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### 1. Summary

The content of this PERFORM Operating Document (POD) provides guidelines for:

Showing end users (researchers) how to reserve equipment time on the PERFORM Centres online booking system for Core Facilities.

This file is a shortened version of PERFORM Operating Document **PC-POD-GA-002**.

### 2. Introduction

This document is a walkthrough of the PERFORM Centre's Core Facilities Booking website, instructing users on how to reserve a facility online.

In order to access the Core Facilities Booking (CFB) website, an account on the system will be required. Accounts are only created for people who are approved to do research at the PERFORM Centre. An account request form (PC-POD-GA-004) will be provided to the Primary Investigator during the CFET process to request accounts & access to various systems at the PERFORM Centre (including the booking system) for themselves & their research assistants if applicable.

If the P.I. does not have a copy of the account request form, it can be requested from either the PERFORM Centre's Research Coordinator or Systems Administrator.

### 3. Navigation - Facilities

Navigate to the Core Facilities Booking (CFB) website at this URL:

<https://perform.concordia.ca/CoreBooking>

On the site home page, the left panel displays a list of the department/lab areas that are in the PERFORM Centre, with each area represented as a folder.

There are also links along the top-right corner for different tools, including the home page and login page.

Clicking on a department folder will show the individual facilities that are available within that area. Clicking it again will collapse the folder.

Clicking the [+] or [-] buttons will respectively open all and close all department folders.

Browse the available facilities by clicking on their respective links in the navigation menu. Each will have a page with a description of the facility including its room number, user capacity, and general availability.



Browse the different core facilities to see details of each one.

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## 4. Navigation - Booking Calendar

Once the desired facility is selected, click the “Reserve It” link to book it. If you haven’t logged in already, you will be prompted to do so now. Viewing the booked schedule is not possible without logging in first.

If you haven’t done so already, login with your email address and password. If this is the first time using the system, use the default password provided to you by the PERFORM Centre. The site will automatically prompt you to change your password.

If the password is forgotten, contact the Research Coordinator or System Administrator to reset it to a new one. You will be asked to change it on your next login.

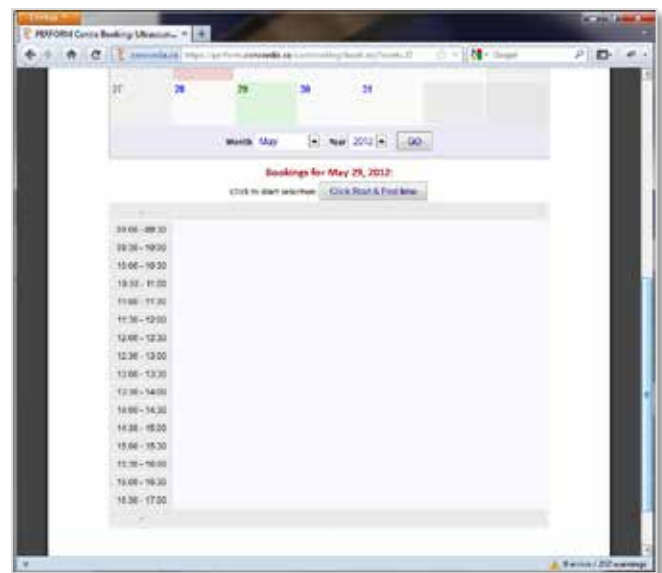


The login screen

In the Calendar view, you will see some of the facility description repeated at the top of the page, and then a calendar (defaulting to the current date), and the schedule for the selected day.



The default “medium” calendar view.

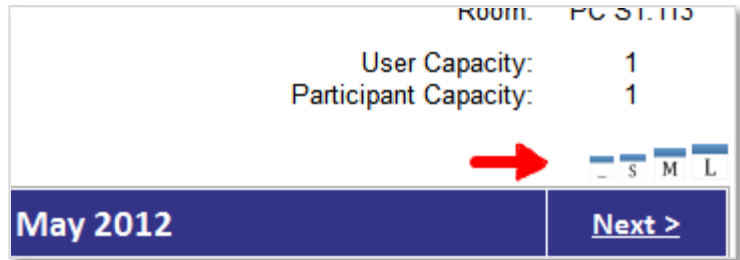


Scroll down to the schedule for the day.

