Calpendo Quick Start

1. URL: https://stanford-cni.calpendo.com

2. Signing in
   a. Sign in using Stanford SSO. If you have been a user of the old CNI scheduler, your account information will be imported automatically to the Calpendo scheduler. You can directly sign in using Stanford SSO.
   b. New User Registration. If you did not have an account for the old CNI scheduler, you will need to register as a new user for the Calpendo scheduler. Click on Register new user, and authenticate using Stanford SSO
   c. Fill in the user information: Name, Email address, Mobile (optional), choose your PI from the existing user list (or type and search), choose your Department, then click Register. The system will automatically send you an email notification “New user request”. Once the system Admin approves the request you will receive another email confirmation “User accepted”. Now you can go back to the CNI Calpendo site and Sign in using Stanford SSO.

3. Help
A detailed user manual is provided by Calpendo and can be accessed from the Help menu button on all screens once logged in. This will be much more information than needed by most users but is available if desired.

4. A brief Calpendo Glossary
   a. **Booking** - As it sounds, this is a time slot created on one of the CNI resources.
   b. **Booker** - This is the user that is signed into Calpendo and creates the booking.
   c. **Booking Owner** - This is the user that appears on the calendar display of the booking. It defaults to the booker, but can be a different registered user. This can be useful if your lab has one person do all the scheduling, but has different people actually running the scanner. The scheduling user can assign the Booking Owner to whomever desired.
   d. **Project** - This corresponds to a grant and has an associated Owner and Principal Investigator.
   e. **Project Owner** - This is the user that will receive the monthly invoice for the project.
   f. **Principal Investigator** - As it sounds, this is the Principal Investigator on the project/grant. The Project Owner may be different or the same user as the Principal Investigator.
   g. **Booking Status** - This may be **Approved** (the default for a new booking), **Cancelled** (for bookings the user has cancelled), and then several statuses we are currently not allowing: **Requested**, **Tentative**, and **Denied**.

5. Viewing the calendar
   a. **The landing page** after logging in is the CNI scheduler front page. You can click on the **Calendar** in the top navigation bar to go to the calendar view.

   ![CNI Scheduler](image)

   b. **The default calendar view** is the weekly schedule of all the resources at CNI, including the scanner “CNI 3T UHP”, mock scanner, conference room, testing room, CNI lobby, and Room A15. Each one is a column in the daily schedule. You can select the resources to display by clicking on the items in the **Resources** list on the left.
c. Displaying only the scanner schedule by selecting “CNI 3T UHP” in the Resources list.

d. Selecting the type of bookings to display by Status and using Filter. By default, the calendar shows bookings that are Requested, Approved, and Tentative (we are not using the Requested or Tentative options) made by all users for all projects. You can choose to display the bookings selectively. In this example, the calendar is set to display all bookings including the
Cancelled ones. The green slots are reserved slots, and the gray striped slots are the cancelled slots. In addition, you may also select to display only bookings made by certain users or for certain projects.

e. **Configuring the calendar view.** In **Settings**, you can modify settings for the calendar’s Appearance, Booking Reminders (email reminder to the recipients that you choose), Calendar View (e.g. calendar view type, default project for booking, background color, day starting/ending hour, etc), Email (email address for receiving automatic emails) etc.

6. **Managing Projects**

a. **View current projects.** Users need to have active projects in order to make bookings in the calendar. You can see your current projects in **Projects - My Projects**. If you had an account for the old CNI scheduler, your projects are automatically imported to Calpendo.
Project Owners and Project Principal Investigators have the permission to update the Users associated with their projects. Simply click on the project row and a detailed list will appear including the list of associated Users for the project. They can then add/remove users as desired. They can also edit the project description, modify the Project Owner, and add additional Invoice Recipients if desired (a comma separated list of email addresses).

b. Request project membership. If you are a new user or want to be added to a new project, you will need to request project membership. You can ask the Project Owner or Project Principal Investigator to add you, or you can go to the navigation bar and click on Projects - Project Membership Request, then enter the project code(s) that you want to request, and Submit request. Project codes can be found in Projects - Project Search where all active projects will
be displayed, in the column Project Code.

The system admin will need to approve your request. After your account is associated with an active project, it will show up in your project list.

