Calpendo Booking System
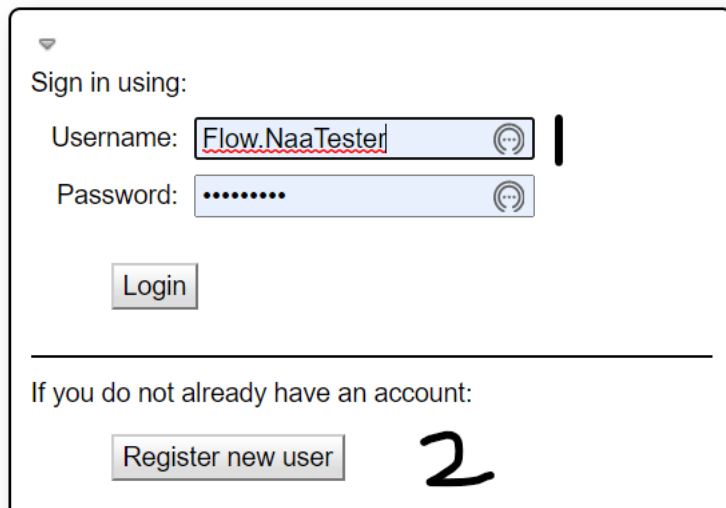
Booking a resource and submitting the service request form

Logging in

- Open the link provided in your email https://bcch-cts.calpendo.com/
- To activate your account, log in using the information provided to you in the email "Activate your profile email".
- If you are an existing user of BCCHR core facilities, your username has already been created and you simply need to enter the username and password provided (see #1 in image below).
- Once you have successfully logged in, you can change your password (on your user interface, see figure below)
- If you are a new user, select "Register new user" (see number 2 in image below) and you will be guided to create your profile. If you cannot find your lab group name, please select "Unknown" and you will be contacted by Core Tech Office to create your profile. PLEASE CHECK WITH BCCHR Core Tech and Services if you don't have your login info before registering as a new user.
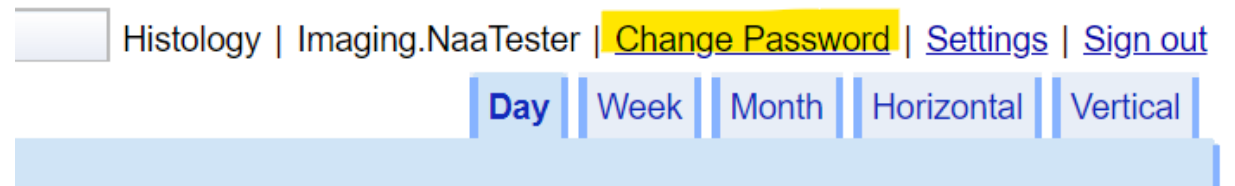
Booking calendars

- You can book a resource either by

- (1) selecting the Calendars menu, and finding the respective facility calendar, or

- (2) or select the Facility menu.

- On the Facility Page, you will be also be able to find the same information as currently provided on our Research Hub Page.

