

UCD IT Services

BOOKING CENTRE:

CREATING EVENTS, BOOKING Management & General Reporting Step-By-Step



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BOOKING CENTRE - AN OVERVIEW:

Booking Centre is the UCD event management platform. It is available as follows:

UCD.ie/ Connect / InfoHub / Systems / Booking Centre

There are two primary functions which are included – 'Course & Event Setup' as well as 'Booking Management'. These are linked to event logistics and attendees respectively.

COURSE & EVENT SETUP

When events are created in Booking Centre there are four levels which are relevant. The order of these is listed below:

- i. Activity Area
- ii. Subject/ Category Area
- iii. Events
- iv. Offerings

The graphic outlines the structure:



1: Booking Centre structure

The Infohub Support team will create an Activity Area which is specific to your requirements. In most instances there will be one Activity Area created for each department, however, depending on requirements there can be more than one Activity Area created.

It is expected that you (the customer) will advise titles for each of the four areas. A list of questions will be sent to you (through a Jira) to which you will provide answers. There will also be points of note to consider for each area. These points are all noted throughout this document '**Note**'.

Note: Activity areas are set up for one of two types:

- Internal (free) UCD only events and offerings
- Ticketed events where online payments are used.

It is required that you specify whether you will be running free or ticketed events at the set-up stage. This is one of the questions that you will be asked to confirm.

'SUBJECT/CATEGORY' EXPLAINED:

Within each Activity Area there will be one (or possibly more) subject/category areas. The Subject/Category areas provide structure for all the events and offerings in the Activity Area.

Note: Images for internal free events can be added at the Subject/Category level. A default image will appear if nothing is selected. This will display in the InfoHub/My Learning and Development / People Development (Search for a Training Course) menu.

'EVENTS': WHAT AND WHY:

Within each Subject/Category there can be multiple events.

Note: Questions, Discount codes and the capacity for Multiple Bookings are applied at this level. Each of these three functions are then automatically included in each of the offerings linked to that event.

Questions must be added by the Infohub Support team and then applied by the Activity Area owner. If the questions are mandatory this should be specified when requesting the questions to be added, (see page) however the running order can be amended by the event creator.

It is possible to create multiple events within each Subject/Category area.

There are some tasks within Booking Centre which are undertaken exclusively by the Infohub team:

- Setting up the Activity Area
- ✓ Hyperlinks to the event offering from a website (Publish tags and iframes),
- Creating and editing the questions for use in offerings
- ✓ Adding Images (Nore this function is only available to UCD internal (free) events).

All other steps required to successfully create events and offerings are undertaken locally by the owners of the Activity Area.

'OFFERINGS' - WHAT AND HOW:

This is the fourth and lowest level of the Booking Centre structure. Delegates will book places on an offering. A number of fields are mandatory which gives control on when the offering is available, how many people can book a place and how much they pay (if it is a ticketed event). Questions are listed against this level and answers are captured and reported on in Booking Management – An Overview, page .

Communicating with attendees: 'How' and 'To whom':

Mail templates can be set at either Activity level (Infohub support) or Event level (Activity Area owner). There are standard mail templates available which are generic. Having a specific mail template set up for your area is possible – however it must be requested via <u>UCD IT Support</u><u>Hub</u>.

BOOKING MANAGEMENT - AN OVERVIEW

This menu option includes a series of functions and reports that are relevant to the people who are booked onto an event. This includes the Attendee Enquiry (see page) as well as the email functions.

The Manual booking function (adding/amending attendee records) is included here. All the details of all the people who are linked to the offerings (i.e. booking status, email addresses, offering ID, answers to questions, amount paid (if a ticketed event) etc.) are also available in this screen.

Several headings exist under the Courses/Number of People banner. These are dynamic and reflect the various statuses of the people who have booked onto the programme. Details follow:

- ✓ ATTEND Attended
- BOOKED Booked
- ✓ CANCELLED Cancelled
- ✓ INCART Incomplete (*Note* the attendee may not be aware that their booking is incomplete. It may be pertinent to email people at this status to update them and if necessary to complete their booking manually).
- MNLBOOK Manual Booking
- ✓ ONLBOOK Online Booking
- ✓ PROVISIONL Not confirmed
- ✓ WAITLIST Waitlisted (Nore this function is only available to UCD internal (free) events).

Clicking on the hyperlinked number under one of the headings listed under Number of People displays all the people at that status. The 'Send Email' button displays the standard Targeted Communications email function. There are a number of mandatory fields and when all the relevant details have been updated then it is possible to send a Test Email or click 'Step 3 – Preview Email & Confirm Recipients'.

Reporting on individual events and/or attendees can be generated by academic year, by activity area, by course or by course offering in this screen. For further information and more detailed reports please see Booking Centre Reports – 'Management Information' - An Overview page .

MANUAL BOOKING:

The 'value-add' of this function is to ensure that would-be attendees who have been unable to complete the booking themselves can be booked on by someone with the correct access in Booking Centre. It is also possible to create a new account in Booking Centre so that this person can then book themselves onto other Booking Centre events as required. (*Nore* if you expect that there will be a number of people who don't have UCD Connect accounts then please let EAG know when requesting the Booking Centre setup. EAG can then include a link to 'Create New Account' on the Connect login page.).

EDIT BOOKING / EDIT BOOKING DETAILS / CANCEL BOOKING:

Use this function if a delegate contacts the event organiser to amend details of the booking or to cancel it completely. The latter may be necessary when someone has incorrectly booked themselves onto an offering or cannot attend.



HOW TO CREATE A SUBJECT/CATEGORY IN BOOKING CENTRE:

CREATE A SUBJECT/CATEGORY SUMMARY

Using this function will enable you to create a Category/Subject. This will help to bring structure to the Booking Centre Activity Area such that all the events/offerings are grouped in the one category. Examples of Categories are:

HOW TO CREATE A SUBJECT/CATEGORY

1. Log into Infohub

Secure https://sisweb.ucd.ie/usis/W_HU_N	lent X 😸 Welc X 😽 Cour: X 🖶 Welc X V 🛐 Inbox X 🔯 U MENU.P_DISPLAY_MENU?p_menu=IN-HOME
torial 👹 Help Pages (MSU Sup 👹 Domain Expert	s for In 🤤 InfoHub Live 🦉 Support Monitoring D T SQL Tutorial 🦉 SISTest
UCD InfoHub My services & Information porta	1
Welcome to InfoHu	ab
You must login with an Existing Account to acc	cess this page.
Use an Existing Account	
Email, UCD ID or Connect Username	
Email, UCD ID or Connect Username Password	

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS (UCD.ie/Connect/Infohub/Systems/Booking Centre)



3. To create a CATEGORY select COURSE & EVENT SETUP:

	My se	D InfoHub vices & information portal			Students	Research	Human Resources	Finance	Campu	s Sys	tems
Hon	ne / Systems	/ Booking Centre / Course &	Event Setup								8
С	ourse	& Event Set	up								
Sele	ct Activity Are	a: Agile Training	1			- C					
Enh	ancomonto t	a this screen draw togethe	s all information w	hich related	e to Courses I	Events includi	ng foo votos, dissounts ot				
	Create New (Event Code	Course/Event	Number of Offerings	Questions	Click to	Add Ne	w Fee Rate	Fee Amount	t € Active C	lick To	
	Category					No fee r	ates round.				
	AGWBT	White Belt Training Yellow Belt Training	1	0	Webpage Webpage				Edit Query	Query C	ols SQL
						Catego	ories				_

4. Select ACTIVITY AREA from the drop-down list (shown above to the right of the arrow) if applicable.

Note: Choosing an **ACTIVITY AREA** may not be applicable as there may be only one activity area available to an event organiser.

