

Getting Started With Calpendo

This guide will take you through the basic steps to get started with your Calpendo system. However, should you require support at any time, please contact us via email at support@exprodo.com or call +44 (0)1235 813458.

Registering as a New User

On receiving the URL to your Calpendo system, use the **Register New User** button to make a user request for yourself to get started, fill in the new user form and click the **Register** button. We will then approve you as a user with **Guest**, **User** and **Admin** roles. You will then be sent an e-mail saying your account is setup, and you will be able to login to the system and approve future new user account requests.

Enter the Resources at your Facility

Start off by creating each of the bookable *resources* required, such as equipment, people and rooms etc. To do this go to **Admin->Resource Editor** and click on **Resource** and then the **Go** button. Next, for each *resource* to be created:

- 1) Press the **Create** button that has just appeared.
- 2) Give it a name.
- 3) Leave the location as **Please select a location**. Locations can be added later.
- 4) Use one of the existing *resource types* even if they don't quite match what's needed. New *resource types* can be added later.
- 5) Choose either Project Not Required or Project Required if a *project* is required to book the *resource*. (There is a third option but it's simpler to avoid it for now.)
- 6) Leave everything else as their default values.
- 7) Press the **Save** button to save your *resource*.

Once all the required *resources* have been created, they now need to be added to the **Show All bookmark** so that the *resources* will appear in the *calendar*. Go to **Admin->Bookmark Manager** and:

- 1) Under **System Bookmarks** click the **Show All bookmark**.
- 2) Press the **Edit** button to go into edit mode.
- 3) Press the **Choose Resources** button.
- 4) Move all the resources from **Available Resources** to **Selected Resources** by selecting each one and pressing the right arrow.
- 5) When finished press **OK**.
- 6) Press the **Save** button.

Enter Your Projects

Go to **Projects->Create Project** and create a few *projects*. Information stored in a *project* may need to be changed by adding your own *properties*, but just use the defaults for now. Then for each *project* to be created:

- 1) At least give each project a Project Code, a Name and make sure to change the Status to Approved so that normal users can use them for booking.
- 2) When finished press OK. Press the Submit project request button.

Register Additional Users

Any new users should be forwarded the link to the **Calpendo Login** page, and told to use the **Register New User** button to make a user request. As an administrator, you will get an email telling you about each new user request. To approve a user, go to **Admin->User Request**. For each user to be approved:

- 1) Click on the **Login Name**.
- 2) Set **Status** to **Normal**.
- 3) Set the **Roles** to be assigned to the user.
- 4) In the **Projects** Tab at the bottom click on **Please Select a Project to add** and select the *projects* to be added to this user. (A user needs to be associated with a *project* before they can use it to make a *booking*).
- 5) Press the **Save** button.

If you want to create a new user go to **User->Search**, press the **Create** button to create a new user. Remember to allocate any *projects* to that user. It is advisable to leave the initial **Admin** and **Root** users alone as this allows **Exprodo Software** access to your **Calpendo** in the event of any problems.

To Create and Edit Bookings

To create a new booking, navigate to the desired date. Then either single-click in the calendar at the time when the booking is to start, or click-and-drag to select both the start and end times of the booking. Every booking must have a resource, so select which resource to make a booking for and then complete the rest of the fields accordingly.

To edit or cancel a booking, click on a booking to reveal a pop-up menu. This will allow you to edit the booking as well as copy it, view its history and download the booking to your Outlook calendar.

Next Steps and Helpful Information

Calpendo is now working and we would recommend watching our guidance videos that can be found on our [YouTube Channel by clicking here](#). Also, for a more detailed guide to the features and flexibility of Calpendo, please feel free to look at our [Calpendo User Guide](#).

Here are just a few of the many additional features that are available to be configured:

- **Templates** to allow you to control bookings. For instance specifying which users get automatically approved bookings at particular times.
- **Booking Rules** to allow you to manage and control bookings. For instance limiting the number of hours a user can book a resource over a period of time, or the maximum number of hours a project may book particular resources.
- **Permissions** to determine what information can be seen or edited by which user.
- **Automatic Emails** generated when changes occur, such as if a booking is cancelled to let other users know the resource has become available.

Configuration and Setup Support

If you would like support in setting up your Calpendo system, then please feel free to contact us. Also, should you wish to have an online session with one of our Customer Service Team, we can arrange for this at a time most convenient for you. All support and configuration requests can be arranged via email at support@exprodo.com or by calling us on +44 (0)1235 813458.