How to book a resource
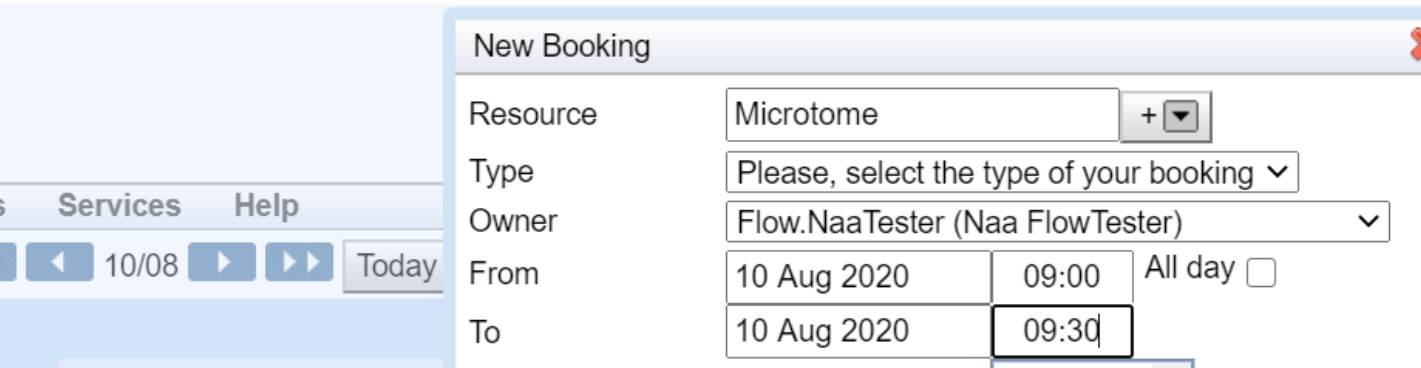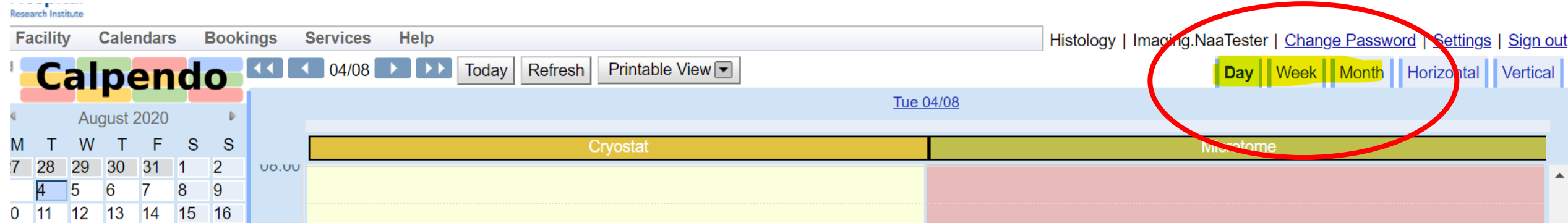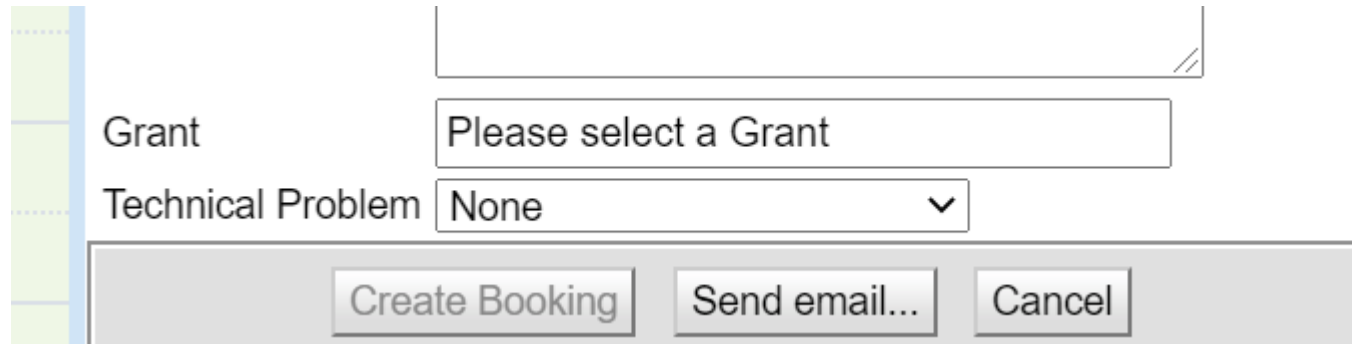
- You can toggle between Day/Week/Month for the desired view. Click anywhere on the calendar for a specific resource (e.g. Microtome or Cryostat) and booking form will open up.

- **Type**: select the type of booking (Self-serve, Training or Assistance): note, you can only choose Self-serve if you have been trained to use that resource.

- **Owner**: You can make booking for yourself or someone else within your lab/group. You will be able to choose another member from the drop down menu in "Owner" field.

- Time: There is a minimum 30 minute booking slot, less than 30min will be automatically denied.

Booking Fields

From	10 Aug 2020	09:00	All day ☐
To	10 Aug 2020	09:30	

Reminder

☑ Send reminder email

Notice Period [30 minutes]

┌─ Send reminders to ─────────────┐
│ ☑ Booker   │
│ ☐ Booking owner   │
└─────────────────────────────────┘

Status [Best possible ⌄]

Notes

Grant [Please select a Grant]

- **Reminder**: You can send reminders to yourself (Booker) or the person for whom you are making the booking (Booking Owner) and select the preferred notice period.

- **Status**: This can be left as the default setting of "Best possible". If you have chosen Training/Assisted booking, it will be automatically adjusted to "Requested" and be approved by the respective Facility Manager based on their availability.

- **Notes**: You can enter other preferred time or other notes to staff's attention to assist with your project.

- **Grant**: If your lab has only one Speedchart/Grant, it will automatically be populated. However, if you have multiple Speedcharts/Grants for your lab to choose from, please select carefully the correct Speedchart. This will ensure the usage charge is assigned to the respective grant. Some labs prefer specific Speedcharts for specific lab members based on their projects. If you fail to choose the correct Speedchart, usage will be charged to whichever Speedchart is selected by default. If there is no valid Speedchart/JV found against your profile, system will generate Temporary grant ID for you to make a booking, and will send an email to your lab contact/PI to submit a valid standing order to continue for future bookings.

Reporting Technical Problems:

Technical Problem: This is set to "none" as a default. If you experience an issue on the equipment you booked while using the equipment that doesn't allow you to successfully use the instrument, you can edit your booking and report the technical problem to notify the facility manager to assist.

Service Submission Form

- You can find the Service Submission Form under two different menu:

Facility or Services

- Under the **Services** Menu, you can find the "Order" button that will take you to the Service submission form

- Under the **Facility** Menu, you can select Histology and click "Book a Histology Service" to reach to the Service Submission Form.