- 5. Click the '+' on the Categories pane on the right-hand of the screen.
- 6. Click ADD New CATEGORY to display the following screen:

III Apps 🚦 Domain	Experts for	🚦 InfoHub U	ve 関 Sup	port Mon	itorin 🟮	SISTest2	InfoHubTST1	MSU Sha	repoint 🔞 Dummy Cree	Sit Card 🔘	SQL Tutorial Co	ide 😧 Nex
	UCD Home	News and Opinic	n KeyDates	tvents	UKD Directory	UCD Conne	ct Governance	ß	News 💽	Tanks 🔝	☆ ® Q	G 🔶
		UCD In My services & in	foHub formation p	ortal			Students	Research	Human Resources	Finance	Campus	Systems
	Home / Bo	ooking Centre / Co	urse & Event S	etup / A	dd New Categor	0						? 🛛 🖨
	Add Enter all th	New C	atego:	ry mit to se	ive the record.							
	Categor Categor	ry Code* ry Description										
	Activity								*			

7. Complete all the fields above

Note: The CATEGORY CODE must be unique.

Α.

Note: The Description is only visible if you have access to Booking Centre. Attendees will not see any details relating to Categories when booking a place on an Offering.

Note: You will have to manually select the correct **ACTIVITY AREA** from the drop-down list. (Please ensure that this is correct – as per your selection from point 4 above).

8. Click 'SAVE' when all fields are complete.



HOW TO CREATE AN EVENT IN BOOKING CENTRE:

CREATE AN EVENT SUMMARY

Using this function will enable you to create an Event. An Offering must then be created within an Event. Therefore the steps listed below include the steps to create an Event – the offering includes the following points:

- ✓ Dates (Event dates)
- Booking dates (From and To dates)
- ✓ Times (start and end)
- ✓ Duration
- ✓ Capacity of event
- ✓ Automated response emails to confirm booking
- **Note:** Financial details are generated from the Finance department, a Finance code must be requested in advance of setting up the event in Booking centre. For this please email

'accounts.queries@ucd.ie' for relevant details.

Note: The Payment types accepted are Visa, Mastercard and American Express.

CREATE AN EVENT: STEP-BY-STEP

1. Log into Infohub



2. Or click on the following link:

https://sisweb.ucd.ie/usis/W HU MENU.P DISPLAY MENU?p menu=IN-SYSTEMS

(UCD.ie/Connect/Infohub/Systems/Booking Centre)



3. To create the Event select COURSE & EVENT SETUP:

Home / Systems / Booking Centre / Course & Event Setup Course & Event Setup	<u>~</u> = @ A
Course & Event Setup	
come of Lioni cotap	
Select Activity Area: Agile Training	
Enhancements to this screen draw together all information which relates to Courses & Events including fee rates, discounts etc	
Click on Course/Event Code to View the course/event details. Click on Webpage to view how the webpage looks.	-
Create New Course/Event Add New Fee Rate	
Event Number of Code Questions Click to Fee Code Fee Annount € Active	lick To
Category No fee rates found.	
C AGWBT White Belt Training 1 0 Webpage Edit Overv	Query Cols SOL
G AGYBT Yellow Belt 1 0 Webpage	
Categories	-
Edit Query Cols SQL	

4. Select ACTIVITY AREA from the drop-down list (shown above to the right of the arrow) if applicable.

Note: Choosing an **Activity AREA** may not be applicable as there may be only one activity area available to an event organiser.

5. Click CREATE NEW COURSE / EVENT to show the following screen:

Note: Specific details such as individual dates and times will be created for the various offerings at the next level (see page below).

UCD Home News and Opinion Key Dates	Events Noticeboard UCD Direc	tory UCD Conner	- 🖉	News 🧕	Tasks 🧕 🕇	ን @ Q	🕼 🔅 -	<u>.</u> -
UCD InfoHub My services & information por	tal	Students	Research	Human Resources	Finance	Campus	Systems	ß
Home / Add a new Course/Event							🖹 🔒	+
Add a new Course	e/Event							
Event Code*								
Title								
Active Y/N*								
Type of Course/Event		*						
Activity Area				×				
Category/Subject Area			*					
Booking Control								
Discounts Available								
Allow Multiple Bookings		*						
Booking Email Template				¥				
Booking Email Text								

- NOTE: Select the correct ACTIVITY AREA as per the drop-down selector on point 4 above. Otherwise your Event and Offerings will not display correctly.
- NOTE: Select the correct CATEGORY/SUBJECT AREA as per page above. Otherwise your Event and Offerings will not display correctly.
 - 6. Complete the relevant fields (those with * are mandatory).

NOTE: The following is a suggested coding structure for EVENT CODE may include the following convention (1st two letters include the Activity Area, the next 3 letters reference details of the event i.e. AG = Agile, WBT = White Belt Training is visible to people booking a place.)

The **BOOKING CONTROL** details help provide structures on what the person booking the event can do and see (i.e. use a discount, make multiple bookings and also what details are included in the emails sent to confirm bookings).

Booking Control Discounts Available Allow Multiple Bookings Booking Email Template	
Discounts Available Allow Multiple Bookings Booking Email Template	
Allow Multiple Bookings Booking Email Template	-
Booking Email Template	
	Yes (one at a time)
Booking Email Text	Yes (dropdown for number)
	No
	Constitue to the local day for the face of

- Note: Yes (One At A TIME) permits one person to make multiple bookings (i.e. reserve 10 spaces without having to include names)
- Note: Yes (DROPDOWN FOR NUMBER) permits one person to make 10 bookings individually (having to list names).
 - 7. BOOKING EMAIL TEMPLATE/BOOKING EMAIL TEXT These are functions that work in tandem.

Note: Standard templates exist and new templates can be created. If you wish to have an email template created please request it via <u>UCD IT Support Hub</u>. (**BP-ACTYEML DEFAULT ACTIVITY CODE EMAIL** is standard generic confirmation booking available for use if there is no event-specific email template).

Booking Control		
Discounts Available		
Allow Multiple Bookings	•	
Booking Email Template	BP-ACTYEML - Default Activity Code Email	
Booking Email Text	bp-	
	BP-ACTYEML - Default Activity Code Email	
	BP-AECONF - Adult Ed Confirmation Email	
	BP-ALC - ALC Accommodation Booking Confirmation	10
	BP-ALC8WK - Booking Centre ALC 8 Week Presessional Programme	4000 characters left

- 8. Alternatively add in any extra details to **BOOKING EMAIL TEXT** as this will be included as part of the email template
- 9. **INFORMATION PAGE** includes general details about your event (including the event organiser and contact details).

