

Creating a Scheduler

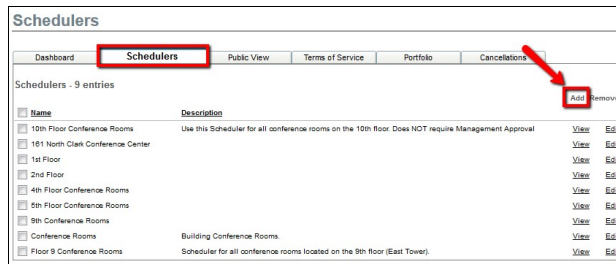
[Control Panel](#) > [My Workspace](#) > [Schedulers](#) > [Schedulers Tab](#)

Creating a Scheduler:

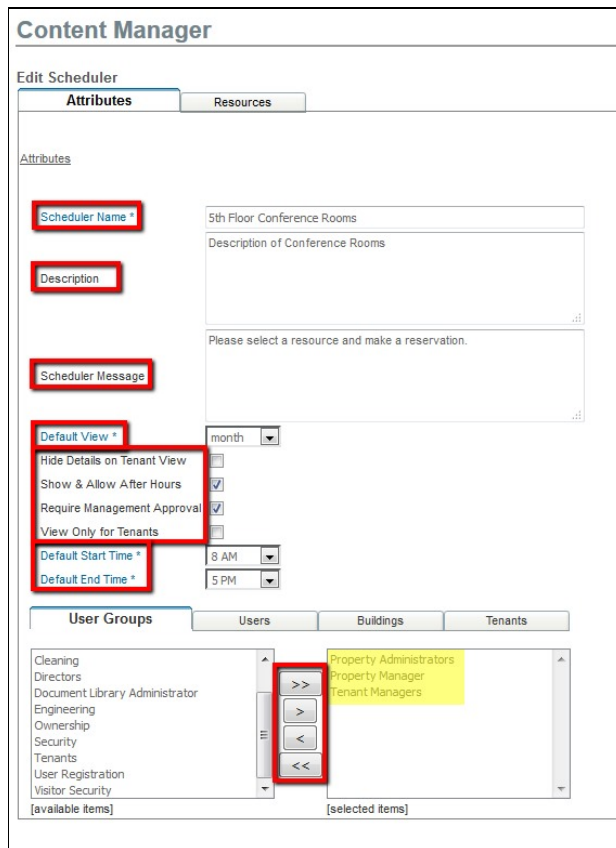
Note:

- First, we create a scheduler, which is more or less an umbrella for the resources and layouts. Therefore, a scheduler (i.e. 5th Floor Conference Rooms) holds the resources that can be booked (i.e. Conference Rooms 501, 502, 503, and 504).

1. Go to **Control Panel > My Workspace > Schedulers**.
2. Click on the **Schedulers** tab.
3. Click on **Add**.



4. Fill in the **Attributes** for the scheduler:



Required Information

- **Scheduler Name:** Name for the scheduler.
- **Description:** Description of the scheduler. Tenants will *not* see this description and it is mainly used for internal use only.
- **Scheduler Message:** Will display for tenants on the calendar view.

Note:

- This can be a note to the tenants, such as: "Please contact management if you have any questions."
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- **Default View:** Will open the calendar in the selected view (day, week, or month).
 - **Hide Details on Tenant View:** Prevents tenant users from being able to view the details of other tenant users' requests.
 - **Show & Allow After Hours:** Allows tenants to make a reservation outside of the resources' start and end times.
 - **Require Management Approval:** If selected, then a staff member (i.e. Property Manager) must approve the reservations; otherwise, if this is unchecked, the events will automatically be approved.
 - **View Only for Tenants:** Allows tenants to only *view* current reservations and does *not* allow them to make a reservation themselves. All reservations will need to be made by the staff only.
 - **Default Start/End Time:** This will be the default time range availability for all resources within the scheduler.
 - **Permissions:** Select the User Group(s), User(s), Building(s), and/or Tenant(s) that can access the scheduler via the My Workspace page.

5. Click on **Submit** to save the scheduler.

Note:

- Before a scheduler can be viewed from the My Workspace page, at least one resource must be added.
- Recall that we first had to create the scheduler, which is more or less an umbrella for the resources. Therefore, a scheduler (i.e. 5th Floor Conference Rooms) holds the resources that can be booked (i.e. Conference Rooms 501, 502, 503, and 504).

6. Click on the **Resources** tab.

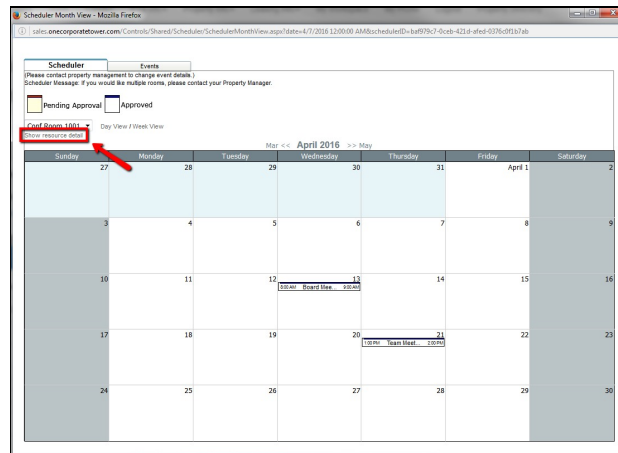
7. Click on **Add**.