Service Submission Form:

Status: Will remain in the default setting of "Requested" until the Histology Staff member reviews and confirms the request.

Owner: The Owner is the individual who the booking is being made for. Others can submit the form on behalf of another person in their lab, so ensure that who ever you have selected as the Owner is the individual who wants and will be using the booking as they will be charged for the booking and receive all notifications regarding the status of the project.

Requester/Requester Email: If different from Owner, please fill in your name and email address for contact if needed.

Processing Type: Please select the processing type you will need, This is a <u>mandatory</u> field for price calculation and cannot be left blank.
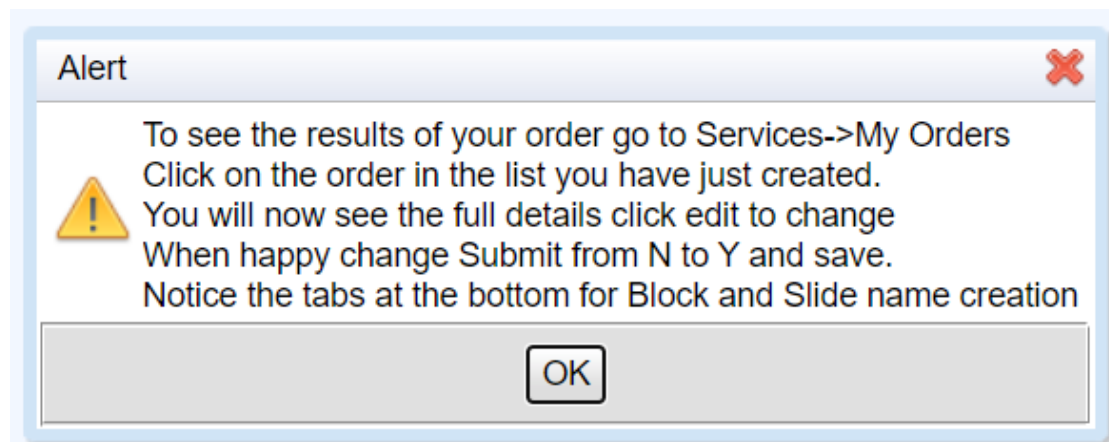
Please ensure you provide as much details possible to assist the Histology staff with appropriate instructions in the provided fields. You can then either "Save" or "Submit" your work order explained next.

| Cancel | Save | Send email... |

Service	Histology Service Order
Status	Requested
Owner	
Requester	Type value and press Enter
Requester Email	
Processing Type	Paraffin
Number Of Blocks	
Processing	No
Processing Rush	No
Slides Per Block	
Sections Per Slide	1
Slides Rush	No
# H&E per Block	
Rush H&E	No
Gel Embedded Tissue	No
Frozen Embedding in OCT	No
Type Of Rush	Please choose
Tissue Type	
Fixative	Please select a fixative
Optional Fixative	
Storage	Please select a storage type
Optional Storage	
Submit	No

Save: If you are not ready to submit your service order and expect to make more changes later, you can simply click "Save"

Submit: If you are ready to submit the service order, select "Yes" in the dropdown next to "Submit", and the service order will be submitted to the histology staff.

You will see the following pop up message when you "Save" the service order. How to locate your saved order and make changes is explained on the next slide.

Alert

To see the results of your order go to Services->My Orders
Click on the order in the list you have just created.
You will now see the full details click edit to change
When happy change Submit from N to Y and save.
Notice the tabs at the bottom for Block and Slide name creation

OK

Cancel | Save | Send email...

Service	Histology Service Order
Status	Requested
Owner	
Requester	Type value and press Enter
Requester Email	
Processing Type	Paraffin
Number Of Blocks	
Processing	No
Processing Rush	No
Slides Per Block	
Sections Per Slide	1
Slides Rush	No
# H&E per Block	
Rush H&E	No
Gel Embedded Tissue	No
Frozen Embedding in OCT	No
Type Of Rush	Please choose
Tissue Type	
Fixative	Please select a fixative
Optional Fixative	
Storage	Please select a storage type
Optional Storage	
Submit	No

Locating and making edits to your saved orders:

- Go to Services Menu>My Orders

- You can see the list of orders you have saved as shown

- To pull the details of order, click in the order line anywhere and you will see the order details appear below

- Click on "Edit" to make changes and either "Save" for later or "Submit" (Yes) to complete the submission of your order.

Please note: Once submitted you can no longer make any changes. If you want to come back at a later time to complete your order, you can click "Save" at the top of the form, and select 'no' in the "Submit" menu

Additional Fields:

- You can add 'Block' or 'Slide' names by clicking on respective menus.

- You can add multiple rows by selecting "Add Many" and can drag the columns down for incremental names, or add individual one at a time with "Add".

- You can copy the columns by selecting <u>Shift+</u> so that "Copy" gets enabled and dropping the copied content in to the desired row and clicking "Paste".