	Specific content to be included in Booking Email	4000 charac
Information Page		
Organiser of the Event	[
Event Image	· · · · · · · · · · · · · · · · · · ·	
Highlight this Course/Event		
Contact Information		
Course/Event URL		
Contact Email		
Contact Phone Number		

- 10. HIGHLIGHT THIS COURSE/EVENT This function supports the addition of webpage details which will be visible as a link and will ensure that the event is well promoted on the website.
- 11. EVENT IMAGE DETAILS Please contact <u>UCD IT Support Hub</u> to have your image added to the Image Catalogue you will be sent the Image ID which can then be added to any event.
- 12. PUBLISH TAG / IFRAME Two links will be sent to you one of which you can send by email to individual customers (<u>https://sisweb.ucd.ie/usis/W_HU_MENU.P_PUBLISH?</u> p tag=MSU) and the other of which can be included in a website

Here are the HTML tags to use if you are putting that link into a box:

<iframe height="1000" src="https://sisweb.ucd.ie/usis/W_HU_MENU.P_PUBLISH?p_tag=*MSU*" width="720"></iframe>

Note: Please contact UCD IT Support Hub for specific links for your event)

13. **BANNER** INTEGRATION is only relevant if the offering is being tied into Continuing Professional Development (CPD) run by School of Medicine, School of Veterinary Medicine or Adult Education.

Note: Please contact UCD IT Support Hub for specific links for your event)

14. Click SAVE (bottom left of screen) when all the details are correct.



How TO AMEND AN EVENT IN BOOKING CENTRE:

Amend an Event Summary

Once created an event can be amended as often as required.

- 1. Follow steps 1-3 on page above to display the event.
- 2. Click on the icon to the left of the Event title to display the event details.
- 3. Amend the fields as required.
- 4. Click **S**AVE for instant updates.



HOW TO CREATE AN OFFERING IN BOOKING CENTRE:

CREATE AN OFFERING SUMMARY

Using this function will enable you to create an Offering. At the Offering level the following fields are updated.

- ✓ Dates (Offering dates when the Offering is scheduled to take place)
- ✓ Offering status (The four statuses here will impact on when the Offering is visible and available for booking).
- ✓ Booking dates (From and To dates when booking is open and people can book a place)
- ✓ Times (start and end)
- Duration
- Capacity of Offering (how many places are available)
- ✓ Emails to confirm booking
- ✓ Fee Rates (if applicable)

Amending any of the above functions simply involves revisiting the same pages, editing the relevant fields and then saving the changes. Updates are visible as soon as the **S**_{AVE} button is clicked.

HOW TO CREATE AN OFFERING - STEP-BY-STEP

1. Log into Infohub (UCD.ie/Connect/Infohub/Systems/Booking Centre)

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Secure https://sisweb.ucd.ie/usis/W_HU_M	ENU.P_DISPLAY_MENU?p_menu=IN-HOME
. Tutorial 👹 Help Pages (MSU Sup 👹 Domain Experts	for In 👹 InfoHub Live 👹 Support Monitoring D 🕇 SQL Tutorial 👹 SISTest2
UCD Home News and Opinion Key Dates Eve	ents Noticeboard UCD Directory UCD Connect
WCD InfoHub My services & information portal	
Welcome to InfoHu	lb
Ven much la sia with an Evidetica Association	
You must login with an Existing Account to acc	ess this page.
Use an Existing Account	
Email, UCD ID or Connect Username	
Password	
Login Forgot Password	

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W HU MENU.P DISPLAY MENU?p menu=IN-SYSTEMS





3. Select COURSE AND EVENT SETUP to display the following screen:

me	/ Booking	Centre / Course & Event Setup							8	
Co	urse	& Event Set	up							
lect	: Activity Are	ea: Agile Training	-			C C				
har	ncements (to this screen draw together	all information v	which relate	s to Courses &	vents including fee rates, discounts etc				
Clic	k on Cours	e/Event Code to view the cou	rse/event details.			Fee Rates			-	-
Clic	k on Cours k on Webp	e/Event Code to view the cou age to view how the webpage	rse/event details. looks.			Fee Rates			•	-
Clic Clic	k on Cours k on Webp reate New	ee/Event Code to view the cou age to view how the webpage Course/Event	rse/event details. looks.			Fee Rates Add New Fee Rate			•	-
	k on Cours k on Webp Treate New Event Code	e/Event Code to view the cou age to view how the webpage Course/Event	rse/event details. looks. Number of Offerings	Questions	Click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount €	Active Click	То		-
	k on Cours k on Webp Create New Event Code Category	er/Event Code to view the cou age to view how the webpage Course/Event	rse/event details. looks, Number of Offerings	Questions	Click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount € No fee rates found.	Active Click	То		-
Clic Clic	k on Cours k on Webp Treate New Event Code Category	er/Event Code to view the cou age to view how the webpage Course/Event Title Agile - Lean Champion Training	nse/event details. looks. Number of Offerings	Questions 0	Click to Webpage	Fee Rates Add New Fee Rate Fee Rate Description Fee Amount @ A No fee rates found.	Active Click	To uery Cols	• • SQ	- >L
	k on Cours k on Webp Treate New Event Code Category AGLCT AGWBT	er/Event Code to view the cou age to view how the webpage Course/Event Title Aglie - Lean Champion Training White Belt Training	rse/event details. looks. Number of Offerings 1	Questions 0 2	Click to Webpage Webpage	Fee Rates Add New Fee Rate Fee Rate Description Fee Amount @ A No fee rates found. En	Active Click	To uery Cols	5 SQ	-)L

4. Select the correct ACTIVITY AREA from the drop-down list

NOTE: You may have access to one ACTIVITY AREA so the drop-down list may only include a single option.

5. Clicking on the number of offerings hyperlink will display relevant details for that Offering

Note: If the number of Offerings is 0 you can still click that number to create a new Offering.

- 6. Click 'Create New Offering'
- 7. Complete the following fields:
 - ✓ Dates (Offering dates when the Offering is scheduled to take place)

Note: It is essential to include a Start and End date – as the Offering will not display correctly without <u>both</u> dates.

- ✓ Offering status (The four statuses here will impact on when the Offering is visible and available for booking).
- Booking dates (From and To dates when booking is open and people can book a place)
- ✓ Times (start and end)
- Duration
- Capacity of Offering (how many places are available)

Amend an Offering Summary

Once created an offering can be amended as often as required.

- 1. Follow steps 1-5 on page above to display the offering.
- 2. Click on the icon to the left of the Offering title to display the offering details.
- 3. Amend the fields as required.
- 4. Click **SAVE** for instant updates.



How TO CREATE A FEE RATE

CREATE A FEE RATE SUMMARY

Using this function will enable you to charge Fees for the Offering created as per page above. Fee rates must be created before they will appear in the drop-down list when creating an Offering. It is possible to create a Fee Rate that will only be available before/after certain dates.

HOW TO CREATE A FEE RATE - STEP-BY-STEP

1. Log into Infohub (UCD.ie/Connect/Infohub/Systems/Booking Centre)



2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS



3. Select COURSE AND EVENT SETUP to display the following screen:



4. Select the correct ACTIVITY AREA from the drop-down list

NOTE: You may have access to one ACTIVITY AREA so the drop-down list may only include a single option.

- 5. Click the '+' to the right of the Fee Rates pane.
- 6. Click Add New Fee Rate

Note: It is essential that Fee rates have a unique code. Neither the code or the description are displayed to customers and so are only visible to event organisers.

