

Resource Scheduling

Watch the overview video to learn more about the localendar Scheduling module

<< coming soon >>

The Scheduling Upgrade allows you to manage visitor-created appointments and reservations on your calendar. When paired with our Premium Webmaster subscription, it turns your calendar into a full-featured resource scheduling platform.

Examples (click to try!)

Conference Room Scheduler

[Scheduling Sample](#)

Features

- Prevent any resource bookings from overlapping, or prevent specific types of resources/bookings from overlapping
- Allow tentative reservations that require a calendar administrator to confirm
- Control when items can be booked: Set "Availability" times for the entire calendar or specific resources
- Set fixed duration times for specific appointments/bookings
- Customize wording on your calendar and Add Event form to meet your specific needs
- Simplify the Add Event form for visitors making appointments or reservations

The Scheduling Upgrade lets you manage office hours, conference rooms, rental equipment, service appointments, and more.

The screenshot shows a web interface for configuring the Scheduling Upgrade. At the top, there's a yellow header with the word "Schedule". Below it, a text box explains the upgrade's purpose. The main area contains several sections: "Scheduling Mode" with radio buttons for "disabled", "Simple Mode" (selected), and "Full Mode"; "Availability Mode" with a checked checkbox; "Event Overlap" with radio buttons for "allowed", "Prevent any events from overlapping" (selected), and "Prevent events with the same category from overlapping"; "Event Title Naming Convention" with a dropdown menu; a "Reminder" section; and two text input fields for customizing the "Busy/Booked" message and the "Add Event" button text. A "Save Scheduling Preferences" button is at the bottom right. A footer note states "Scheduling Upgrade: Active (next renewal Jul 13, 2016)".

(click to enlarge)

Where is it?

To access the scheduling features, click the Options button from the main calendar navigation (left menu). Then, select the Scheduling tab.

Other Requirements

To make the most of the Scheduling Upgrade, you need at least a [Webmaster Premium](#) subscription. The Webmaster subscription lets visitors add events to your public calendar.

If you want visitors to be able to book or request resources by themselves, you will need this feature enabled.

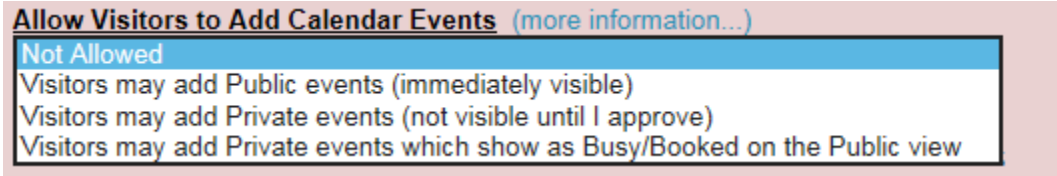
Scheduling 101, or "How do I use this thing?"

These instructions assume you have at least a [Webmaster](#) subscription, and have purchased the [Scheduling](#) upgrade

We're going to refer to user-submitted events as *Appointments* or *Bookings* in the following section. We're also going to refer to [Custom Categories](#) as *Resources* or *Individuals* sometimes. This will help make the examples clearer.

Set it up!

Once you have the Webmaster and Scheduling subscriptions, scheduling doesn't just happen. You'll need to configure what you want to schedule, when it can be scheduled. The first thing you will want to do is allow visitors to add events to your calendar. You do this on the General tab under Options:



Which option should you choose? It depends on how you want scheduling to work:

Visitors may add Public events (immediately visible)

Choose this option when you want to allow a resource to be scheduled, but you basically want to be hands-off and let things run themselves. This will let people book resources (and prevent double-bookings) and you won't have to approve anything. You will not receive a notification that a reservation was made. This is a great choice if you have public resources like a meeting rooms

Visitors may add Private events (not visible until I approve)

Choose this option when you want to specifically approve a reservation or booking. This is a good option if you run a business where you want to allow people to request an appointment that you will confirm later. Multiple requests can be sent for the same period, but you get to choose which ones you accept.

Visitors may add Private events which show as Busy/Booked on the Public view

This option is sort of a hybrid of the previous two. Visitors can automatically book a resource/appointment, but it will be shown as "Busy/Booked" on the Public calendar (you can customize this text, as we explain later). With this setting, you will receive a notification that a booking has been made. You can choose to act on the booking if you desire (such as deleting it, rescheduling it, etc)

Next, you'll want to define the resources that can be booked, and enable a Scheduling mode for your calendar. We cover this in the following sections.