The screenshot shows the 'Content Manager' interface. At the top, there is a 'Required Information' section with 'Submit', 'Cancel', and 'View' buttons. Below this is the 'Edit Scheduler' section, which contains a blue bar with the text 'Scheduler Created'. Underneath, there are two tabs: 'Attributes' and 'Resources', with 'Resources' being the active tab. Below the tabs, there is a message: 'At least one resource is needed for user to schedule for events.' At the bottom of the interface, there is a table with columns for 'Name', 'Start Time', 'End Time', 'Available', and 'Unavailable Reason'. To the right of the table, there is an 'Add' button with a red arrow pointing to it, and a 'Remove' button next to it. At the very bottom, there is another 'Required Information' section with 'Submit', 'Cancel', and 'View' buttons.

8. Fill out the **Resource Attributes**:

The screenshot shows the 'Attributes' form in the Content Manager. The form is divided into several sections: 'Resource Name', 'Description', 'Start Time', 'End Time', 'Available', 'Allow Double Booking', 'Allow Bill to Suite', 'Allow Recurring Events', 'Max Range for Reservation', 'Allow Weekend', 'Block Requests prior to Scheduled Events within', 'Block Requests post Scheduled Events within', 'Resource Image', and 'Resource Document'. A red box highlights the 'Resource Name', 'Description', 'Start Time', 'End Time', 'Available', 'Allow Double Booking', 'Allow Bill to Suite', 'Allow Recurring Events', 'Max Range for Reservation', 'Allow Weekend', 'Block Requests prior to Scheduled Events within', 'Block Requests post Scheduled Events within', and the 'Submit' button. The 'Submit' button is also highlighted with a red box.

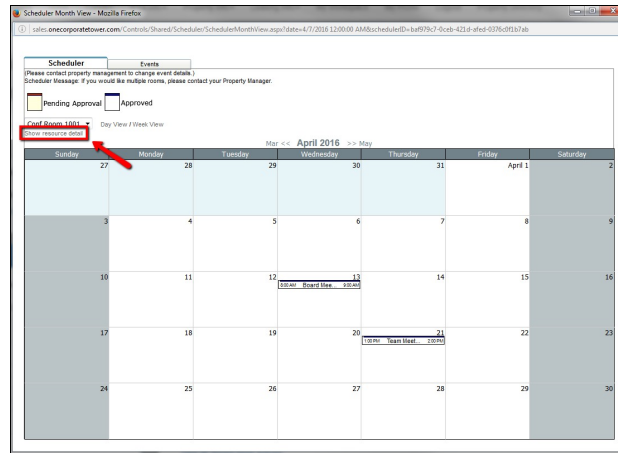
- **Resource Name:** Name of the resource.
- **Description:** Description of the resource. This will be shown to Tenants *only* when they view the scheduler from My Workspace, select the resource from the dropdown, and click on **Show Resource Detail**. This is not shown when viewing the calendar from Control Panel (for staff members).



- **Start/End Time:** Time range availability for the resource. This is restricted to the default start/end time of the scheduler.
- **Available:** Allows the resource to be available for users to make reservations. If, for some reason, the resource becomes unavailable (i.e. construction, etc.), then you can temporarily make it unavailable rather than deleting the resource.
- **Allow Double Booking:** Allows multiple events to be scheduled for the resource during the same time period.
- **Allow Bill to Suite:** Allows a staff member (i.e. Property Manager) to select a different suite to bill to when creating a scheduler request on behalf of a tenant user.
- **Allow Recurring Events:** Allows users to create recurring events.
- **Max Range for Reservation:** Restricts how far out a tenant user can make a

reservation request.

- **Allow Weekend:** Allows weekends to be available for booking.
- **Block Requests prior to Scheduled Events within Set Time:** Blocks out a set time *before* scheduled requests to allow for setup time. Does not allow other tenant users to schedule a request during the blocked time.
- **Block Requests post Scheduled Events within Set Time:** Blocks out a set time *after* scheduled requests to allow for take down time. Does not allow other tenant users to schedule a request during the blocked time.
- **Resource Image:** Allows staff members to upload a picture(s) of the resource. The picture(s) will be shown to Tenants *only* when they view the scheduler from My Workspace, select the resource from the dropdown, and click on **Show Resource Detail**. This is not shown when viewing the calendar from Control Panel (for staff members).



- **Resource Document:** Allows staff member to upload resource documents for the users (i.e. forms, rules, regulations, instructions, etc.). Users will be able to view these documents after clicking on a day in the resource calendar to book a reservation.

Title*: _____

Description: _____

Notes: _____

Contact Info: _____

Number of Attendees: _____

Documents:

- Catering Menu

Layout*: Presentation Style - \$100/hr

Business Hours: 8 AM - 3 PM

Start: 4/29/2016 8 AM 0

End: 4/29/2016 9 AM 0

Price: \$100.00 (fees are rounded up)

Upload Document No file selected.

Please read the following **Terms of Service**.

ACCEPTANCE OF TERMS
Welcome to the Axis building portal. Axis provides its service to you, subject to the following Terms of Service ("TOS"), which may be updated by us from time to time without notice to you. You can review the most current version of the TOS at any time by accessing this section. In addition, when using

I certify I have read and understand the Terms of Service. I understand that checking this box is functionally equivalent to providing my signature.

* required fields

9. Click on **Submit** to save the resource.

Note:

- You can create multiple resources per scheduler. Therefore, if you need to make another resource for the scheduler, then follow the steps again.
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