Oter Loreling	olan her allower 100	ner former	Long the lost of the log	0.00.0.0.	
UCD Int	oHub	Staters Terrorit	Cases Descrive - Fase	n Cangen Joriane	
10/w 7 (10/mg, 47% 7 10				2.6	
Add Fee Ra	c				
finite den on the encoder on the encoder of an encoder finite of the filter Notice of America Sector of America Sector of America Sector of America					
-					
		LCBL.bear door Prosont and income or conteme Children L Brook	Unchil Laika Las Pravilia 20 Provide anna Las provides anna Las provides anna	Casha Delada Gran Ng	

- 7. Complete all the relevant fields (* is a mandatory field)
- 8. The Fee Rate will be applied on each offering therefore the 'Fee Amount €' is what people will have to pay when choosing an offering.
- 9. Click the SAVE button to confirm the changes.

HOW TO LINK A FEE RATE TO AN OFFERING - STEP-BY-STEP

1. Log into Infohub (UCD.ie/Connect/Infohub/Systems/Booking Centre)

🗅 UCD 🗙 🖉 UCD 🗙 🦉 Welc: 🗙 👹 Ident	× 🗑 Welc: × 🗑 Cours × 🗑 Welc: × M Inbox × 🔟	Univ
Secure https://sisweb.ucd.ie/usis/W_HU_MEN	U.P_DISPLAY_MENU?p_menu=IN-HOME	
Tutorial 🦉 Help Pages (MSU Sup 👹 Domain Experts for	In 🦉 InfoHub Live 🦉 Support Monitoring D 👖 SQL Tutorial 🦉 SIST	est2
UCD Home News and Opinion Key Dates Events	5 Noticeboard UCD Directory UCD Connect	
Wy services & information portal		
Welcome to InfoHub		
You must login with an Existing Account to access	this page.	
Use an Existing Account		
Email, UCD ID or Connect Username		
Password		
Login Forgot Password		

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS



3. Select COURSE AND EVENT SETUP to display the following screen:



lome	/ Booking C	entre / Course & Event Setup				🗅 🖨 🗠 🗄	II 🕜 🔒	1
Co	urse	& Event Set	นท					
		a literic out	чÞ					
elect	Activity Area	a: Agile Training				G		
nhar	ncements to	o this screen draw together	all information v	which relate	s to Courses &	vents including fee rates, discounts etc		
		-						
Clic	k on Course	/Event Code to view the cou	rse/event details.			Fee Rates		-
Clic	k on Webpa	ige to view how the webpage	looks.					
C	reate New C	ourse/Event				Add New Fee Rate		
-								
	Event		Number of			Fee Code Fee Rate Description Fee Amount € Active Click T	Го	
	Code	Title	Offerings	Questions	Click to			
	Category					No fee rates found.		
G	AGLCT	Agile - Lean Champion	1	0	Webpage			
		Training				Edit Query Qu	ery Cols SQ	2L
-	AGWRT	White Belt Training	1	2	Webpage			
6	AGWDI	0						

4. Select the correct ACTIVITY AREA from the drop-down list

: You may have access to one ACTIVITY AREA so the drop-down list may only include a single option.

HOW TO AMEND A FEE RATE - STEP-BY-STEP

5. Log into Infohub (UCD.ie/Connect/Infohub/Systems/Booking Centre)



6. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS



lome	/ Booking Ce	entre / Course & Event Setup				🛛 🖨 🗠 🗮 🖉	•
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-0	uise	& Eveni Sei	up				
elect	Activity Area	a: Agile Training			2	e Ci	
nhan	ncements to	o this screen draw together	all information w	which relates	s to Courses & I	events including fee rates, discounts etc	
Clic	k on Course	/Event Code to view the cou	rse/event details.			Fee Bates	
Click Click	k on Course k on Webpa ;	First Code to view the course to view how the webpage to view how the webpage	rse/event details. looks.			Fee Rates	-
Click	k on Course k on Webpa reate New C	/Event Code to view the cou ge to view how the webpage	rse/event details. looks.			Fee Rates	-
Click Click	k on Course k on Webpa reate New C	e/Event Code to view the cou oge to view how the webpage Course/Event	rse/event details. looks.			Fee Rates Add New Fee Rate	-
Clici Clici	k on Course. k on Webpa reate New Co	/Event Code to view the cou ge to view how the webpage course/Event	rse/event details. looks.			Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount C Active Click To	-
Click Click	k on Course. k on Webpa reate New C Event Code	/Fvent Code to view the cou ge to view how the webpage course/Event	rse/event details. looks. Number of Offerings	Questions	Click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount C Active Click To No fee rates found.	-
	ik on Course. k on Webpa Treate New C Event Code Category	/Fvent Code to view the cou ige to view how the webpage iourse/Event	rse/event details. looks. Number of Offerings	Questions	Click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount € Active Click To No fee rates found.	-
	ik on Course. ik on Webpa; ireate New C Event Code Category AGLCT	//Fvent Code to View the cou ge to view how the webpage course/Event Title Agile - Lean Champion Training	rse/event details, looks. Number of Offerings	Questions 0	Click to Webpage	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount C Active Click To No fee rates found. Edit Query Query Cols	- SQL
	k on Course. k on Webpay reate New C Event Code Category AGLCT AGWBT	/Fvent Code to View the cou ge to view how the webpage course/Event Title Agile - Lean Champion Training White Belt Training	rse/event details. looks. Number of Offerings 1	Questions 0 2	Click to Webpage Webpage	Fee Rates Add New Fee Rate Fee Code Fee Rate Description Fee Amount € Active Click To No fee rates found.	- SQL

 $7. \quad \mbox{Select Course and Event Setup to display the following screen:} \\$

8. Select the correct ACTIVITY AREA from the drop-down list

: You may have access to one ACTIVITY AREA so the drop-down list may only include a single option.

- 9. Click the '+' to the right of the Fee Rates pane.
- 10. Click on the icon to the left of the Fee Rate you wish to amend.

This website uses consiles, by continu	ing you agree to their use. Learn mo	re about cookies and how to manage	them on our coolie pelky	Classe (8)	
UD Norse New Joint Operative Systems of	amb UKDUweedary UKDCornez to	Students Research Hu	Nero 👔 Tako 🔢	🕸 🛈 Q. 🗢 - 🧾 - e Campus Système	
Harre / Booking Centre / Course & Event Story	/ Add Fee Rate			7 4	
Add Fee Rate					
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Line Control C		UCD Home Anu Rosarth and Interaction UCD Genet Gringes & Schools	Useful Links Base Protocios OCD Privaty Statement Acceptable Une Policy	Contact Details Comparilies	

- 11. Make the relevant edits
- 12. Click SAVE for instant updates

HOW TO AMEND AN OFFERING - STEP-BY-STEP

Having followed the steps listed in How to Create an Offering – Step-By-Step page above the following are the steps to amend an Offering.