Creating and Managing Resources

What it does: Defines what you are allowing to be scheduled, and (optionally) how long a booking/reservation/appointment will take

When you would use it: If you're using Scheduling, you'll use this feature, since this controls what you're managing!

Resources are managed as [Custom Categories](#) which you may already be familiar with on localendar. You can access your custom categories from the Event Editor or the Scheduling tab.

As an example, let's assume we want to schedule 3 conference rooms for a library. Here are the custom categories we created:






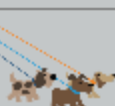
Category Name	Color	Image	Duration
Conference Room 1	 acd372		1:00
Conference Room 2	 f68e54		
Conference Room 3	 bc8cbf		

Note that we have assigned custom images and colors to each category. More about this in a moment.

Conference Room 1 has also been assigned a fixed duration of 1 hour. That means this room can only be booked in 1 hour increments.

Conference Rooms 2 and 3 have no fixed duration, so they can be booked for longer (assuming they fall within any defined Availability Period, which is explained more later)

Custom resource images and durations add a lot of usefulness to the scheduling feature. If you provide a product or service, you may need to set minimum booking times. For example, a pet-care business might set up categories like this:

Category Name	Color	Image	Duration
Dog walking with June	 a286bd		0:30
Dog walking with Mike	 acd372		1:00
Dog walking with Sarah	 fdc68c		2:00

As you can see, different staff provide the same products for different lengths of time. You could also use employee pictures to let people know who they are booking an appointment with.

Simple Scheduling Mode

What it does: Simple scheduling mode allows visitors to add 1-time appointment requests to the calendar.

Scheduling Mode

- ☐ Scheduling Mode disabled
- ☒ Enabled: Simple Mode (Visitors cannot add repeating events)
- ☐ Enabled: Full Mode

When you would use it: When you have a resource that you don't want booked on a recurring basis (say, a dog grooming service, conference room, etc). You might also select this mode to prevent visitors from "hogging" a resource.

Full Scheduling Mode

What it does: Full scheduling mode allows visitors to add repeating reservation requests to the calendar.

Scheduling Mode

- ☐ Scheduling Mode disabled
- ☐ Enabled: Simple Mode (Visitors cannot add repeating events)
- ☒ Enabled: Full Mode

When you would use it: When you have a resource that can be booked over a period of multiple days or sessions. Examples include: a vacation rental condo, a recurring request to borrow a film projector, a meeting that occupies a specific conference room every Monday

Availability Mode

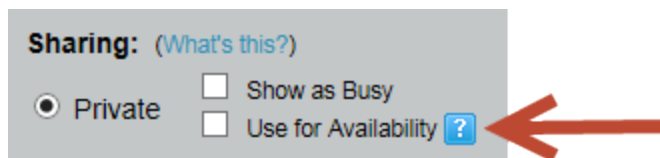
What it does: Controls when resources can be booked/reserved

Availability Mode ☒ Enabled

When enabled, you can limit users to scheduling events to specific availability times (both for the entire calendar and/or specific categories).

When you would use it: If you want to restrict events to specific times or business hours, you would use this option. For example, a library that uses Scheduling to manage conference rooms doesn't want people reserving a room at 3am when the library is closed. A salon needs to make sure appointments are only made with specific stylists when they are actually in the studio.

When you have enabled Availability Mode, a new checkbox appears in the Event Editor in the Sharing section:

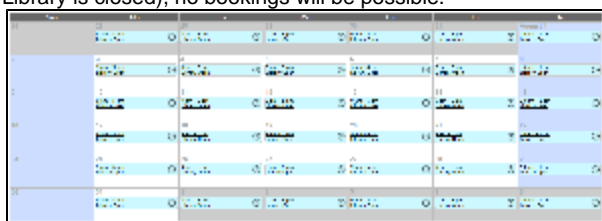


If you check this box, the event you are creating defines an "Availability Period". Availability Period events are not shown on your Public calendar view. They only appear on your Private view (when you're signed in). You can recognize an Availability Period event because it has a small clock icon to the right:



Availability Period events are normally set up as repeating events! This makes it easy to manage when resources can be booked. You can create multiple availability events for the same resources to create a sophisticated schedule.

In the example below, two repeating availability events have been added to the calendar. The first repeats Weekdays, and sets available hours for bookings to 9-5. The second repeating event sets the Saturday availability from 10-1. Since there is no Availability defined for Sunday (when the Library is closed), no bookings will be possible.