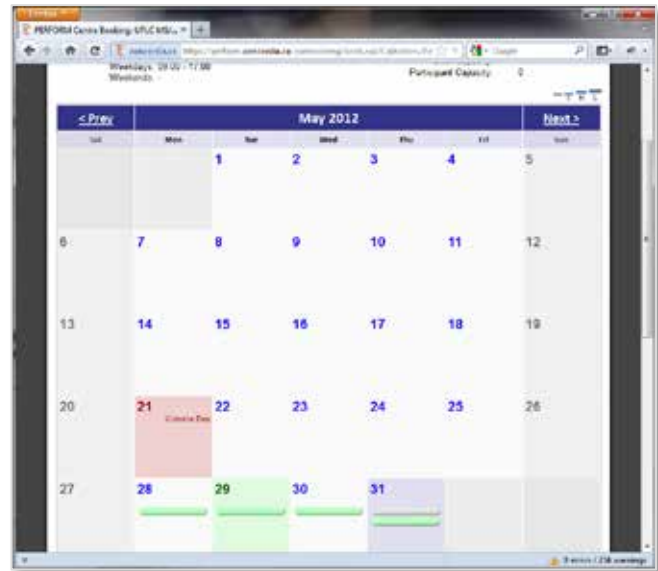
The calendar will indicate by colour which is the selected date for a booking (green), today’s date (blue - unless if ‘today’ is the selected date, then it’s green), and holidays where the university is closed (red). Holidays cannot be booked.

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Note that there are alternate views available for the calendar. Along the top-right of the calendar are a set of links to set the calendar to minimized, small, medium, and large. The default view shown above is “medium”.



a)



b)



c)

- a) The “small” calendar view.
- b) The “large” view. This view will also indicate which days have bookings on them for the current facility (see 28<sup>th</sup> - 31<sup>st</sup>).
- c) Minimized from the “medium” view.

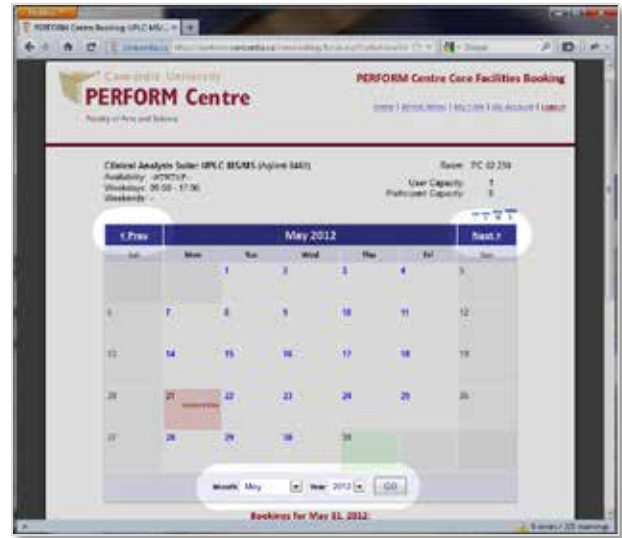
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Click on a date in the calendar to view bookings for the facility on that day, and to place your own reservation.

At the top of the calendar are "Prev" and "Next" links. Click those to navigate to the previous or next month.

At the bottom, there are drop-downs for the month and year, select from there and click "Go" to jump directly to the selected month.

The selected date is also written in red above the hourly schedule section for the day.



The hourly schedule will only display times that the selected facility is available for (ie. If an instrument can only be booked from 9am-5pm, then those are the only hours shown).

The day's schedule is divided into half-hour segments. Reservations cannot be made at other intervals (ie. 9:15 – 10:45 is not possible, you would book from 9:00 – 10:30, or 9:30 – 11:00, etc).

## 5. Enter a Booking Request

Once you have identified a date & timeslot you would like to book for the instrument...

1. Single-click on the button labeled "Choose Timeslot"
2. Your mouse pointer will change from the default arrow to a plus sign [+]
3. Click & hold on the time-slot in which you want your reservation to begin (inclusive)
4. Drag your mouse to the time-slot you want the reservation to end at – a selection box will appear joining the beginning time & ending time

