



UCD IT Services

BOOKING CENTRE:
CREATING EVENTS, BOOKING
MANAGEMENT & GENERAL REPORTING
STEP-BY-STEP

TABLE OF CONTENTS

Booking Centre – An Overview:	4
Course & Event Setup	4
‘Subject/Category’ Explained:	4
‘Events’: What and Why:	5
‘Offerings’ – What and How:	5
Communicating with attendees: ‘How’ and ‘To whom’:	5
Booking Management – An Overview	6
Manual Booking:	6
Edit Booking / Edit Booking Details /Cancel booking:	6
How To Create A Subject/Category In Booking Centre:	7
Create A Subject/Category Summary	7
How to create a Subject/Category	7
How To Create An Event In Booking Centre:	9
Create an Event Summary	9
Create an Event: Step-By-Step	9
How To Amend An Event In Booking Centre:	14
Amend an Event Summary	14
How To Create An Offering In Booking Centre:	15
Create an Offering Summary	15
How to Create an Offering – Step-By-Step	15
Amend an Offering Summary	16
How To Create a Fee Rate	18
Create a Fee Rate Summary	18
How to Create a Fee Rate – Step-by-Step	18
How to Amend a Fee Rate – Step-by-Step	19
How to Amend an Offering – Step-By-Step	22
How To Add A Manual Booking	25
How To Add Questions To An Event:	26
Attendee Management in Booking centre (Attendee Enquiry):	28
Attendee Enquiry Summary	28
Looking up Attendees in Booking centre (Attendee Enquiry):	28
How to Create a Discount Code In Booking Centre:	31
Create a Discount Code Summary	31
How To Create a Discount Code: Step-By-Step:	31
How to Add an Attendee in Booking Centre (Registering a Manual Booking to an Event)	34
How To ‘Add Discount Code’ To A Manual Booking	37
Booking Centre Reports – ‘Management Information’ - An Overview	39
Booking Centre Daily Receipts	39
Refund Processing Information	39
Credit Card Refunds Issued – An Overview	40
Financial Summary by Academic Year – An Overview	41



Cancelled Bookings for all Courses	41
Income Summary	42
Adult Education Courses by Venue, Day or Term	43



BOOKING CENTRE – AN OVERVIEW:

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

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

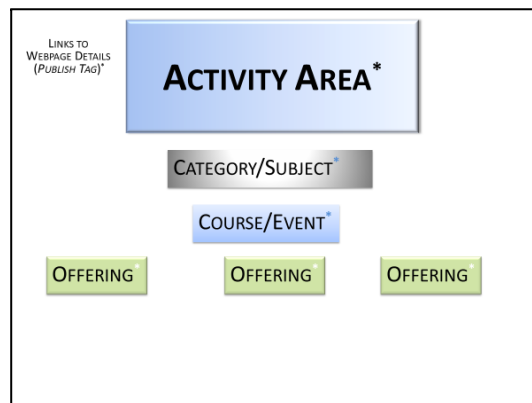
There are two primary functions which are included – ‘Course & Event Setup’ as well as ‘Booking Management’. These are linked to event logistics and attendees respectively.

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 (**NOTE** 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 by emailing eag.support@ucd.ie.

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 (**NOTE** 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. (**NOTE** 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.



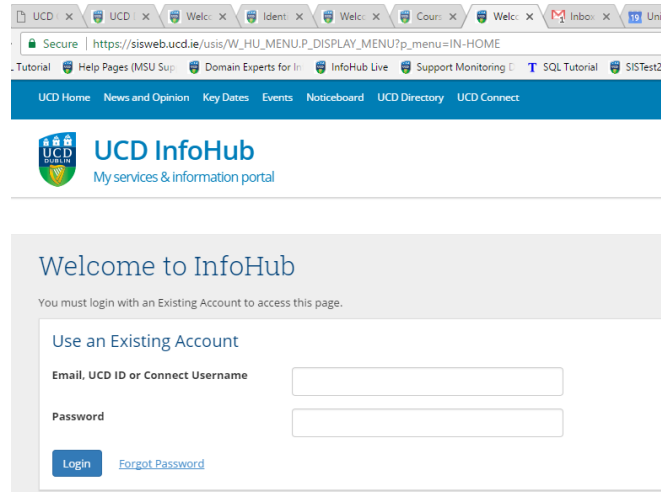
HOW TO CREATE A SUBJECT/CATEGORY IN BOOKING CENTRE:

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:

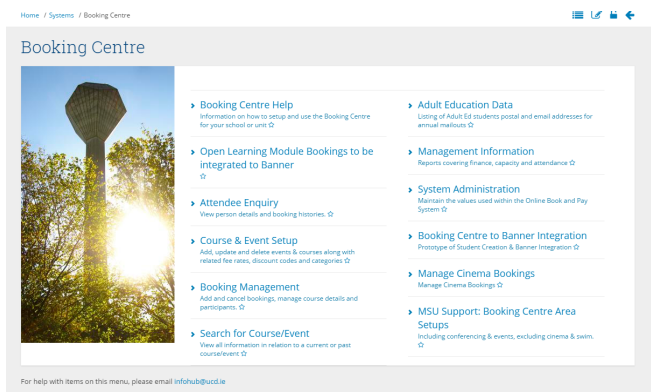
HOW TO CREATE A SUBJECT/CATEGORY

1. Log into Infohub



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**:

UCD Home News and Opinion Key Dates Events Noticeboard UCD Directory UCD Connect

UCD InfoHub My services & information portal

Students Research Human Resources Finance Campus Systems

Home / Systems / Booking Centre / Course & Event Setup

Course & Event Setup

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

Event Code	Title	Number of Offerings	Questions	Click to
Category				
AGWBT	White Belt Training	1	0	Webpage
AGYBT	Yellow Belt Training	1	0	Webpage

Edit Query Query Cols SQL

Fee Rates

Add New Fee Rate

Fee Code	Fee Rate Description	Fee Amount €	Active	Click To
No fee rates found.				

Edit Query Query Cols SQL

Categories

Add New Category

Category Code	Category Description	Active
No categories/subject areas were found.		

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:

UCD InfoHub My services & information portal

Home / Booking Centre / Course & Event Setup / Add New Category

Add New Category

Enter all the relevant details and click **Save** to save the record.

Category Code*

Category Description

Activity

Save

A.

7. Complete all the fields above

NOTE: The **CATEGORY CODE** must be unique.

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:

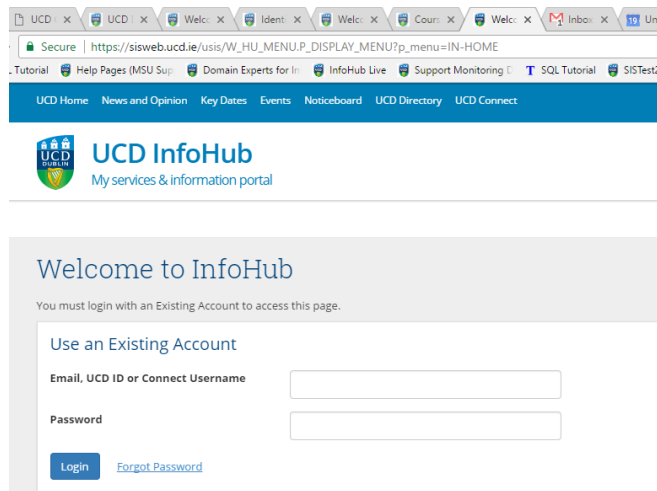
- ✓ Dates (Event dates)
- ✓ Booking dates (From and To dates)
- ✓ Times (start and end)
- ✓ Duration
- ✓ Capacity of event
- ✓ Automated response emails to confirm booking