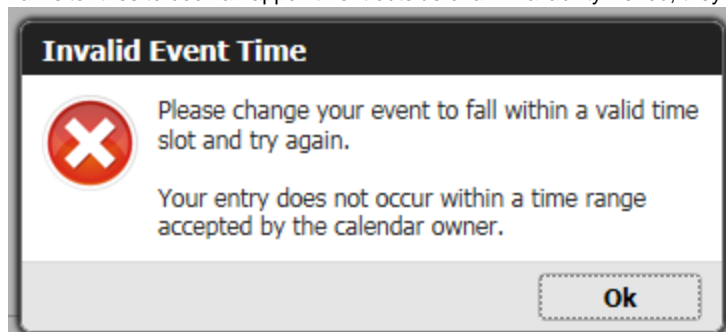


(click to enlarge)

Tip: Since visitors cannot see Availability Periods on your public calendar, you should include text on your web page (or in the Calendar Title or Footer) that indicates when resources can be booked.

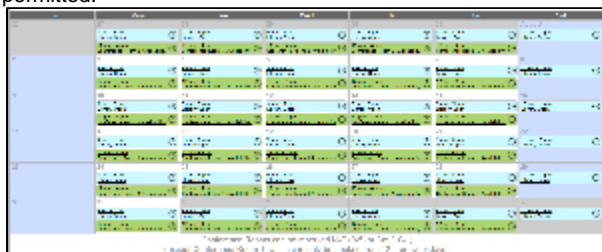
!avail2.png

If a visitor tries to book an appointment outside of an Availability Period, they will receive this error:



More about Availability

If you create an Availability Period with the category "General", then whatever resources or appointments you allow to be booked must fall in that period. If you want more fine-grained control, you can create Availability Periods for specific resource. Remember: Resources are managed as Custom Categories in localendar, so to set Availability for a specific resource, you will select that resource's Category on the Event Editor. In the following example, we have created a custom category/resource for "Conference Room 1" and assigned it a custom color and duration. An Availability Period event for weekdays from 12-4 has been added to the calendar. Even though the Library is open from 9-5 on weekdays, the Availability event for Conference Room 1 means that this resource can only be scheduled from 12-4. Booking outside this period will not be permitted.



(click to enlarge)

Important

Availability restrictions only apply to visitors. As the calendar owner, if you manually edit an submitted event, you can change its time to be outside an Availability Period. This is intended to allow situations for "special cases" (say, when a good customer needs to schedule something on a

Saturday and you say "OK, just this one time..."). As the calendar owner, you can also change the Duration of an event to be shorter/longer than its default duration (if you set one)

Managing Overlapping Events

What it does: Prevents conflicting reservations/appointments for resources.

Event Overlap

- ☐ Overlapping events are allowed
- ☒ Prevent any events from overlapping
- ☐ Prevent events with the same category from overlapping

When you would use it: If you have a resource that has fixed availability (say, a Conference Room that can only be used by 1 team at a time, or a Repairman who can only make 1 service call at a time) or if you offer multiple service but can only provide 1 at a time.

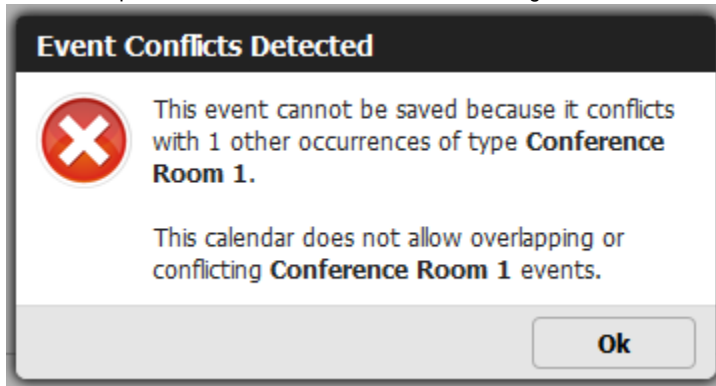
Prevent any events from overlapping

Useful if you provide multiple services (for example, a single contractor offering lawn care, gutter cleaning, house washing, etc who can only do one thing at a time) Visitors will not be able to double-book you.

