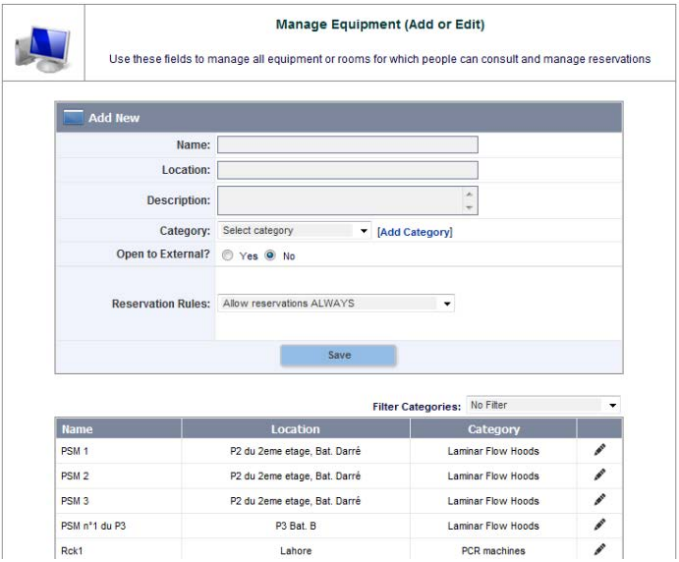
New equipment can be edited and managed from this screen. Equipment is defined by its name, location and category. Creating categories is useful to find equipment quickly.

Tips: the easy way to create an equipment category is to gather identical equipment (all plate readers, all PCR machines…). You can also define equipment categories by equipment location if equipment are in different rooms or buildings.

Reservations rules can be added:

- Allow Reservations ALWAYS: Default setting.
- Allow Reservations FROM n weeks before date: Reservations can only be made between n weeks before and the effective date.
- Allow Reservations UP TO n weeks before date: Reservations can't be made between n weeks before and the effective date. Booking can only be made before this time period.

Once equipment is integrated in the database, it's displayed in the equipment list. Equipment information can be modified or deleted if necessary.


Manage Equipment (Add or Edit)
Use these fields to manage all equipment or rooms for which people can consult and manage reservations
Add New
Name:
Location:
Description:
Category:
Select category
[Add Category]
Open to External?
Yes
No
Reservation Rules:
Allow reservations ALWAYS
Save
Filter Categories:
No Filter
Name
Location
Category
PSM 1
P2 du 2eme etage, Bat. Darré
Laminar Flow Hoods
PSM 2
P2 du 2eme etage, Bat. Darré
Laminar Flow Hoods
PSM 3
P2 du 2eme etage, Bat. Darré
Laminar Flow Hoods
PSM n°1 du P3
P3 Bat. B
Laminar Flow Hoods
Rck1
Lahore
PCR machines

8- UPGRADING AND UPDATING

To update or upgrade the **ELN Add-on** module, just download it from our website (www.labcollector.com). Then, unzip the folder and paste files in the following folder:

```
Programs\AgileBio\LabCollector\www\lab*\extra_modules\scheduling
```

*The name of this folder is the laboratory nickname chosen during LabCollector installation.

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