1. Clicking on the number of Offerings hyperlink will display relevant details for all the offerings included in that event:



2. Click on Advanced Options to view the following screen:

Home / Booking Centre / Course & Eve	ent Setup / Offerings of AGWBT / Edit an existing Offering
Edit an existing) Offering
Title	White Belt Training June 2017 Title that attendees see in course or event catalogues
Offering Status	Displayed on web but not bookable *
Start Date	23 Jun 2017
End Date	Start date displayed to attendees 23 Jun 2017 End date displayed to attendees
Active*	8
Booking Information	
Booking Start Date	19 May 2017 Date bookings will open
Booking End Date	A. 1

- **Note:** It is not possible to add Hypertext in the Booking message field (Booking Information section) displayed on this screen.
 - 3. As when creating the Offering complete the various text-boxes and select drop-down choices as appropriate.
- Note: OFFERING STATUS may help as a form of advertising before bookings online become available. (DISPLAYED ON WEB BUT NOT BOOKABLE) ensures that the event is visible in advance of it being available for booking).
 - DISPLAYED ON WEB AND BOOKABLE Use this status in conjunction with the Booking start dates
 this will automatically make the offering available for booking on that date.
 - DISPLAYED ON WEB AND NOT BOOKABLE This status will make people aware that there will be an offering – but bookings are not possible.

- ✓ Not DISPLAYED ON WEB Use this status when still creating and/or making updates on the offering details. The offering is not visible with this status.
- ✓ Course Full This status will automatically be displayed when the offering capacity is reached.

Flates booked			
Capacity	15	\$	
Online Capacity (if different to total)			
	Use this to limit	the number of places available for online (self-) b	ooking
Special Capacity (if applicable)			
Special Capacity (if applicable)	Used only in sp	ecialist areas in Booking Centre	

The CAPACITY section deals with the numbers for the offering.

Nore: Leaving this field blank will prevent any bookings being made onto your event – regardless of what other settings have been applied.

NOTE: PLACES BOOKED will update dynamically,

- **Note:** Using **Online Capacity** will save places to be available for people who arrive on the day without having booked in advance.
- **Note:** Using **MINIMUM ATTENDEES** will automatically cancel the programme if too few bookings are made on or before a set-date.
 - 4. COURSE SCHEDULE can be used to include an itinerary for the event (if required). This field is not mandatory.

Scheduling Informat	tion	
No. of Sessions	1	
Day of the Week	Friday 👻	
Start Time	09:30	
	Please use 24 hour format e.g. 07:30 NB Use a ':' not a '.' as time separator	
Duration	З	
	In hours (or in minutes if more appropriate).	
Course Schedule		
		2
	If entered, will be displayed as part of booking process.	300 characters left

5. **RESOURCES, LOCATION** and **ADMINISTRATIVE DETAILS** are specific to the Offering and may/not merit completion – this is at the organisers discretion.

- **Note:** The 3 fields in the Location section will ensure details are included in the email response sent when a successful booking is completed. The UCD Building drop-down list includes buildings from Belfield and Blackrock campuses. If the offering is scheduled off-site then details should be included in the Location and Room fields.
 - 6. **BANNER** INTEGRATION details are only relevant if the event is being tied into Continuing Professional Development (CPD), School of Medicine, School of Veterinary Medicine or Adult Education event.

Note: Please contact <u>Infohub@suport.ie</u> if you plan to run such an event.

How To ADD A MANUAL BOOKING

1. Follow the steps 1 - 3 (page above) to display the screen below:

ooking Manag	geme	ent								
t Activity Area: Agile Training					- C					
urrent Courses										-
						the states				
ick on Places Reaked to view all	course par	cticinante C	lick on Add M		CID (1) 1/3 / 1/3 1/3 1/7	NULLEY AN EXCLUSION FROM				
ick on Places Booked to view all	course par	rticipants. C	lick on Add M	lanual Bool	king to create a co	ourse booking.				
ick on Places Booked to view all	course par Start Date	End Date	lick on Add M Duration (Hours)	Booking Fee E	Booking Start Date	Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to
ick on Places Booked to view all	Start Date	End Date	Duration (Hours)	Booking Fee €	Booking Start Date	Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to
ick on Places Booked to view all Course Description Category GLCT - Agile - Lean Champion raining	Start Date	End Date 07 Jun 2017	Duration (Hours)	Booking Fee E	Booking Start Date	Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to Manual Booking
Course Description Course Description Course Description Category	Start Date 07 Jun 2017 23 Jun 2017	End Date 07 Jun 2017 23 Jun 2017	Duration (Hours) 7.50 3.00	Booking Fee E	Booking Start Date	Booking End Date 05 Jun 2017 22 Jun 2017	Course Capacity 15 15	Minimum Required	Places Booked 0 1	Click to Manual Booking Manual Booking

2. Click MANUAL BOOKING on the far right of the screen to display the screen as follows:

me / Booking Centre / Booking Ma	nagement / Manual Booking	? 🗷 🖴 🔶
fanual Bookin	a	
asa antar tha relevant details of th	a manual honking halow. Cirk on the Subwit hotton to maste the honking	
	in una stan grannelli annani menin an an' annenn danner i a cistari ant annendit.	
Create New Person		
Name	Susan Gray	
Course/Event	AGWET - White Belt Training june 2017 *	
	Choose the relevant course from the list provided.	
Booking Date		
	e.g. 23 May 2017	
Booking Amount	.00	
Discount Code		
	Enter the relevant discount code.	
Discount Amount		
Amount Paid		
	Enter payment amount received	
Summer Method		

Complete all the relevant fields and click Save when complete.

- Note: Payment Method <u>must be</u> CREDIT CARD PERSON NOT PRESENT if they are not present when making the payment, or if the status is TRANSFER FROM ANOTHER COURSE; booking status <u>must be</u> MANUAL BOOKING CONFIRMED
- Note: A 'Booking Status' <u>must be</u> selected from the drop-down list in order to ensure that the booking is visible in the Booking Management (see page) function.



Note: To apply a discount please see How To 'Add Discount Code' To A Manual Booking page below)

How To Add Questions To An Event:

- 1. Follow the steps listed above in Create an Event: Step-By-Step page to view the event created.
- 2. The following screen will be displayed:

0	urse	& Event Set	ามว					
~	aroc	a Brent oct	чÞ					
ect /	Activity Area	a: Agile Training				. 6		
ham	cements to	o this screen draw together	all information which	h relates	to Courses &	Events including fee rates, discounts etc		
lick	on Course	/Event Code to view the cou	rse/event details.			Fee Rates		-
lick	t on Course t on Webpa	Event Code to view the councer to view how the webpage	rse/event details. looks.			Fee Rates		-
lick	k on Course k on Webpa	e/Event Code to view the cou age to view how the webpage	rse/event details. looks.			Fee Rates		-
lick lick	i on Course i on Webpa	a/Event Code to view the cou age to view how the webpage Course/Event	rse/event details. looks.			Fee Rates Add New Fee Rate		-
iid Cr	k on Course k on Webpa reate New C	#/Event Code to view the cou age to view how the webpage Course/Event	rse/event details. looks.			Fee Rates Add New Fee Rate		-
lick lick	e on Course e on Webpa reate New C	#/Event Code to view the cou age to view how the webpage course/Event	rse/event details. looks. Number of			Fee Rates Add New Fee Rate Fee Rate Description	Fee Amount € Active Click To	
ilci ici	e on Course con Webpa reate New C Event Code	/Event Code to view the cou ge to view how the webpage course/Event	Number of Offerings Qu	estions 0	click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description	Fee Amount C Active Click To	
	k on Course k on Webpa reate New C Event Code Lategory	/Event Code to view the cou ge to view how the webpage Course/Event	rse/event details. looks. Number of Offerings Qu	estions 0	click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description No fee rates found.	Fee Amount C Active Click To	
	e on Course e on Webpa reate New C Event Code Category AGLCT	VEvent Code to view the cou ge to view how the webpage course/Event Title Adde - Lean Champion	Iooks. Number of Offerings Qu	estions 0	Click to	Fee Rates Add New Fee Rate Fee Code Fee Rate Description No fee rates found.	Fee Amount C Active Click To	
	e on Course e on Webpa reate New C Event Code Category AGLCT	//tvent Code to view the cou- age to view how the webpage Course/Event Title Agile - Lean Champion	Number of Offerings 1	estions 0	Click to	Fee Rates Add New Fee Rate Fee Rate Description No fee rates found.	Fee Amount C Active Click To Edit Query Query Cols	SQL
	e on Course e on Webpa reate New C Event Code Eategory AGLCT AGWBT	VEVent Code to view the cou- age to view how the webpage Course/Event Title Agile - Lean Champion Training, White Belt Training	Number of Offerings 1	estions 0	Click to Webpage Webpage	Fee Rates Add New Fee Rate Fee Rate Fee Rate Description No fee rates found.	Fee Amount C Active Click To Edit Query Query Cols	SQL