Prevent events with the same category from overlapping

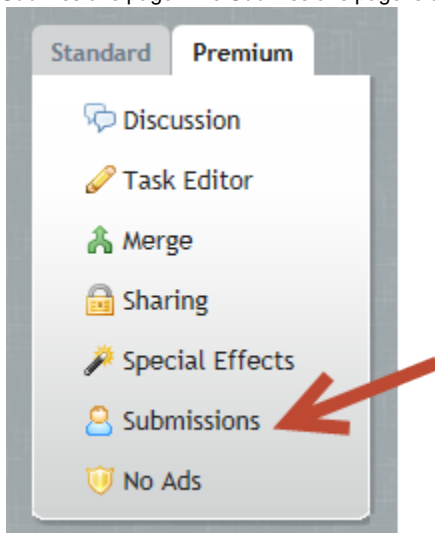
Useful if you have multiple resources, but those resources cannot be double-booked (for example, conference rooms, appointments with a hair stylist, rental equipment)

With either option enabled, a visitor will receive a message similar to this if they try and over-book a service/resource:



Managing Submitted Events

If you have selected either "Visitors may add Private events (not visible until I approve)" or "Visitors may add Private events which show as Busy/Booked on the Public view*", then any appointments/reservations submitted to your calendar will be displayed on your calendar's Submissions page. The Submissions page is available from the Premium tab on localendar's menu:



On the Submissions page, you can easily move multiple events to Public, Private, or Private (show as busy). Or you can mark events as "Processed" so that they don't appear on this page again.

Unprocessed Submitted Events

Your current setting for visitor-submitted events is: **Visitors may add Private events which immediately show as Busy/Booked on the Public view** ([change](#))

This table below lists Private events that have been recently submitted to your calendar, but not yet acted upon.

☐ Delete | [Mark as processed](#) | [Switch to Public](#) | [Switch to Private \(Hidden\)](#) | [Switch to Private \(Show as Busy\)](#)

	Start Date	Repeats? Yes (see event for details)	Visibility	Entered By	Title	Description
<input type="checkbox"/>	Aug 17, 2015 3:00 PM		Private (Show as Busy)	qateam@localendar.com	Conference Room 1, qateam@localendar.com	(none provided)
<input type="checkbox"/>	Aug 12, 2015 12:00 PM	No	Private (Show as Busy)	qateam@localendar.com	Conference Room 1, qateam@localendar.com	(none provided)
<input type="checkbox"/>	Aug 12, 2015 2:00 PM	No	Private (Show as Busy)	team@localendar.com	Conference Room 3, team@localendar.com	(none provided)
<input type="checkbox"/>	Aug 12, 2015 1:00 PM	No	Private (Show as Busy)	localendar@yahoo.com	Conference Room 2, localendar@yahoo.com	(none provided)
<input type="checkbox"/>	Aug 12, 2015 10:00 AM	No	Private (Show as Busy)	localendar@gmail.com	Conference Room 3, localendar@gmail.com	(none provided)
<input type="checkbox"/>	Aug 03, 2015 4:00 PM	No	Private (Show as Busy)	friend@localendar.com	Conference Room 1, friend@localendar.com	(none provided)

Here's an example of one way you might use the Submissions page to manage submitted events:

1. You have configured your calendar for "Visitors may add Private events (not visible until I approve)"
2. Multiple visitors request an appointment for the same resource at the same time (remember, nothing appears on your calendar because you haven't approved anything yet)
3. On the Submissions page, you see the multiple bookings and select the "winner". You move that event to Public, and delete the others. That slot is now occupied on your calendar and no one else can request it

Important

The Submissions page overrides your calendar's options for overlapping events. You can use this administrative page to accept overlapping bookings (this is a feature!) but be careful this is what you want to do.

Additional Customizations

If you have selected "Visitors may add Private events which show as Busy/Booked on the Public view", then only you will see the true Event Title when you are signed in. Visitors will see the text "Busy/Booked". You can customize this text (and the Add Event button label as well) from the Scheduling tab. To continue with our example of a room reservation system, we might choose the following settings:

"Event Title" Naming Convention

Use event category + submitter's email ☐

Reminder: On the General options tab, you can set visitor-added events to show as Busy/Booked (or your custom message), which allows you (as the calendar owner) to see the event's title, but hides it from public view ([learn more...](#))

Custom "Busy/Booked" message

Room Occupied

Custom "Add Event" button text

Reserve Room

This snapshot shows how the custom labels will appear on your calendar:



(click to enlarge)