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

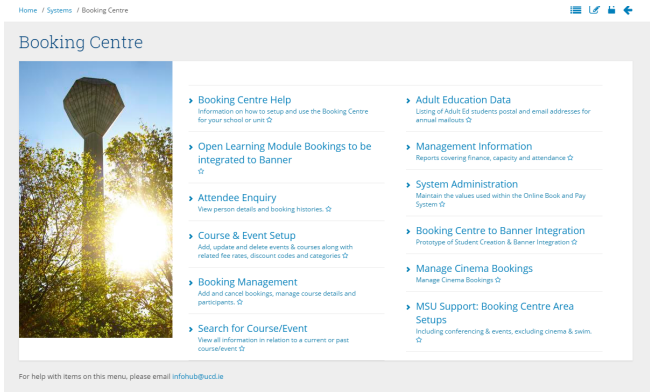
1. Log into Infohub



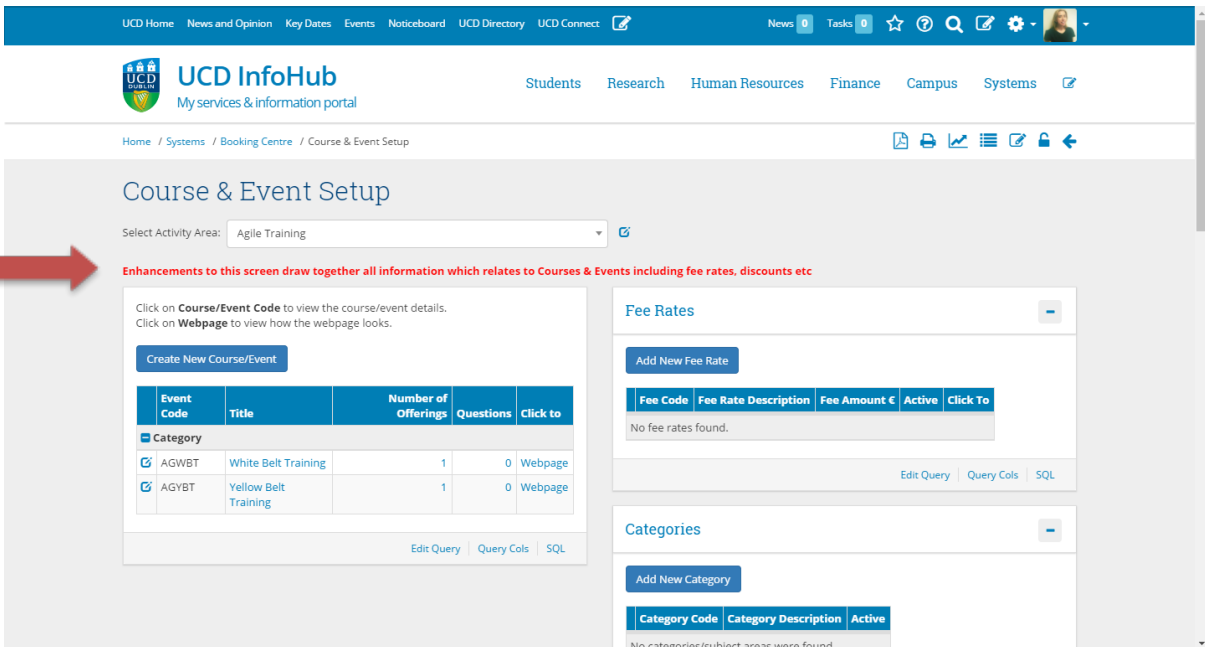
2. Or click on the following link:

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**:

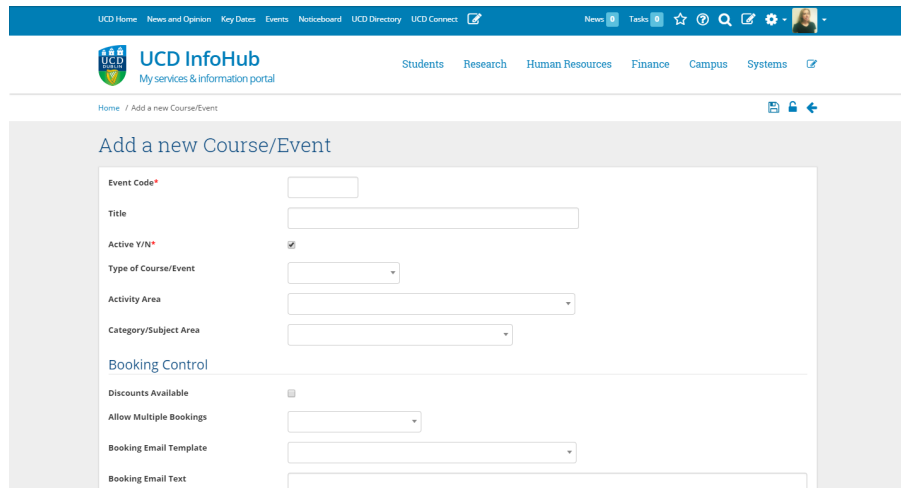


4. Select **ACTIVITY AREA** from the drop-down list (shown above to the right of the arrow) if applicable.

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).



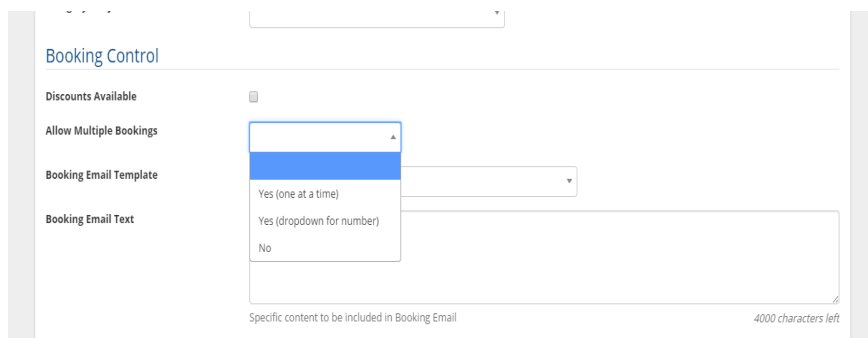
NOTE: Select the correct **ACTIVITY AREA** as per the drop-down selector on point 4 above. Otherwise your Event and Offerings will not display correctly.