- 3. Click on the hyperlink under NUMBER OF QUESTIONS to display the following screen:
- 4. Click ADD A QUESTION and complete the fields as per the screen below:

Question ID*	2 - Special Requirements	A
Course/Event		
Grouping Code	1 - Attendee Name	-
Mandatory	2 - Special Requirements	
5.500 State 1997	3 - Email Address	
	4 - College/Company	
Order	5 - Conference Dinner	
	6 - Dietary Requirements	
	7 - Paper Title	

Nore: The Question ID will be issued by the Infohub Support team as part of the setup of your

Booking Centre. The MANDATORY and ORDER fields are the most important.

Note If your question is **MANDATORY** you must advise the Infohub Support team to ensure that this flag is set in the database as well as at the event level.

Note: The **O**RDER field ensures that the questions will be listed in the correct order when people are booking a place. It is suggested that you list the running order as 10,20,30 etc. – if you have to add new questions then you don't have to re-number all the questions on your list.

NOTE: Neither the MANDATORY or the ORDER fields are mandatory.

- 5. To DELETE A QUESTION simply click on the Bin icon on the last column on the right-hand side of the screen.
- 6. Click **OK** on the Query dialogue now displaying on the screen



7. This will successfully remove the question as per screen below:



8. Use the Back button on your browser to exit this function.



ATTENDEE MANAGEMENT IN BOOKING CENTRE (ATTENDEE ENQUIRY):

ATTENDEE ENQUIRY SUMMARY

Using this function will enable you to find people who have registered onto an event:

- ✓ Dates (Event dates)
- Booking dates (From and To dates)
- Previous bookings for that person (confirmed and cancelled)

LOOKING UP ATTENDEES IN BOOKING CENTRE (ATTENDEE ENQUIRY):

1. Log into Infohub

(UCD.ie/Connect/Infohub/Systems/Booking Centre)

🕒 UCD : 🗙 🖉 UCD : 🗙 🦉 Welc: 🗙 👹 Ide	nt x 🗑 Welc: x 🗑 Cours x 🗑 Welc: x M Inbox x 😨 Univ
Secure https://sisweb.ucd.ie/usis/W_HU_M	ENU.P_DISPLAY_MENU?p_menu=IN-HOME
. Tutorial 👹 Help Pages (MSU Sup 👹 Domain Experts	for In 🗧 InfoHub Live 🍯 Support Monitoring D 👖 SQL Tutorial 🦉 SISTest2
UCD Home News and Opinion Key Dates Eve	nts Noticeboard UCD Directory UCD Connect
Wy services & information portal	
Welcome to InfoHu You must login with an Existing Account to acce	b ss this page.
Use an Existing Account Email, UCD ID or Connect Username	
Password	
Login <u>Forgot Password</u>	

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS





- 3. Select ATTENDEE ENQUIRY details to see the following screen:
- Key in details of the attendee you wish to query, click Search 4.



Note: More than one account may appear, ensure you have selected the right one

My services 8	information portal			Students	Research	Human Resource	ces Financ	e Cam	pus	System	15
Home / Booking Centre	Attendee Enquiry							0	2	•	-
Attendee I	Enquiry										
Book a Course/Event Person Details	Gray [STAFF] * C	ear C							
Select Attendee: Susar Book a Course/Event Person Details	Gray [STAFF Contact	t Details] * C	lear C			Other Detail	Is			
Book a Course/Event Person Details ID Number Name	Gray [STAFF Contact	t Details Mobile F	J V C	iear C iddress			Other Detail	ls Click to			
Book a Course/Event Person Details ID Number Name PC 4 Susan Course	Gray [STAFF Contact Email ay susan.gray@ucd.ie	t Details Mobile P] ▼ CI Phone No A 1659	ddress		Dublin 11	Other Detail Communication	ls Click to			

5. Selecting the attendee will show all the relevant details of the current and previous bookings

	perect Attenuee	susan Gr	IY [51AFF			Clear U											
	Book a Cours	e/Event															
	Person D	etalis									_			-			
	ID Number	Name	Conta Email	ct Details Mobile	Phone No	Address				Other Deta	ils Click to						
	PC	Susan Gray	susan.gray@ucd.	le	1659						Edit Or	iery Que	roy Cols SO	6			
	Poolting	Uistory															
Draft Eleven 7 [™]	¥ ↔	ilistory													-	Page 3	34 OF 5
				Start En	d Booking	Booking	Course Amount	Discount	Fees Paid Payment	Refund Amount Refun	d Refund	Special C	lick				
		Summer Terr	category	Date Da	te Date	status			C Ref	e Date	Ref	Regs C	o clickt				

AGWBT - White Belt Training 23 23 19 May Cancelled .00 .00 .00 .00 .00 View

How to Create a Discount Code In Booking Centre:

CREATE A DISCOUNT CODE SUMMARY

- 1. Discount codes are created for use by individuals when booking a place on an Offering.
- 2. The codes must be issued individually for use.
- 3. Discount codes can be date-driven they will only work before/after a date which is included when setting up the Discount Code (see page below).

