# Booking table – user manual

Table of content

1. What is the planning board and the CEITEC booking system

The CEITEC booking system is used to create reservations on user-selected / favourite devices and to manage an overview of the occupancy (already created reservations of other system users) of these devices. Furthermore, the system offers an overview of user-created reservations, offered trainings and current information from individual laboratories and core facilities.

The booking system is available at booking.ceitec.cz

2. Booking table display

Booking table is divided into several parts (described below):
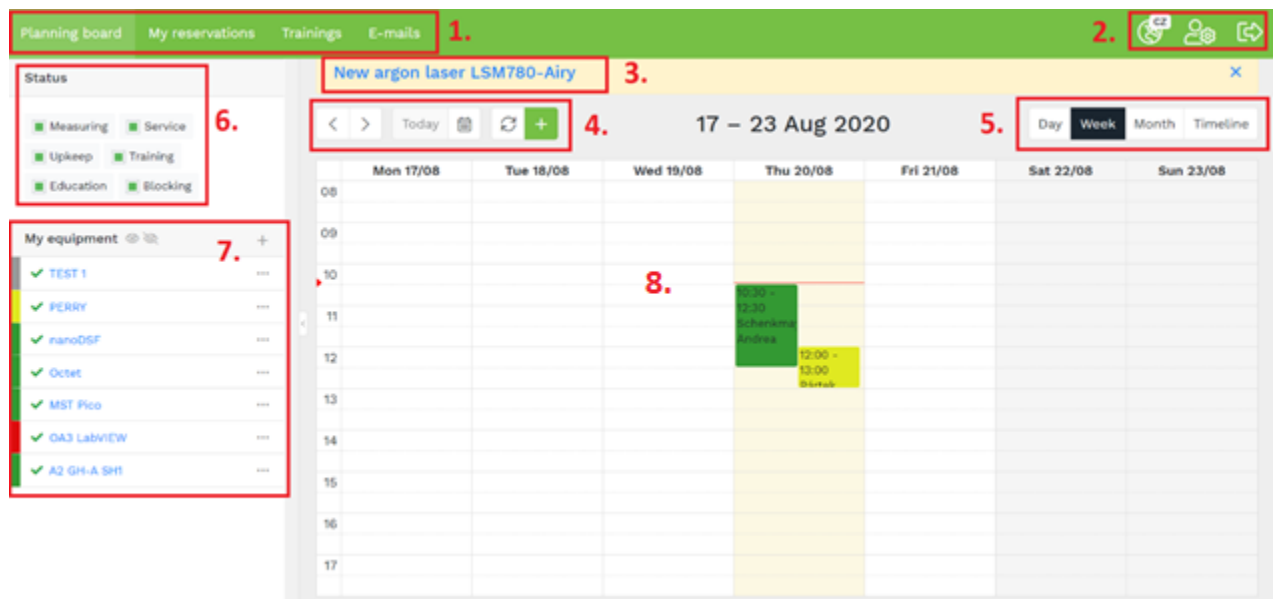
1. Main menu
2. Language version and user settings panel
3. List of current notifications
4. Panel for calendar set-up
5. Calendar view selection panel
6. Display of reservations by type in the calendar
7. List of favourite equipment
8. Calendar

2.1. Main menu

Main menu contains:

- o   a link to the home page of the planning board (Planning board),
- o   a list of all created reservations of the currently logged in user (My reservations)
- o   a list of currently offered trainings (Trainings)
- o   a list of messages sent within the reservation system concerning the currently logged in user (E-mails)

2.2. Language version and user settings panel

- o   Language version switch – Czech and English version

- o   User setting (displaying reservations, calendar range,…)


- o   Logout

2.3. Unread notifications for the currently logged in user

This is where important notifications entered by your lab administrator or system administrator appear. Click on the name to open the notification detail, click on the cross to the right in the notification row to remove the notification from the main page of the planning board. All current notifications can be found in the user settings.

2.4. Panel for calendar set-up

Buttons affecting the calendar display (4. on the top diagram):
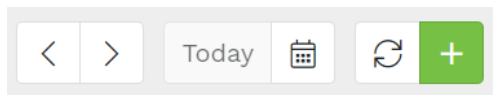
- o   Move the arrows to the next displayed period (day, week, or month)
- o   Return to the current day (Today button)
- o   Calendar button for quick selection of the displayed period
- o   Refresh data displayed in the calendar
- o   Quick creation of a new reservation (green plus)

2.5. Calendar view selection panel

In the right part above the calendar (5.) there are switches of the calendar display to Day, Week, Month, Timeline (each time you log in to the system, the default display is the one saved by the user in the user settings.
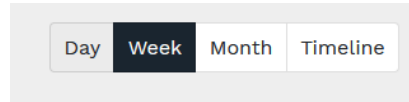
More about this distinction is in chapter 5. Calendar layout.