7. Booking time in the calendar
   a. **New booking.** If you have an active project, you can book time in the calendar. In the Calendar view, click on the time slot you want to book, and enter the information in the pop-up window. Slots in green are available for booking, whereas slots in pink are unavailable (see Short/Mid/Long Term Booking for more details).

   ![New Booking Screenshot](image)

   b. By default the Resource will be the same as your current calendar view. You can also select a different resource by clicking on the text box (such as the Mock Scanner), then your booking will automatically appear on the other resource’s calendar view. By default the Owner will be yourself; you can change it to another user if you are making the booking for someone else. Select Project from the list of available projects. Select Type of booking to be human scan or phantom scan if booking for the scanner. Select when or who to receive reminder emails. Select whether this booking is for Protocol Development (we no longer have a Protocol Development grant – Protocol Development time is tracked and limited on a per-project basis), or whether EEG equipment is required.

   Note: If your booking is Protocol Development and the duration you select exceeds the total PD time allocated for this project, you will receive an error message and the booking will fail.
Note: We also will no longer have a “Rooms” grant – simply use the project associated with the booking when reserving a non-scanner resource. There is no charge or limit associated with non-scanner reservations, although the mid- and long-term advance booking access restrictions are enforced.

c. View booking details. You can view details of any booking on the calendar by either hovering the mouse over the booking, or clicking on it and selecting “View” in the pop up menu.

d. Update/Cancel booking. If you are the booker or if you are a user associated with the project, then you can also edit the booking (click on the booking -> Edit). In the Edit view, you can modify the booking details and “Update Booking”. You can also click on “Cancel Booking” to cancel a booking. You can then select a reason for cancellation in the pop up window. This feature of sharing control of bookings across all users of a project is a new capability for the CNI
e. **Cancellation fee.** If the cancellation is subject to a cancellation fee, you will see a pop up warning message.

There is a one hour grace period after creating a booking, during which time the cancellation fee will be waived. In case the cancellation was due to a scanner or other equipment failure, you may select “Equipment failure” for the reason for cancelling, and the administrator will need to approve to waive the cancellation fee.

You can also see the cancellation fee details in the View Booking window. In this example the cancellation was done less than 2 weeks in advance, so the Cancellation Cost is $41.00. If another funded study booked the same time slot later on, there will also be a Cancellation Adjustment of -$41.00, therefore the Cancellation Net Cost will be 0.
f. **Short/Mid/Long Term booking.** Certain time periods in the calendar are reserved (blocked out for booking) based on the amount of time ahead. In brief,

- Tuesday 8AM-12PM and Friday 2PM-6PM are reserved for Short Term bookings and will be available 2 weeks in advance.
- Monday, Wednesday, Friday, Sunday (whole days except for Friday 2PM-6PM for Short Term reservation) are reserved for Mid Term bookings and will be available 8 weeks in advance.
- Tuesday, Thursday, Saturday (whole days except for Tuesday 8AM-12PM for Short Term reservation) are reserved for Long Term bookings and will be available 16 weeks in advance.

The time slots that are accessible subject to these restrictions will open at 9AM the appropriate number of days in advance. Please note this is different than the rolling schedule access we have previously used. For instance, the short-term booking on Tuesdays and Fridays will open 2 weeks in advance at 9am on each of those days. Similarly, the entire 24-hour period on a Wednesday will be available 8 weeks in advance at 9am.

This example shows the calendar view of the one week ahead. It's within the 2 weeks Short Term booking limit, so all the time slots are available for booking.
This example shows the calendar view of the 7th week ahead. All time slots except for the Short Term reservations are available.

This example shows the calendar view of the 8th week ahead. Time slots for Long Term booking (Tue, Thur, Sat) are available. In addition, since the current day is Friday and past 9AM, slots for Mid Term booking on Monday, Wednesday, Friday (except for the Short Term reservation) are
within the 8 weeks window, so they are also available for booking. Sunday of this week is still outside the 8 weeks window, so it’s still unavailable.

This example shows the calendar view of the 9th week ahead. Since it’s between the 8-16 weeks window, only the time slots for Long Term booking are available. (Note: This figure is for our first week of operation where we will keep the long-term booking only to 9 weeks in advance and so Saturday is showing as unavailable).
If your booking exceeds the time budget for the specific tier, you will receive a warning message and the booking will not be successful.

Failed to create scanner booking: This booking would exceed the per-project day quota limit (180 minutes) by 80 minutes

(Error code 1249#74)