How TO CREATE A DISCOUNT CODE: STEP-BY-STEP:

1. Log into Infohub

(UCD.ie/Connect/Infohub/Systems/Booking Centre)

🕒 UCD x 👹 UCD x 👹 Welcc x 👹 Ident	× 👹 Welc: × 👹 Cours: × 👹 Welc: × M Inbox × 🕎 Univ
Secure https://sisweb.ucd.ie/usis/W_HU_MEN	J.P_DISPLAY_MENU?p_menu=IN-HOME
. Tutorial 👹 Help Pages (MSU Sup 👹 Domain Experts for	In 👹 InfoHub Live 👹 Support Monitoring 🛙 T SQL Tutorial 🁹 SISTest2
UCD Home News and Opinion Key Dates Events	Noticeboard UCD Directory UCD Connect
Wy services & information portal	
Welcome to InfoHub	
You must login with an Existing Account to access	this page.
Use an Existing Account	
Email, UCD ID or Connect Username	
Password	
Login Forgot Password	

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS



- 3. Click on Course & Event Setup
- 4. Select the correct ACTIVITY AREA to display the following screen



	D My se	CD InfoHub ervices & information portal		:	Students	Resea	rch H	uman Resources	Finance	Campu	s S	System	s G
Home	e / Booking	Centre / Course & Event Setup							D	9 🗛 I	~ =	8	-
Сс	ourse	e & Event Setu	ıp										
Select	t Activity Ar	ea: Innovation Academy				• 0							
Enhai	ncements	to this screen draw together a	all information w	which relates t	to Courses &	Events in	luding fee	rates, discounts etc					
Enhar Clic	ncements ck on Cour ck on Webp	to this screen draw together a se/Event Code to view the cours bage to view how the webpage lo	all information w se/event details. ooks.	vhich relates t	to Courses &	Events in Fee	luding fee Rates	rates, discounts etc					-
Enhar Clic Clic	ncements ck on Cour ck on Webp Create New	to this screen draw together a se/Event Code to view the cours rage to view how the webpage is Course/Event	all information w se/event details. ooks.	vhich relates t	to Courses &	Events ind Fee	luding fee Rates Id New Fee	rates, discounts etc					-
Enhau Clic Clic	ncements ck on Courr ck on Webp Create New Event Code	to this screen draw together a se/Event Code to view the cours age to view how the webpage is Course/Event	all information v se/event details. ooks. Number of Offorings	which relates t	to Courses &	Events ind Fee	cluding fee Rates Id New Fee Fee Code	rates, discounts etc Rate Fee Rate Description	Fee Amount (E Active	Click 1	го	-
Enhar Clic Clic	ncements ck on Cour ck on Webp Create New Event Code	to this screen draw together a se/Event Code to view the cours age to view how the webpage is Course/Event	all information w se/event details. ooks. Number of Offerings	Questions C	to Courses & Click to	Events ind Fee	cluding fee Rates Id New Fee Fee Code NULL	rates, discounts etc Rate Fee Rate Description DEIS Fee	Fee Amount 0	E Active	Click 1 Remov	To	-
Enhar Clic Clic	ck on Cour ck on Cour ck on Weby Create New Event Code Code Category SUM2011	to this screen draw together a serEvent Code to view the cours age to view how the webpage in Course/Event Title UCD Innovation Academy Summer Camp	all information w se/event details. coks. Number of Offerings	Questions C	to Courses & Click to Vebpage	Events ind Fee Ad Ci	cluding fee Rates Id New Fee Fee Code NULL FULL	rates, discounts etc Rate Fee Rate Description DEIS Fee Full Fee	Fee Amount (.0) 100.00	C Active O Y O Y	Click	To ve	-

5. Scroll down to view the **DISCOUNT CODES** function (right hand side of the screen)

A	dd New Discount	Code			
	Discount Code	Description	Active	Click To	
Zi.	DEIS	Discount code for DESH Schools	Y		

6. Click ADD NEW DISCOUNT CODE to see the following screen

Home / Booking Centre / Course & Event Setup	o / Add Discount Code	4
Add Discount Code	e	
Discount Code*	CTWSE	
Description	Citywise Discount SUM2017	
Discount Percent %		
Discount Amount	Percent value of the discount. Enter either the percent or the value of the discount, please do not enter both. 80 Value amount of the discount. Enter either the percent or the value of the discount, please do not enter both.	
Activity Owner	Innovation Academy 👻	
Start Date	01 Jun 2017 e.g. 01 Jun 2017	
End Date	02 Jun 2017 e.g. 01 Jun 2017	
Active*	×	
Save		

NOTE: Use either the DISCOUNT PERCENT % OR the DISCOUNT AMOUNT field

- 7.
- 8. Complete the relevant details and click SAVE.

Note: The **start** and **end** date fields relate to when the **discount** is available. This may or may not be the same as the event dates or the event booking dates.

NOTE: Click the ACTIVE^{*} field to display the DISCOUNT CODE; leave it un-checked to 'hide' the DISCOUNT CODE.

9. Having clicked SAVE your screen will now return to the screen below. Click Refresh (F5) on the keyboard to display the new DISCOUNT CODE.

A	dd New Discount	Code			
	Discount Code	Description	Active	Click To	
Ø	CTWSE	Citywise Discount SUM2017	Y	Remove	
C)	DEIS	Discount code for DESH Schools	Y		

10. When adding in an Attendee and applying a discount please see How To 'Add Discount Code' To A Manual Booking (page below).



How TO ADD AN ATTENDEE IN BOOKING CENTRE (REGISTERING A MANUAL BOOKING TO AN EVENT)

1. Log into Infohub (UCD.ie/Connect/Infohub/Systems/Booking Centre)

🕒 UCD : x V 👹 UCD : x V 👹 Welc: x V 👹 Iden	t x 🗑 Welc: x 🗑 Cours x 🗑 Welc: x 🎦 Inbox x 😰 Univ
Secure https://sisweb.ucd.ie/usis/W_HU_ME	NU.P_DISPLAY_MENU?p_menu=IN-HOME
. Tutorial 👹 Help Pages (MSU Sup 👹 Domain Experts f	or In 🍯 InfoHub Live 🍯 Support Monitoring 🛛 T SQL Tutorial 🍯 SISTest2
UCD Home News and Opinion Key Dates Ever	ts Noticeboard UCD Directory UCD Connect
Wy services & information portal	
Welcome to InfoHu You must login with an Existing Account to acces	D ss this page.
Use an Existing Account Email, UCD ID or Connect Username	
Password	
Login <u>Forgot Password</u>	

2. Or click on the following link:

https://sisweb.ucd.ie/usis/W_HU_MENU.P_DISPLAY_MENU?p_menu=IN-SYSTEMS



- 3. Click on BOOKING MANAGEMENT (for more details see page)
- 4. Select the correct ACTIVITY AREA to display the following screen

The 7 booking centre 7 Booking Managemen	it.							? 🗋	₽₩∥	
ooking Managem	nent									
ect Activity Area: Innovation Academy					• ©					
Current Courses										
Click on Places Booked to view all course p	participants. C	lick on Add	i Manual Bo	oking to cr	eate a course bo	oking.				
Click on Places Booked to view all course p Course Description	oarticipants. C Start Date	lick on Add	Manual Bo Duration (Hours)	oking to cr Booking Fee E	eate a course bo Booking Start Date	bking. Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to
Click on Places Booked to view all course p Course Description	Start Date	End Date	Manual Bo Duration (Hours)	oking to cr Booking Fee E	eate a course bo Booking Start Date	Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to

5. Click on MANUAL BOOKING to display the following screen:

Manual Bookir	
Manual DOOKII	19
Please enter the relevant details of t	the manual booking below. Click on the Submit button to create the booking.
Create New Person	
Name	Check Name
Course/Event	SUM2017 - UCD Innovation Academy Summer Camp 2017 🔹
	Choose the relevant course from the list provided.
Booking Date	
	e.g. 01 Jun 2017
Booking Amount	100.00
Discount Code	
	Enter the relevant discount code.
Discount Amount	
Amount Paid	
	Enter payment amount received

- 6. Complete the relevant fields
 - a. Click **CHECK NAME** to ensure the name is already in the database. If the name is recognised then **Valid Person** will be displayed, if not please progress to Step 7 below.