2.6. Display of reservations by type in the calendar

In the upper left part of the screen there is a panel for selecting reservations according to the type of reservation (6.). Each type except the basic type **Measurement** is marked in the calendar with a letter flag in the upper left corner of the reservation. The picture shows reservations with the flag Service, Education or Blocking.

There are following values to choose from (the letter indicating the type of reservation in the calendar is given in brackets):

- o   Measurement - standard reservations for scientific purposes
- o   Service - equipment repairs (S)
- o   Upkeep - minor maintenance (U)
- o   Training - reservation used for training new users (T)
- o   Education - reservations for teaching students (E)
- o   Blocking - general blocking of devices by device administrators (B)

2.7. List of favourite equipment

The list of favourite equipment (7.) is displayed on the left side of the screen. The settings of favourite equipment will be explained in Chapter 3.

2.8. Calendar

The calendar (8.) shows the reservations of the selected favourite equipment according to the time range and calendar display settings. The calendar can be set to display the Day, Week, Month and Timeline. See Chapter 5. Calendar Layout for more information.

Before using the planning board, each user must set up their favourite equipment.
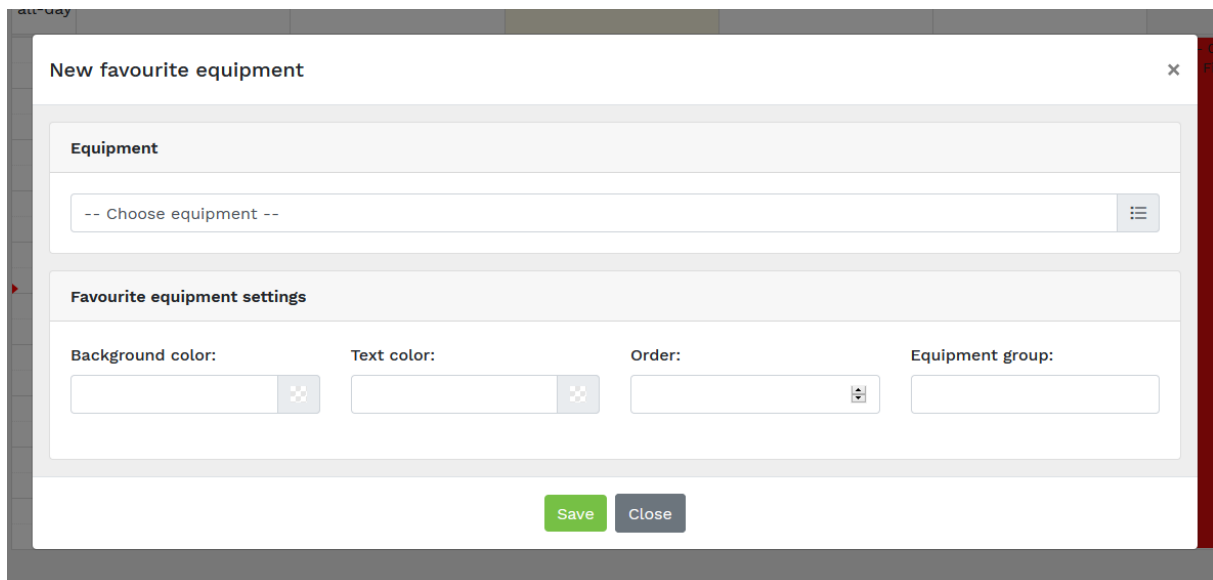
3. Favourite Equipment set up

Using the "+" option in **the My Equipment** section, each user must create a list of their favourite equipment in order to create and see reservations for these devices in the planning board.

