SCSAM Scheduler
Admin Documentation

Registering a scheduler account
Users with a Case Single Sign On account

Faculty, staff, students, and affiliates of Case Western Reserve University have the option of using their CWRU Network ID to register for the scheduler. To begin click either Case Single Sing On link on the menu or the link provided in the welcome text. You will be directed to a form where you will enter some personal details. CWRU users must check the radiation training box if they have completed
the required training. If you need to set up a billing account (most students will not), simply check the billing account check box and click next. After you submit your registration SCSAM staff will evaluate your input and activate your account. You will receive an email when the process is complete.

Other users

Any user without a CWRU Network ID must register a user account. To get started click the link for external registration provided in the login text. You will be asked to provide your name, a username, and password on the first screen. On the second screen you enter your contact information. The final screen is for entering billing information. After you submit your registration SCSAM staff will evaluate your input and activate your account. You will receive an email when the process is complete, until this point attempting to log in will present an error.

Logging In

Before you login you will see a menu like the one picture below.

![Login Menu]

CWRU Single Sign On Users

Users signing in with their CWRU Network ID need only click the Case Single Sign On link.

Other Users

To log in with your scheduler user name and password enter them into the user and password box and press login. If you have forgotten your password you can click the Reset Password link and enter your user name in the popup. We will send you an email to verify you clicked the link and then we can send you a new password.

All users

When you log in you will find your menu has changed and will look similar to the one below. Clicking home will return you to the welcome screen. Scheduling brings you to the instrument calendar. You can view and edit your personal information in My Profile as well as view your permission level on all instruments. When you are finished please remember to click log out. You may only be signed in at one location at the same time.

![Menu]

Requesting Purchase Orders

If you need to request a purchase order you may do so after logging in by clicking the Request PO link. Simply fill in and submit this form. You will receive emails during the entire process and will be notified when your funds are made available or of any problems that occur.
Approving Purchase Orders

Account managers are the only users that can process purchase orders. When a request is approved by a business manager or primary investigator it will be available for account manager approval. After clicking the PO status link you will see a screen like the one below this paragraph. You will see a list of unapproved purchase orders. On the left is the pertinent account information. On the right you can choose to approve or deny each request, record the transaction id, and leave a comment. If you choose no actions for the request it will not be modified. When you are done press submit.
Scheduling Events

Upon clicking Scheduling on the menu you will be presented with a grid like the one above. All of the instruments you can schedule on are presented on the y-axis with a 24 hour scale on the x-axis. You can move back and forth one day with the left and right grey and blue arrow buttons in the top left corner. The double arrow buttons skip back and forth on week. The today button brings you back to the current day. To begin scheduling locate your instrument on the left then click and drag in the appropriate cells in the row to fill in a bar of approximately the time you wish to schedule. You can also double click in the cell of the hour you wish to start. Either method will then open the details box seen below.
All users

This is the details windows. If you only have supervised access to an instrument you must select an engineer and you will only be able to schedule between 9am and 5pm. Users with daily access do not need to select an engineer but the time must still be between 9am and 5pm. The 24/7 permission allows you to schedule without an engineer at any time of the day. While adding an event you may choose to change the selected instrument through a drop down box. Any text entered in the new comments box will be saved to the event and is visible to all other users. The projects list available for personal tracking of project time and the entries have no effect on your appointment time. Project names and durations are arbitrary and can be of any unit. To add a new project type a name into the drop down box and press the green add button. This will add an entry to your project list as well as save your new project in the drop down. To use an existing project find it in the project drop down and click the green plus button. To remove a project from the list click it and then click the red minus button.
When finished press submit and your request will be validated. When successful you will see your name on a blue bar occupying the correct time and instrument on the calendar like below.

**External Users**

The account to be billed can be selected from a drop down box. If you have billing accounts you select one and are billed later.

**Internal Users**

Purchase Order accounts must have enough funding for the appointment requested. Each account has its available balance listed next to it in the drop down.

**Admins**

Administrators can change the user that they are scheduling as. This will facilitate call ins, email requests, and any other manual scheduling tasks that might arise. Internal comments can only be seen by scsam staff. They are hidden be default. To make them visible click the internal comments header. Clicking it again will make them hidden again. When selecting another user the account and projects info is changed to the appropriate accounts. Administrators may purposefully run PO accounts into negative balances.

Administrative users can add sample preps to events. To record work such as preparing samples you will need to add them to the sample prep list. All available jobs are listed in the drop down. Once selected you can press the green plus button to add the sample prep to the list. Once in the list you can specify how many 1-hour units were spent on the job as well as what technician performed the work.

**Admin Sample Preps**

There is a button on the top of the scheduler to add event independent sample preps. Clicking it brings up a truncated details form. Currently you can only add sample preps for the current month. Fill out the form and submit it. Clicking view sample preps lets you view all independent sample preps and edit/delete them.
Editing Events

Editing events is very similar to adding them. You get started by double clicking an existing event on the calendar. You will see the details window again, shown below. When editing events you cannot change the instrument selected previously, if you need to change instruments please delete the event and resubmit with the correct information. If you need to reschedule your appointment simply edit the event before the event begins. Changes to the time after the beginning of the event are recorded as corrections. You can submit a correction if your time goes over or is cut short.

Deleting events

To delete an event open its details by double clicking it and then press the delete button near the submit button. You will be asked to verify your decision before any action is taken.
Admins

As an administrator you can choose to edit either scheduled or reported time. Scheduled and reported begin with the same value. If as an administrator you need to reschedule an appointment to a different time on the same instrument you want to edit the scheduled, or clue colored, event. The reported time will be updated to match its new time slot. If the end-users time on the machine goes under or over the scheduled time you will want to edit the reported, or red colored, time.

My Profile

The My Profile page allows you to view and edit parts of your profile. You can edit your email, phone number, or address by pressing the appropriate button under your details on the left. On the right you will see a table that shows your permission on each instrument. See below.
Activating/Editing User Accounts

After clicking the administration link on the menu you will see the following page.

Find the user you would like to activate or edit from the users drop down. Once selected the users details will appear on the page. If the user has a pending billing account the page will have an extra section shown below. The user’s submitted information will be presented on the left. On the right side is a drop down with all existing accounts. You can search this list to avoid duplicating existing accounts. If you find the submitted account already exists select it from the list and click the use existing link. If the account is indeed new you can click the use submitted link and the new account will be added to the database. Below this box you will find the user’s permission grid as well as check boxes for activation and radiation training. All changes made on this page happen in real time and there is no need for a submit button. When you click the enabled check box the user will be allowed to log in.
However, the user will not be able to schedule until they are given permissions on a machine. Here is a list of the permissions as well as their restrictions.

- None – no access
- Supervised – user must select an engineer for the instrument, the scheduled time must be between 9-5
- Daily – the scheduled time must be between 9-5
- 24/7 – no restrictions on time or engineer
- On Hold – Users level on the instrument is preserved, but the user is not allowed to schedule on the selected machine.