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).



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 mail eag.support@ucd.ie. (BP-ACTYEML DEFAULT ACTIVITY CODE EMAIL is standard generic confirmation booking available for use if there is no event-specific email template).

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).

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 eag.support@ucd.ie 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 (https://sisweb.ucd.ie/usis/W_HU_MENU.P_PUBLISH?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 eag.support@ucd.ie 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 eag.support@ucd.ie 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 **SAVE** for instant updates.

HOW TO CREATE AN OFFERING IN BOOKING CENTRE:

CREATE AN OFFERING SUMMARY

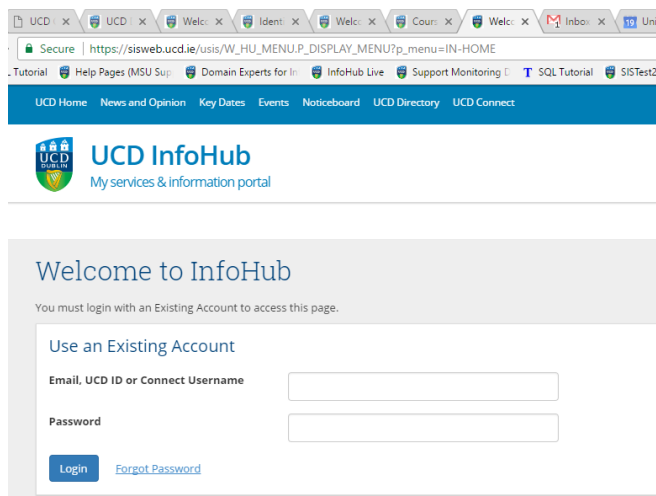
Using this function will enable you to create an Offering. At the Offering level the following fields are updated.

- ✓ **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 **SAVE** button is clicked.

HOW TO CREATE AN OFFERING – STEP-BY-STEP

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

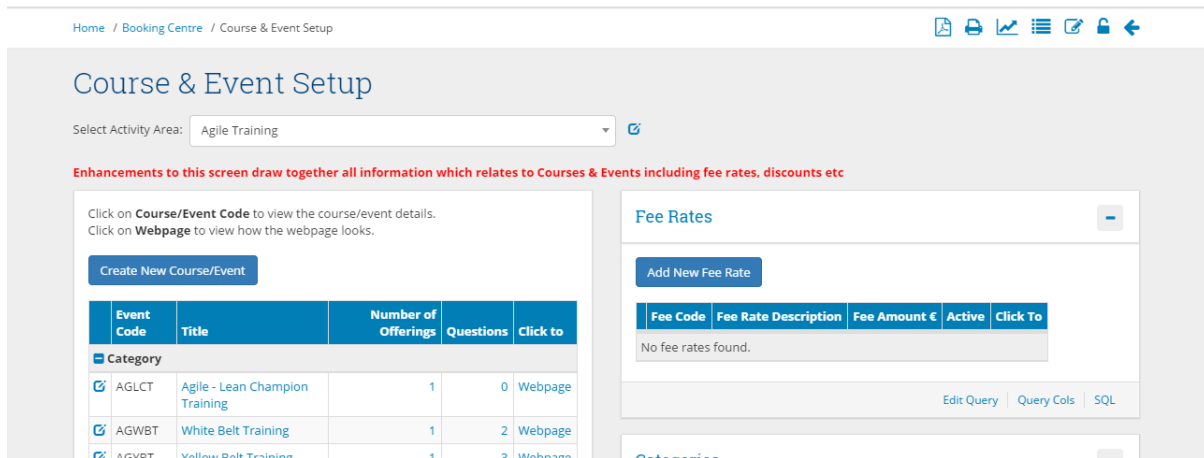


2. Or click on the following link:

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. 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 both 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.



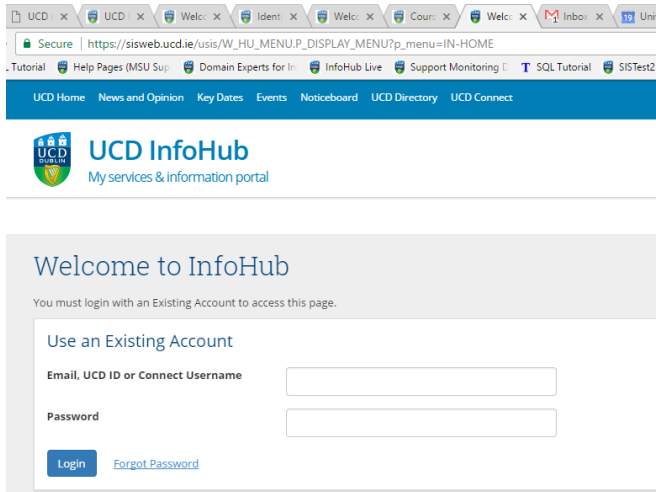
HOW TO CREATE A FEE RATE

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)