After clicking on the option, a dialog will appear where you can set several parameters of your favourite equipment (see the picture below).
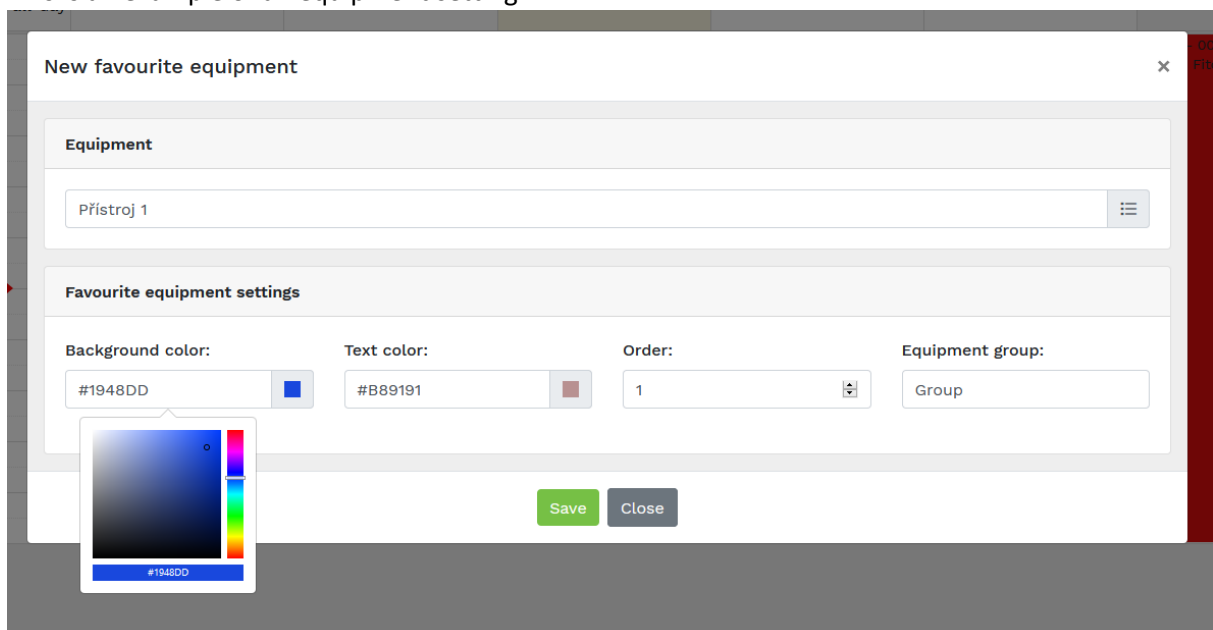
For the selected device, you can specify for each device:

- colour for better orientation on the reservations of individual devices in the planning board (Background colour),
- text colour (for better readability in case of dark or inappropriate colour of the equipment)
- equipment order in the list of favourite equipment (Order)
- group in which the equipment should be included (Equipment group)

This is an example of an equipment setting:

The picture also shows how to select a colour using the colour picker.

After setting the favourite equipment, the settings are saved with the Save button.

All favourite equipment settings are unique to each user - including colour and group settings.

There is a list of available instruments managed by CF MAFIL in *Basic Rules of Equipment Booking at CF MAFIL* document. The document is available here.

3.1. Favourite Equipment Controls
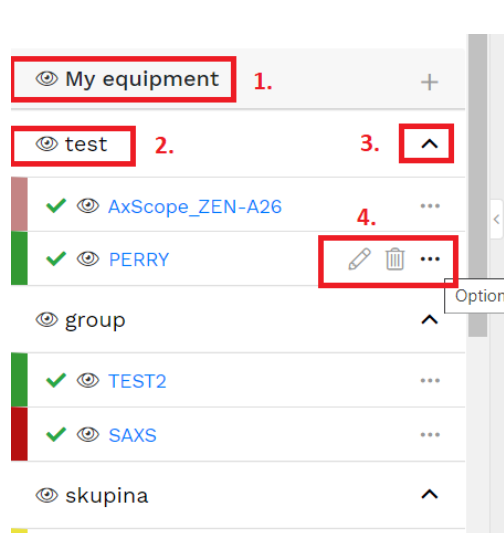
After defining / selecting devices in the list of favourite devices, use the eye icon to hide or show the reservations of all favourite devices in the calendar (1.)

o   for better orientation of the display of favourite equipment it is possible to use the creation of groups for display of devices (2.) You can collapse or expand the whole group of devices using the arrow (3.) and you will see the list of equipment.

o   Clicking on the device alias will open the device detail (more in section 3.3 Equipment detail), the colour in the left column shows the colour of this device's reservations in the calendar..

o   In front of the device name, the user-selected colour of the device, the status icon and an 👁 eye allowing to hide / show the device reservations in the calendar can be seen

o   The equipment status icon contains the following statuses:

 proper function (green),

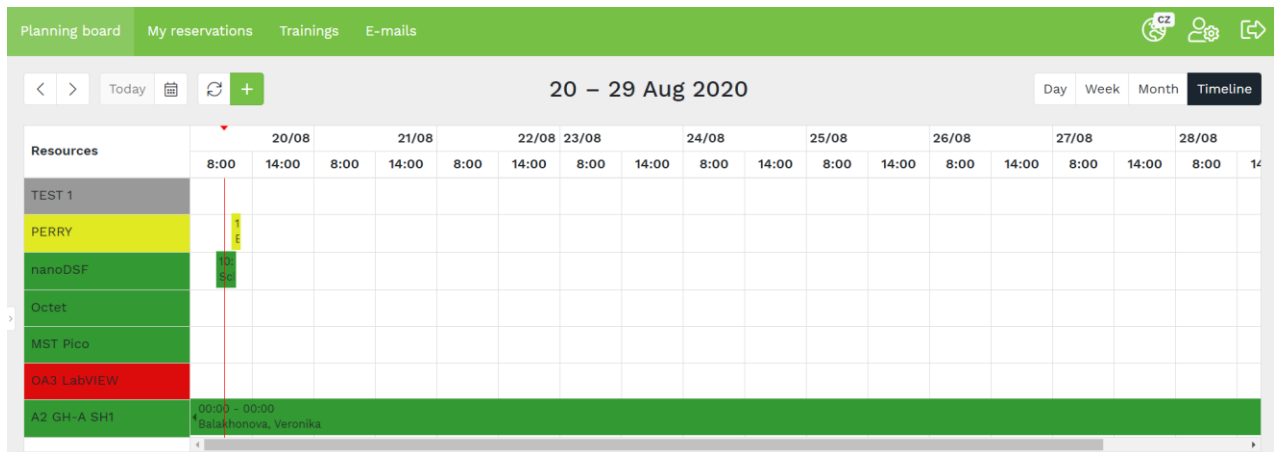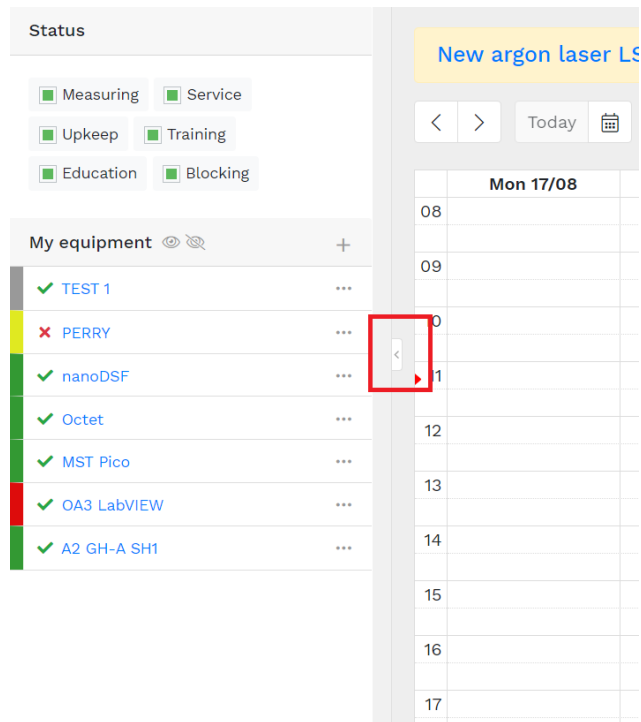 limited access (yellow exclamation mark)

 out of order (red cross)

If the device guarantor added a description of the problem, it will appear over the problem icon when you hover your mouse.

Further settings of the device can be made using three dots (…) to the right of the device name. It contains these options (number 4 in the picture above):

o   - Equipment setting (colour, order, groups)

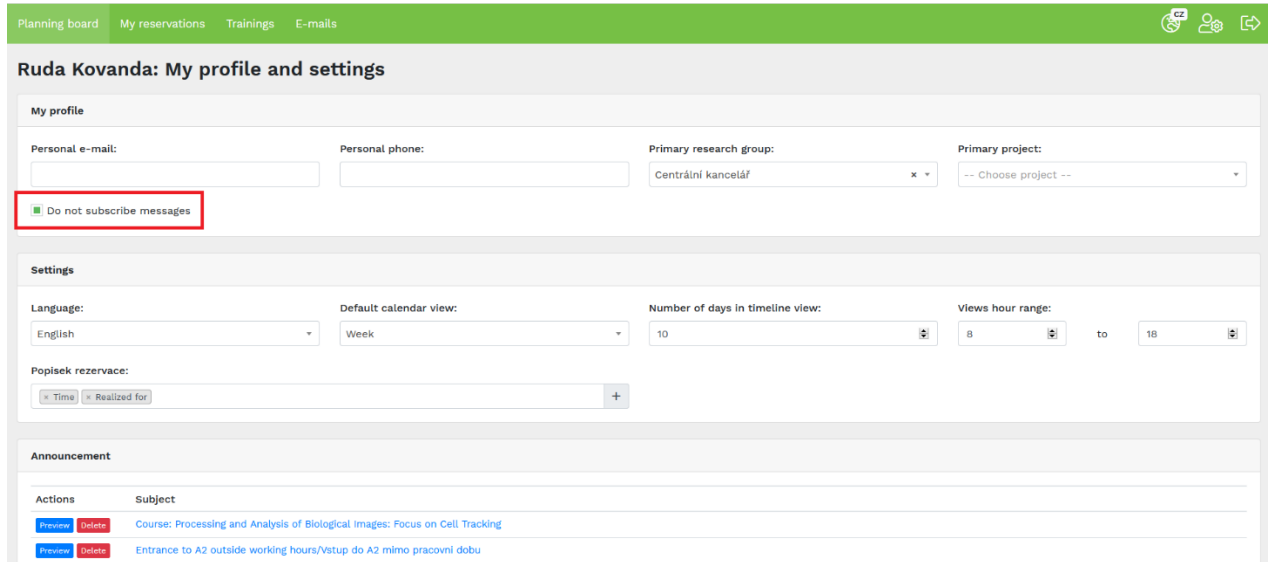o   - Remove the equipment from favourite list