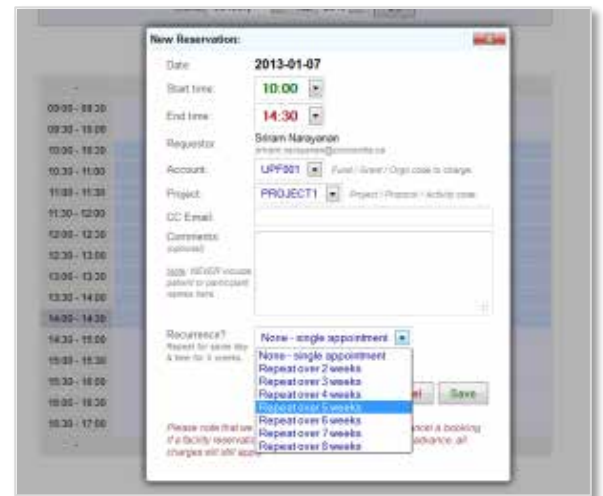
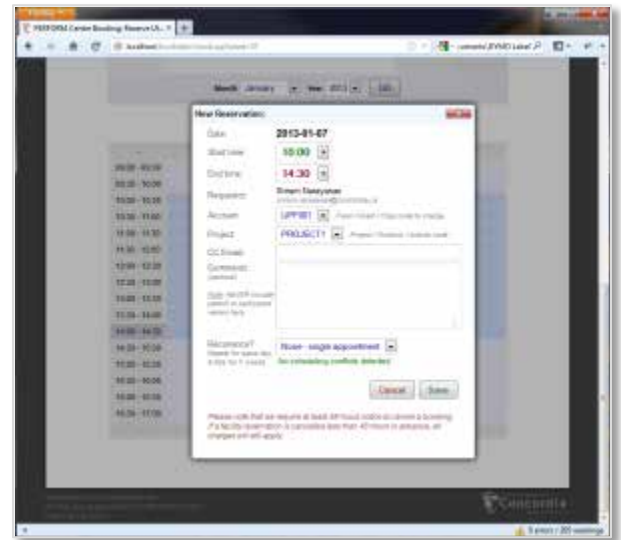


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5. Release the mouse button while over the time-slot that the reservation will end in (inclusive)
6. The New Reservation dialog will pop up with the date and time pre-filled. You will be able to adjust both from the drop-down list (schedule permitting).
7. Fill out the remaining fields in the New Reservation dialog as applicable. You can select among your pre-defined Accounts to charge to, select a Project Code, enter an email address for someone who should be copied\* on the Booking Request, and fill in any notes/comments you want to add to the request.

You can also select whether or not the reservation is a one-time-only booking, or a recurring booking that will repeat in the same day-of-week & time-slot for up to fourteen (14) weeks (ie. each Monday from 10:00-12:00 for three weeks).\*\*

- \* If you are linked to another user as your P.I., then this field will be pre-filled with *their* email address and cannot be changed. This address will be copied on email notifications of the reservation being confirmed, rejected, or cancelled.
- \*\* If you choose a recurring appointment option, the system will check to see if there are any booking conflicts (ie. one of the days in question is a holiday or the instrument is already booked for that time), the conflicting date & reason will be displayed, and you would not be able to submit the request until the option is changed so that there is no more scheduling conflict.



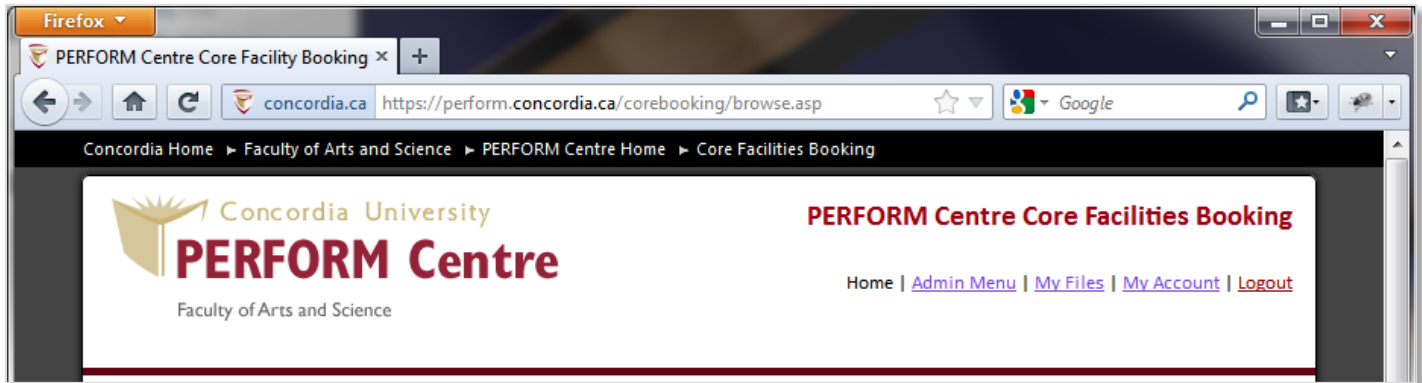
8. Click "Save" to submit the booking request. The PERFORM Center manager responsible for the instrument will be notified of the request and be asked to accept or decline it. Either way you will receive an automatic email notification of the change.