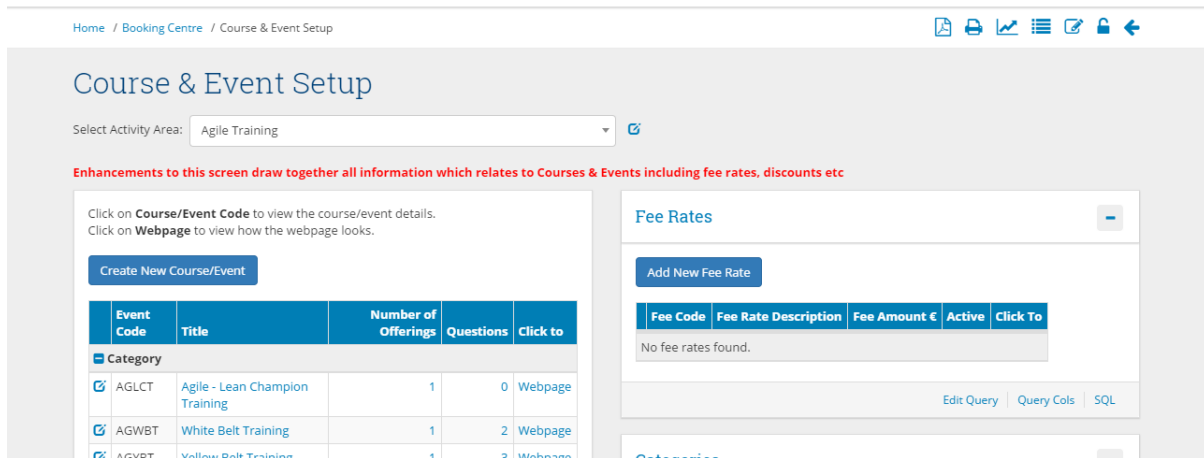


2. Or click on the following link:

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



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

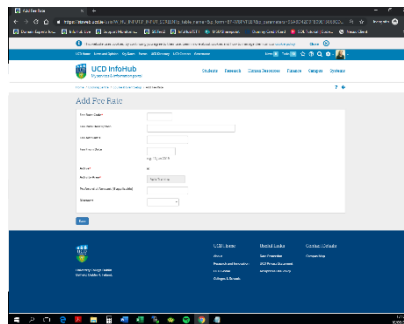


4. Select the correct **ACTIVITY AREA** from the drop-down list

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

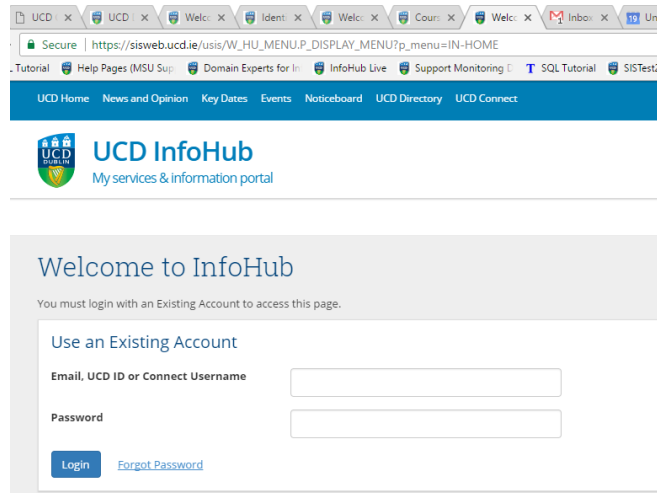
NOTE: It is essential that Fee rates have a unique code. Neither the code or the description are displayed to customers and so are only visible to event organisers.



- 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)