3.2. Side panel hide

Use the arrow in the middle of the panel to hide the side panel with the list of favourite devices. When you hide the panel, the calendar expands across the entire width of the screen. This is especially useful when making your calendar clearer when using the Timeline view and on smaller screens (see image below).

4. User settings

By clicking on Settings   a dialog with user setting appears.

Here you can change the contact e-mail and phone number, as well as change the settings of the primary research group and the primary project.

The Do not subscribe to messages check box (marked in red in the image above) prevents the planning board from sending e-mail messages to the user.

The planning board also respects the user settings in this range:

Planning board language setting - choice between Czech and English

Default display of the planning board - selection of day, week, month, timeline

Number of days in the timeline - determines the number of days that will be displayed in the timeline view - the limit is 30 days (the longer the range is selected, the longer the reservation data is loaded)

Calendar hour range - is the range of hours within the day, which will be displayed in the daily, weekly view and also in the timeline view

Reservation label displayed for all reservations in the calendar. The user can choose from the following booking values:

- o Project (name of project used at reservation)
- o Acronym (acronym of project)
- o Realised for
- o Owner – Reservation owner
- o Time – duration of the reservation
- o Description – reservation note
- o Alias of Equipment

From these items it is possible to compile a preferred variant of displaying the reservation label in the calendar. The selected items can be sorted and moved in a row using drag & drop.

5. Calendar layout

The overview calendar of the reservation system works in 4 basic views, which the user can freely switch according to their preferences:

- o Daily view - the user sees one specific day. The equipment is arranged in individual columns
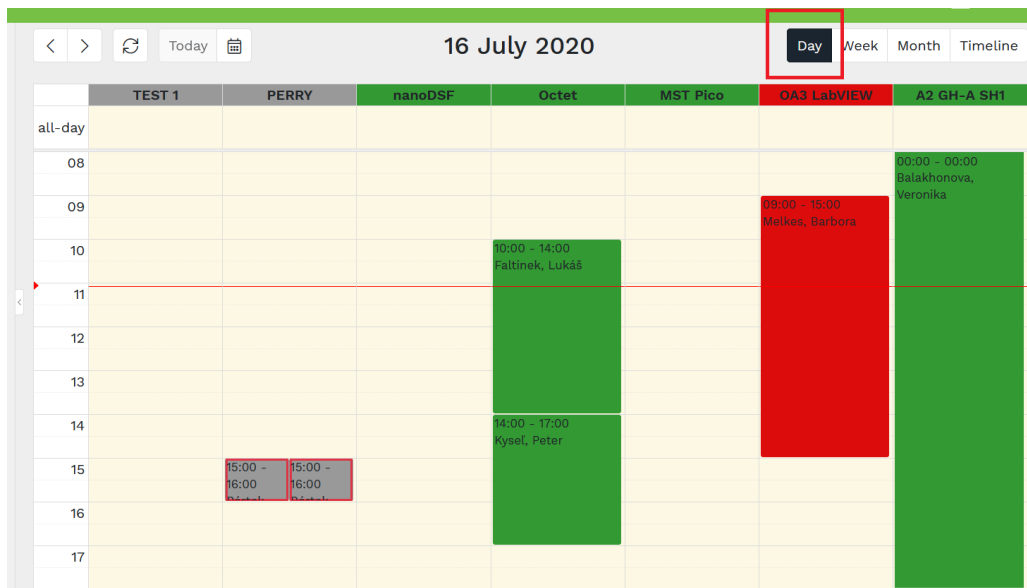
- o Weekly view - shows one week. The individual days are arranged in columns. The lines correspond to hours.
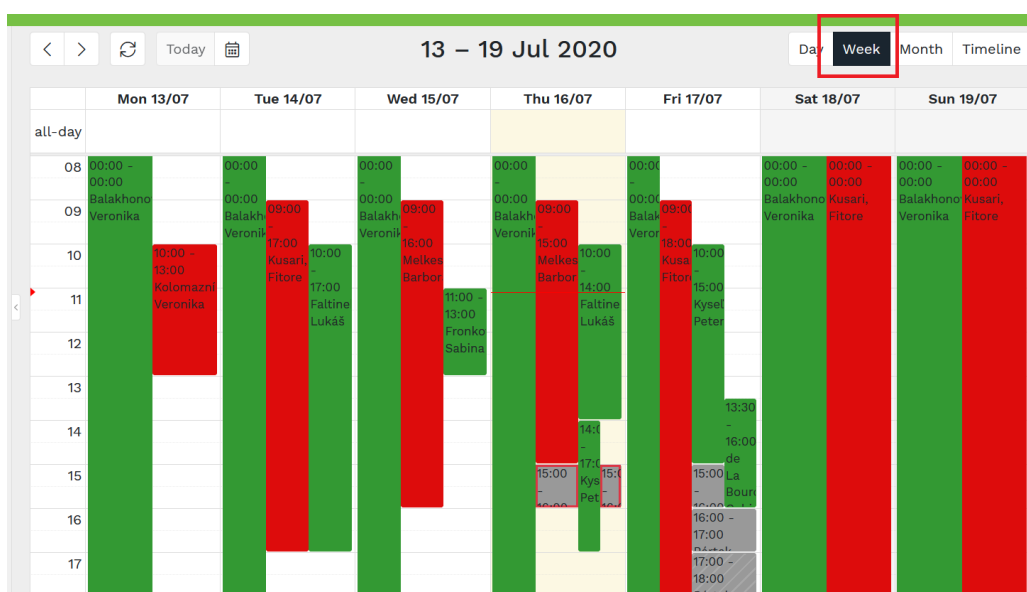
o Monthly view - each day is one table cell, columns are sorted by days of the week