If accepted, your notification will include an [iCalendar](#) attachment (.ics file) that you can import into your personal scheduling software such as Microsoft Outlook, Apple iCal, Google Calendar, etc. to remind you of your reservation when the time comes.

If initially accepted but later cancelled, the cancellation notice will also have an iCalendar attachment that will cancel out the original appointment in your personal scheduling software.

## 6. Other Features

When you are logged in, other features will appear among the links in the header area at the top-right of the page. You may not see all of these options depending on how your account is set up.



### a) Logout

Logs you out of the system and ends your session

### b) My Account

Displays the details of your account and allows you to change some of your information, i.e. correct your name, change your email address, change your password, and update your physical address & phone number.

There is also a link to your personal iCalendar feed. Use this URL to subscribe to your PERFORM Booking Calendar in your own personal information manager (PIM), such as Microsoft Outlook, Apple iCal, Google Calendar, and others.

Once subscribed, new bookings will automatically appear in your PIM software as a subscribed calendar.

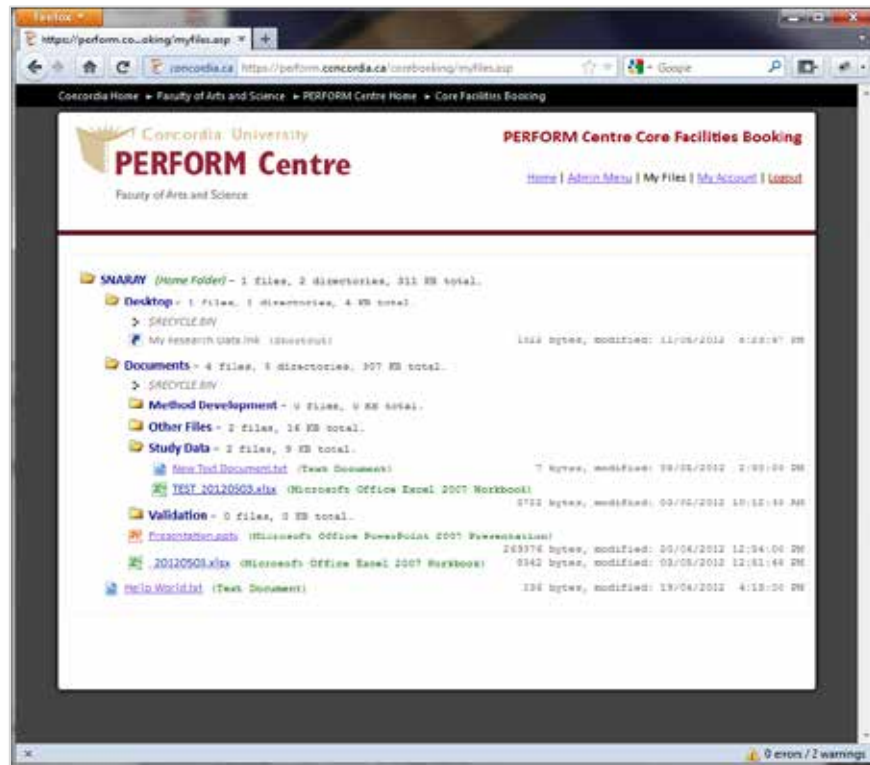
*Note in most PIM software, secondary calendars (including subscribed calendars) won't generate reminder alerts to the user for an upcoming appointment.*