Note: Should there be more than one person of the same name a drop-down list will appear. Choose the correct person from the drop-down list. The email address is a unique identifier; however it is still essential to click the CHECK NAME button to ensure that you have the right person.

7. Click CREATE NEW PERSON to display the following screen:

Home / Booking Centre / Booking Mar	agement / Manual Booking / Create New User	☞ 음 ←
Create New Use	PL	
Please enter the following details to c	reate a new user.	
Primary Person Type*	Second Level School Student	
Person Details		
First Name	Sunil	
Last Name	Jain	
Title	Mr 👻	
Date of Birth	01 Jun 2007	
	e.g. 01 Jun 2017	
Gender	Male 🔻	
Organisation	Citywise	
	If relevant, please enter your Organisation, College, GP Practice or Vet Practice etc.	

8. Click SAVE to show the screen below

ł	lome / Edit Person Details
]	Edit Person Details
	Redirecting back to enquiry page for Sunil Jain
	Return to previous screen

9. Click RETURN TO PREVIOUS SCREEN to display the screen below

Ne 7 Accendee	Enquiry							C.		Q
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NOTE: Ensure that the **Select Attendee** field is displaying the correct details.

10. Click BOOK A COURSE/EVENT to display the following screen

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ect Activity Area: Innovation Academy				¥	Ø						
er Courses: Filter											
View Basket											
View Basket	es. Click on J	Add to Bas	ket to purch	ase a cou	rse on behalf of an	attendee.					
View Basket .isted below are details of all your current course Course Title	s. Click on A Start Date	Add to Basi	ket to purch. Status	ase a cou Start Time	rse on behalf of an	attendee. Fee €	Tutor	Capacity	Minimum Attendees	Places Booked	Click to

- 11. Select the correct ACTIVITY AREA and then FILTER COURSES to display the correct event.
- 12. Click ADD TO BASKET to display the following screen

ome / Attendee Enquiry / Manual Bookings / Additional Booking Details	۲ 🔒
Additional Booking Details	
Participants' name*	
Home Telephone No.*	
Mobile No*	
Home Address*	
Emergency Contact (usually a parent) -	ĥ
First Name*	
Emergency Contact (usually a parent) - Last Name* :	
Emergency Contact (usually a parent) - Email Address*	
Emergency Contact (usually a navent)	

Note: All fields marked * must be completed.

13. Complete all the relevant details and click ADD TO BASKET to display the following screen:

ode	Title	Qty	•				
UM2017	UCD Innovation Academy Summer Camp 2017		100.00	Remove	Add Discount Code	Edit Booking	Book an Additional Place
	Total Charge		100.00				

14. Click ADD DISCOUNT CODE if required. If not please click PROCEED TO CHECKOUT to display the following screen

How To 'ADD DISCOUNT CODE' TO A MANUAL BOOKING

15. Having followed all the steps listed (1 to 14) above click ADD DISCOUNT CODE to display the following screen:



16. Click **S**AVE to view the following screen:

Code	Title	qty	•					
SUM2017	UCD Innovation Academy Summer Camp 2017		100.00	Remove	CTWSE applied	Edit Booking	Book an Additional Place	
	Less Discount		80.00					
	Total Charge		20.00					

Note: Click BOOK AN ADDITIONAL PLACE to continue to book places on this event. Note: Click Add Additional Item to book this person onto another course.

17. Click **PROCEED TO CHECKOUT** to complete the transaction.





BOOKING CENTRE REPORTS - 'MANAGEMENT INFORMATION' - AN OVERVIEW

Principally financial reports are included in this menu option. For non-ticketed events it is also relevant to view this function however the most valuable data relates to the payments:

- When
- Who
- How much?

BOOKING CENTRE DAILY RECEIPTS

Select the correct ACTIVITY AREA from the drop-down list.

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	29 May 2018		10.00	20.00							
	24 May 2018		20.00	20.00							
	23 May 2018		210.00	270.00							
	22 May 2018	118.00	595.00	790.00							
	21 May 2018	140.02	483.62	545.00							
	20 May 2018		213.60	315.00							
	19 May 2018		190.00	124/44							

1. Click on the hyperlink number to display details of the payments which comprise that total figure.

Note: There are two headings – one for **CREDIT CARD** (MANUAL) payments (recorded in UCD by using a hand-held device) and the other for **CREDIT CARD ONLINE BOOKING** payments.

2. Clicking on the Total number will display all the details of the payments and who made them as per screen-shot below:



REFUND PROCESSING INFORMATION

- 1. All refunds are processed manually and must be referred to <u>accounts.queries@ucd.ie</u> who will advise of the process. All refunds awaiting processing will be visible in this screen.
- 2. To make amendments to an individual refund click UPDATE REFUND DETAILS and the MANUAL BOOKING SCREEN will display.
- 3. Update the relevant details and Click **S**AVE.

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CREDIT CARD REFUNDS ISSUED - AN OVERVIEW

Displayed here are a list of the credit card refunds that have been approved.

Note: There are no hyperlinks in this screen so it is not possible to edit any of the details here.



FINANCIAL SUMMARY BY ACADEMIC YEAR - AN OVERVIEW

Displayed here are details of the Income and Expenditure across Booking Centre by academic year.

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Academic Year 2014/2015	974 520 85 -62 344 90	-26.513.65 885.662.30	899.184.75	-26.513.65	872.671.10	12,991,20				
Academic Year 2015/2016	1.193.936.09 -85.294.55	-18.858.75 1.009.782.79	1.093.823.09	-18.858.75	1.074.964.34	14,818.45				
Academic Year 2016/2017	1,644,883.55 -87,742.65	-17,122.95 1,540,017.95	1,551,836.40	-17,122.95	1,534,713.45	5,304.50				
Academic Year 2017/2018	1,932,959.73 -83,518.70	-12,903.00 1,836.538.03	1,841,186.48	-12,903.00	1,828,283.48	14,800.55				
Academic Year 2018/2019	1,803,179.20 -\$2,804.35	-7,109.35 1,243,765.50	1,241,472.55	-7,109.35	1,234,363.20	9,412.80				
Academic Year 2019/2020	.1503	.00 .12	.12	.00	.12	.00				
Total	7,800,565.77 -395,278.90	-116,000.47 7,288,286.40	7,352,381.94	-116,000.47	7,236,381.47	57,960.93				
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CANCELLED BOOKINGS FOR ALL COURSES

Clicking on any of the hyperlinks will display further details of the person or the offering.
 Note: this report includes all the cancelled bookings in Booking Centre. It is therefore slow to load.
 UPDATE REFUND DETAILS displays the MANUAL BOOKING screen (as per page above). Amendments can

be made here if required.



INCOME SUMMARY

2. All the income into Booking Centre is displayed under the headings FEES and NUMBER OF STUDENTS. Scrolling to the right will show the more recent data

Note: Given the level of data included in this report the screen may be slow to load



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Adult Education Courses by Venue, Day or Term

1. Select the correct Term from the drop-down menu.

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2. Click on the hyperlinked numbers to display the 'Courses on Belfield Campus', 'Courses on Blackrock campus' or 'Courses on Other Campuses'

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