o Timeline - in the rows of the table are individual devices, in the columns are individual days. The slider at the bottom of the table is used to move to other days (the timeline does not automatically align to the edge of the page - the maximum limit of the timeline is 30 days)

6. Creating and editing reservations

You can create a new reservation by clicking on the preferable time in the calendar or using the green plus above the calendar.
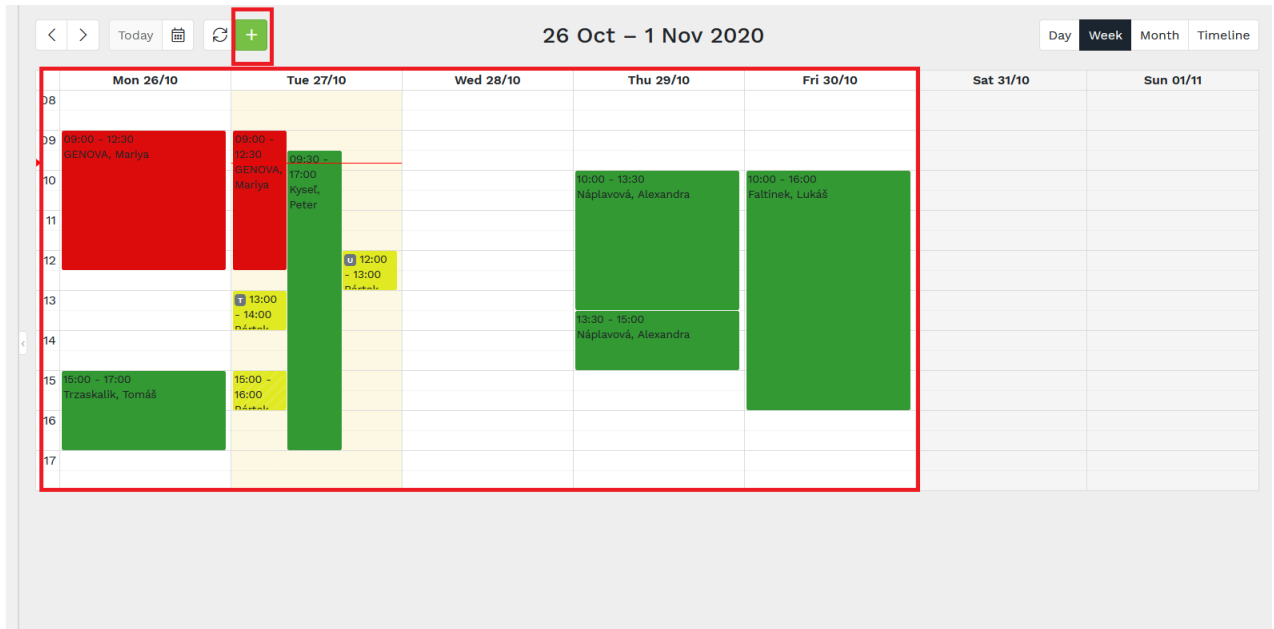
6.1. Reservation form

After clicking on a free space in the calendar, a new reservation form will be displayed. After filling it in and saving it, the system verifies whether it is possible to save this reservation (whether the device is not already reserved at the selected time, or whether the user has the necessary certifications, etc.)