Employee ID/Netname	snaray
First Name	<input type="text" value="Sriram"/> *
Last Name	<input type="text" value="Narayanan"/> *
Email	<input type="text" value="sriram.narayanan@concordia.ca"/> <small>Note: since it's your username, changing your email changes how you log in, as well where your notification emails are sent.</small>
Password	<a href="#">Change My Password</a>
Address <small>(billing address)</small>	<input type="text" value="7200 Sherbrooke St. W.,&lt;br/&gt;PC Building, Suite #PC 02.302&lt;br/&gt;Montreal, QC&lt;br/&gt;Canada&lt;br/&gt;H4B 1R2"/>
Phone 1	<input type="text" value="4086"/> *
Phone 2	<input type="text"/>
Role	Admin
PI / Research Partner	N/A
Type	Academic
Account / Fund	UPF001, UPF002, UPF003
Project / Protocol	N/A
Subscribe to iCalendar	<a href="http://perform.concordia.ca/corebooking/PERFORM_iCal.asp?cal=BFA40DE0-2365-42EF-AA66-E31BECBD0C0C">http://perform.concordia.ca/corebooking/PERFORM_iCal.asp?cal=BFA40DE0-2365-42EF-AA66-E31BECBD0C0C</a>
<input type="button" value="Cancel"/> <input type="button" value="Update"/>	

### c) My Files

Online access to the files you've saved on the PERFORM Centre servers when working on one of the Centre's instruments/computers.

Any files you've saved to your private folder on the R: drive while at the PERFORM Centre will be accessible to you online through this page. Note that if you also have other shares on our server (ie. a group share) those files will not be accessible here.



Click on folders and sub-folders to open/close them. Click on individual file links to download/open them. Some files may not be downloadable such as shortcuts or executables.

Information will also be presented that show the settings you would use to access your files by SFTP, including links to a couple of compatible programs on both Windows and Mac OSX.



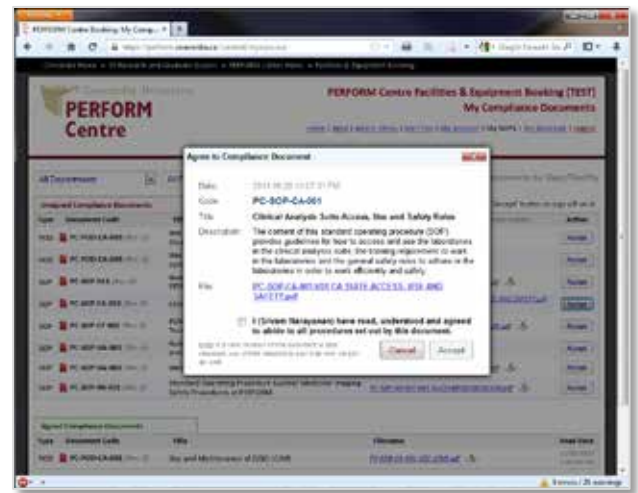
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**d) My SOPs**

A utility for you to review and sign-off on Compliance Documents (SOPs, PODs, etc) that are in effect for the different areas at PERFORM.

The available documents are presented in two lists: the 'Unsigned Compliance Documents' at the top are those that you have not signed-off on, and the bottom list contains the ones you have signed. For each applicable document, click the link to the PDF file to download/view it. Doing so will also enable the 'Accept' button.

The list of Unsigned documents can be filtered using the drop-down lists near the top of the page which lets you select by Department/Area and individual Facility/Instrument.



Click the Accept button to open the signing form where you can confirm that you have read and agreed to the procedures set out in that document & Accept it. Once you have done so, that document will then be added to the 'Signed Compliance Document' section and removed from the 'Unsigned' section.

Once signed, the PERFORM Compliance & Safety Officer and the Area Coordinator that the Compliance Document applies to will be notified automatically.

### e) My Bookings

Shows a list of all recent bookings (from the past year) that are linked to you; ie. you submitted them, or the person who did submit the request is linked to you as their P.I.

From here, there are links that will let you add the booking to your PIM Calendar, or link back to the Booking Calendar for that facility and date.

Facility coordinators can also use this list view bookings that are awaiting their approval and process them.



### f) My Activity

Allows you to view a monthly statement of your Booking activity. The report requires that you select a code that your activity is assigned to (ie. Project code, Grant code, Orgn code) - some researchers may have several - and generates a listing of all bookings linked to that code. It also allows you to filter by a specific facility.

Change the month and year from the top-right of the report to view activity from earlier periods.



### g) Admin Menu

This is a link to administrative functions for site maintenance. For PERFORM staff only. The content of this section is outside of the scope of this document.

## APPENDIX

**Core Facilities Booking website:** <https://perform.concordia.ca/CoreBooking>

**Account Request Form:** PC-POD-GA-002-v01.pdf  
(v01 at time of writing)

**Netname Activation:** <https://www.myconcordia.ca/>  
<https://fcms.concordia.ca/netname/net01.asp>