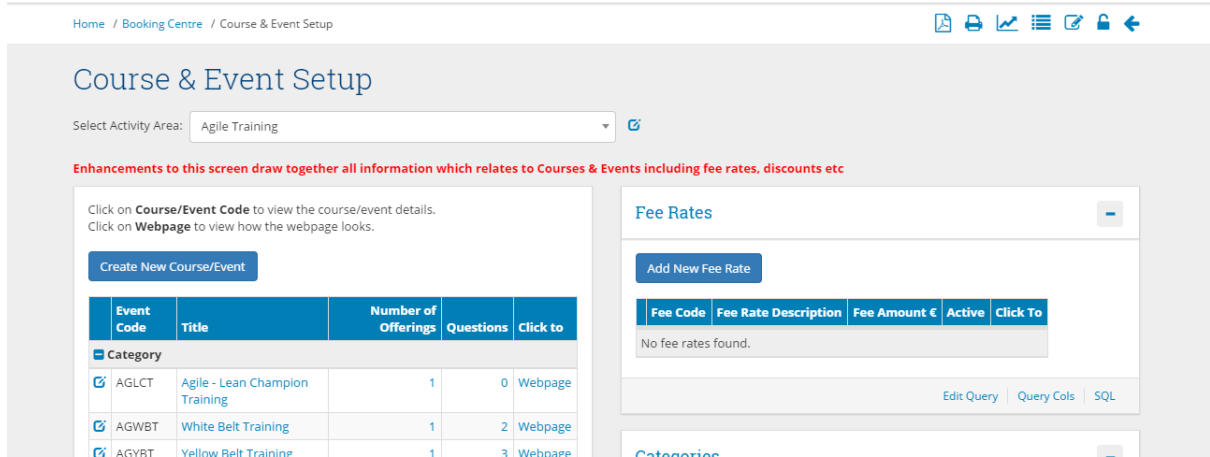


2. Or click on the following link:

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:

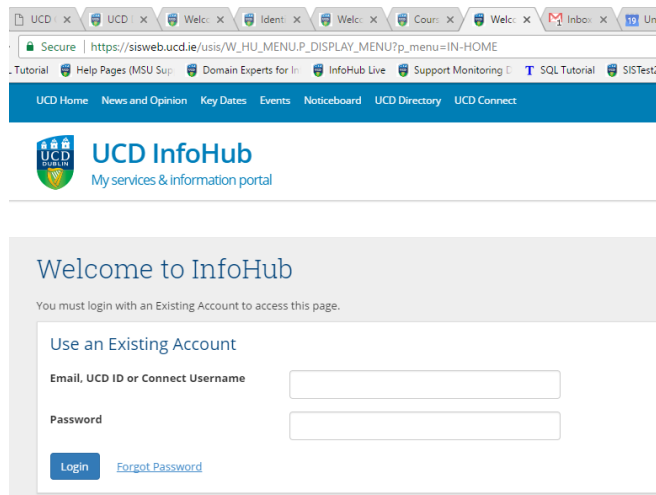


4. Select the correct **ACTIVITY AREA** from the drop-down list

: 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)

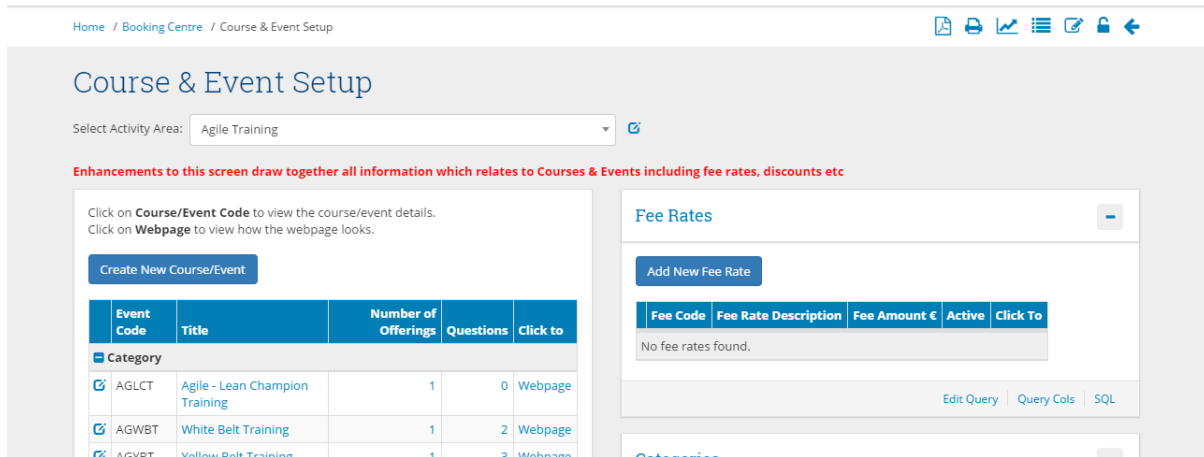


6. Or click on the following link:

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



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

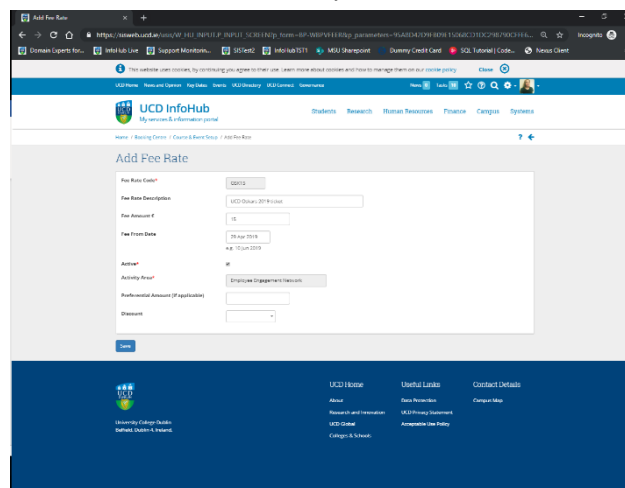


8. Select the correct **ACTIVITY AREA** from the drop-down list

: 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.