The reservation form has the following fields:

- Start of reservation - the user enters the date and time
- End of reservation - the user enters the date and time
- Equipment – the user selects one or more devices, but only within one laboratory (if he wants to book eg. 2 devices, each from a different laboratory, he must create a different reservation for each). Only devices included in the favourite equipment list are offered in the this menu
- Research group – the user selects from the list of assigned research groups which research group will be selected for reservation. The research group can be assigned or changed by the laboratory administrator
- Project – Project - the project for which the reservation is created will be selected. It is used primarily to organize work and assign a source of funding to a reservation. The project can be assigned to the user by the laboratory administrator.
- Description - this is a public description of the reservation, which is available to all users
- Type of reservation - the average user chooses from the option of measuring or education. Measurement is set as the default option. Laboratory administrators can also create reservations of other types (for a detailed description, see 2.6. Display of reservations by type in the calendar).

Details   ⌃

Measuring participants:

-- Choose participants --

Service:

-- Choose service --   ▼

Material:

-- Choose material --

Price:

Total: **0 Kč**
For reservation part: **0 Kč**
For time: **0 Kč**
For material: **0 Kč**

Private description:

[Save] [Close]

The **Details** drop-down tab contains:

- Measurement participants - in this field you can add other measurement participants who will participate in the reservation
- Service - some devices also offer services that can be selected for reservation (some devices have a default service set automatically)
- Material - some devices also offer consumables for measurement
- The price is calculated according to the device settings. The lab administrator will tell you if this field is relevant to you
- Private description - if the user fills in this field, it is accessible only to the user, project team members and facility administrators after saving the reservation

6.2. Editing an existing reservation

The user can edit his reservations by double-clicking or right-clicking to bring up the context menu and select the Edit option. The reservation form will open again. We will present the context menu of the reservation in the following chapter

6.3. Context menu in calendar

When you right-click on a reservation, a context menu will appear with the following options:

- o Edit - a normal user can change the editing only until the beginning of the reservation. It is not possible to change ongoing or past reservations.
- o Delete - delete the reservation
- o Copy - copy the reservation
- o Approve - approve the reservation (relevant for device administrator only)
- o End - end the reservation (active only after the beginning of the reservation and only for devices where the device guarantor has enabled this option). The user can end the reservation at the current time or at the selected time, ie earlier than planned.
- o Write to the reservation owner - you can send a message to the reservation owner.
- o Write to device administrator - You can write a message to the device guarantor
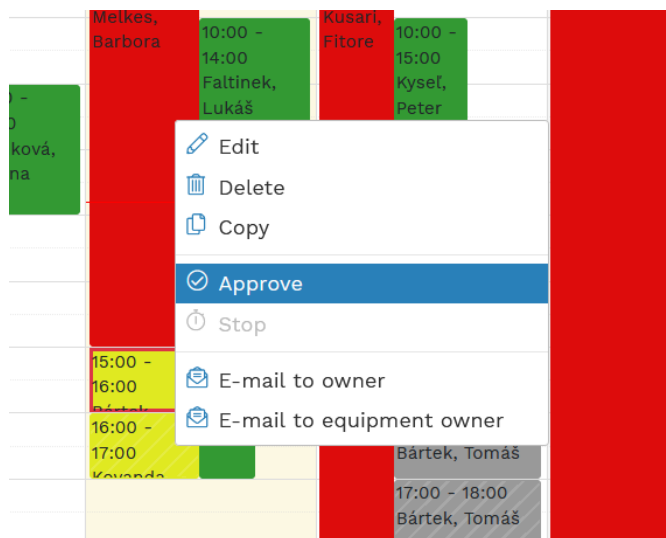
7. My reservations
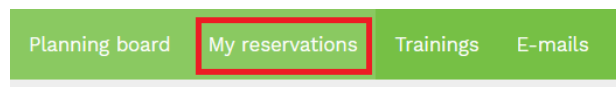
The second item in the main menu is a report of reservations of the currently logged in user - My reservations. Here the user has a list of his reservations. The list contains reservations that the user has created, but also those that have been created for him by another user, such as the equipment guarantor. The list can be filtered and exported to a spreadsheet in xlsx format (Export to Excel).

You can filter the reservation by:

- o Project
- o Reservation time
- o Reservation status
- o Reservation type (measuring, service, education,…)

8. Messages

The My Messages tab stores all messages that have been sent to the currently logged in user within the reservation system, or that he has sent within the system himself. Here is also a list of messages or notifications of cancellations. In the basic overview, these data are the date of sending the message, the sender, the recipient and the subject of the message.

It is not possible to delete messages in the planning board.

8.1. Message Detail

After clicking on the message detail (through the message name or the Preview button in the left column), the content of the message is displayed.