11. Make the relevant edits

12. Click **SAVE** for instant updates

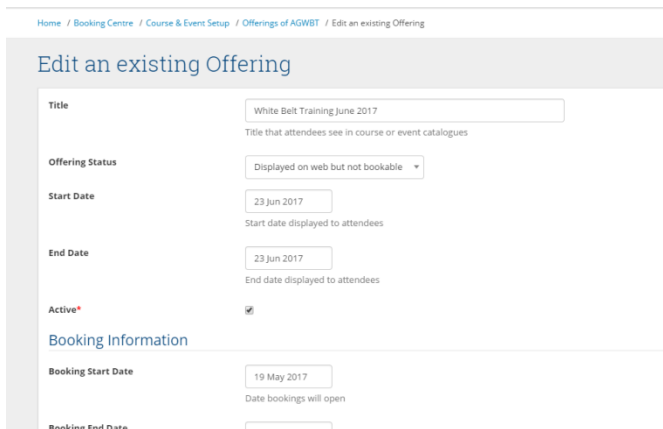
HOW TO AMEND AN OFFERING – STEP-BY-STEP

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:



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.

Capacity

Places Booked	<input type="text"/>
Capacity	<input type="text" value="15"/>
Online Capacity (if different to total)	<input type="text"/> <small>Use this to limit the number of places available for online (self-) booking</small>
Special Capacity (if applicable)	<input type="text"/> <small>Used only in specialist areas in Booking Centre</small>
Minimum Attendees	<input type="text"/> <small>Minimum number of attendees required for course/event to run</small>

The **CAPACITY** section deals with the numbers for the offering.

NOTE: 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 Information

No. of Sessions	<input type="text" value="1"/>
Day of the Week	<input type="text" value="Friday"/>
Start Time	<input type="text" value="09:30"/> <small>Please use 24 hour format e.g. 07:30 NB Use a ':' not a '.' as time separator</small>
Duration	<input type="text" value="3"/> <small>In hours (or in minutes if more appropriate).</small>
Course Schedule	<input type="text"/> <small>If entered, will be displayed as part of booking process. 300 characters left</small>

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

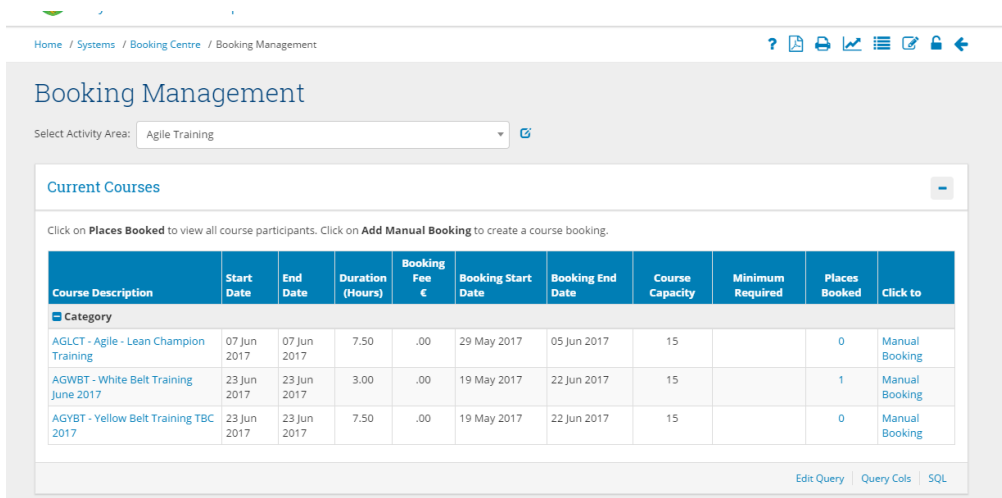
NOTE: The 3 fields in the Location section will ensure details are included in the email response sent when a successful booking is completed. The UCD Building drop-down list includes buildings from Belfield and Blackrock campuses. If the offering is scheduled off-site then details should be included 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.