8.2. Create a message

After clicking the Create button, you can create a new report with standard items:

- o Recipient
- o Copy
- o Hidden copy
- o Subject
- o Message content - there is a basic formatting interface such as typing, italics or editing the html code of the message (for more complex formatting)
- o Use the Send button to send the message

After sending the message, the message will be made available to the recipient in the message list on the planning board and will also be delivered to his e-mail box.
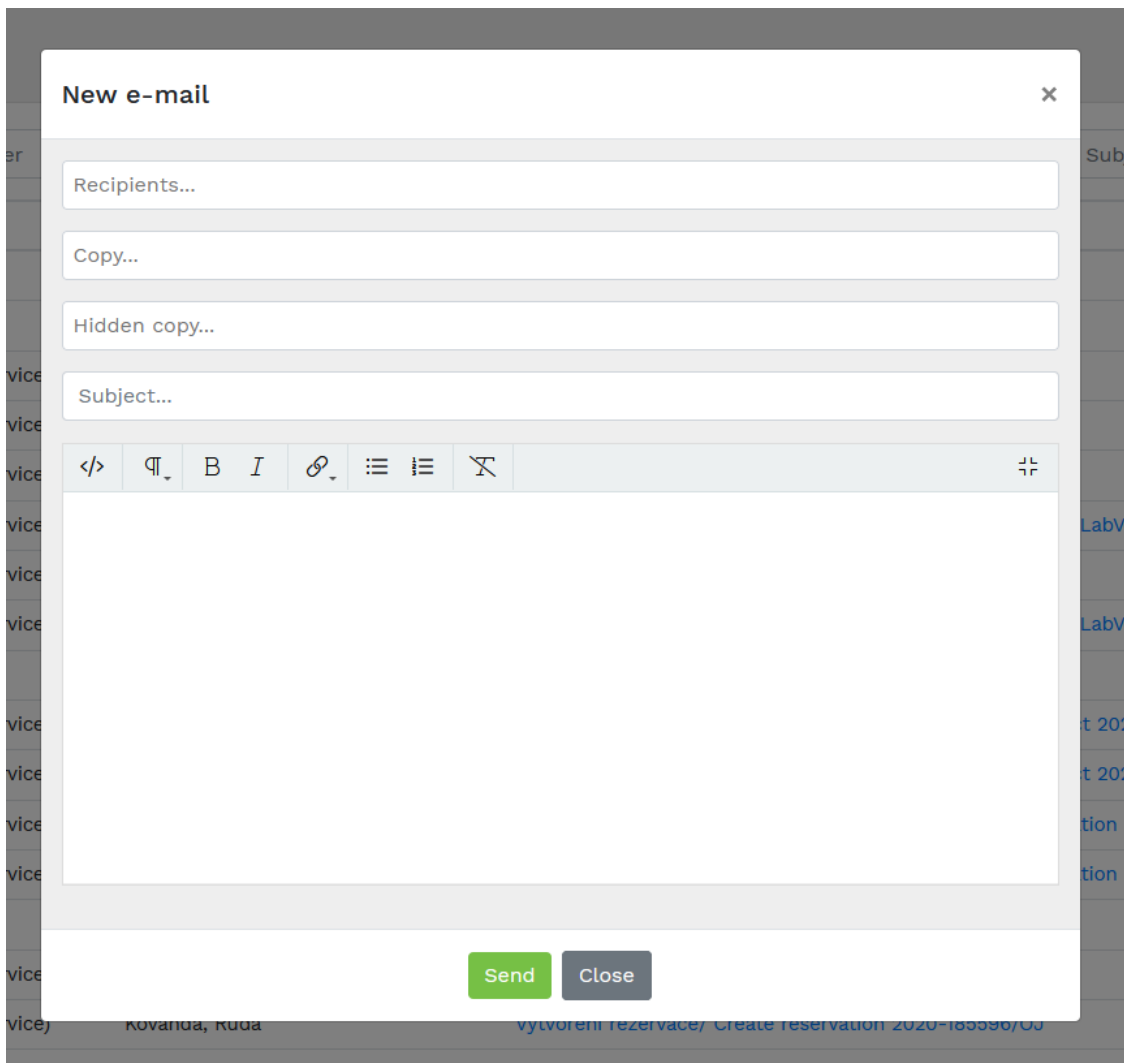
9. Logout

After finishing work in the application, we recommend that you always log out using the icon in the upper right corner of the planning board.
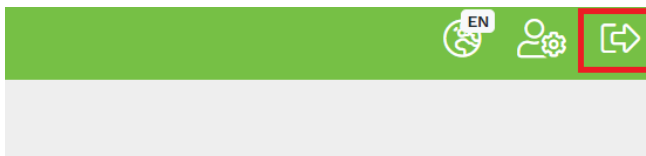
After two hours of inactivity, you will be automatically logged out. If you want to take an action on the planning board, the system notifies you and prompts you to log in again.