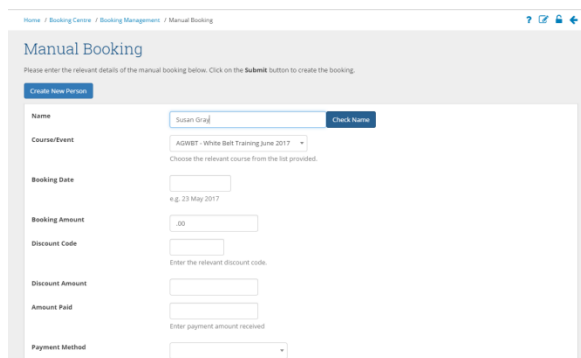
NOTE: Please contact Infohub@suport.ie if you plan to run such an event.

How To Add A MANUAL BOOKING

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



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



Complete all the relevant fields and click **Save** when complete.

NOTE: Payment Method **must be** **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 **must be** **MANUAL BOOKING CONFIRMED**

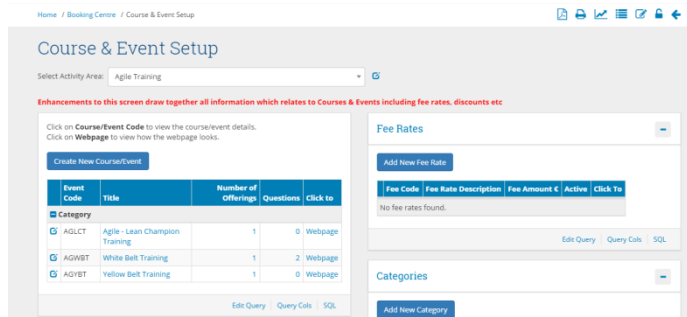
NOTE: A 'Booking Status' **must be** selected from the drop-down list in order to ensure that the booking is visible in the Booking Management (see page) function.



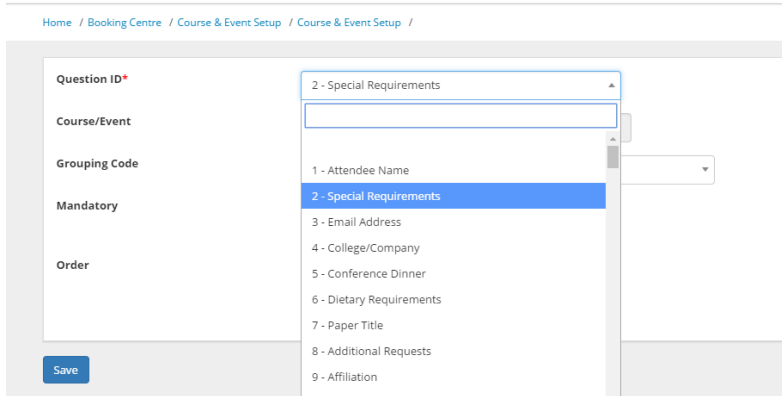
NOTE: To apply a discount please see How To 'Add Discount Code' To A Manual Booking page below)

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:



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:



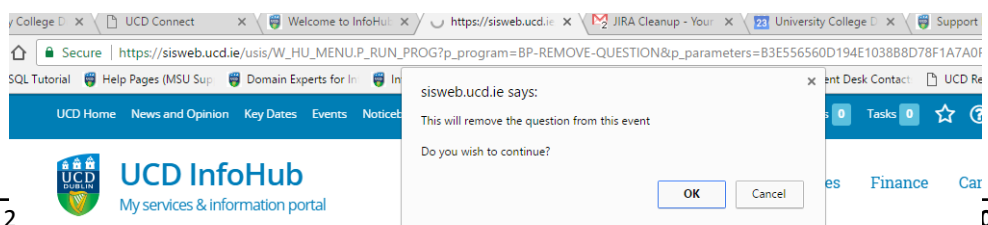
NOTE: The Question ID will be issued by the Infohub Support team as part of the setup of your Booking Centre. The **MANDATORY** and **ORDER** fields are the most important.

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.

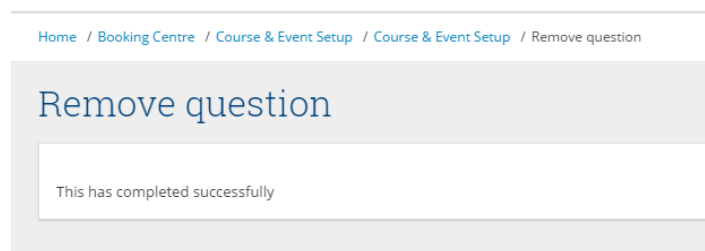
NOTE: The **ORDER** field ensures that the questions will be listed in the correct order when people are booking a place. It is suggested that you list the running order as 10,20,30 etc. – if you have to add new questions then you don’t have to re-number all the questions on your list.

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

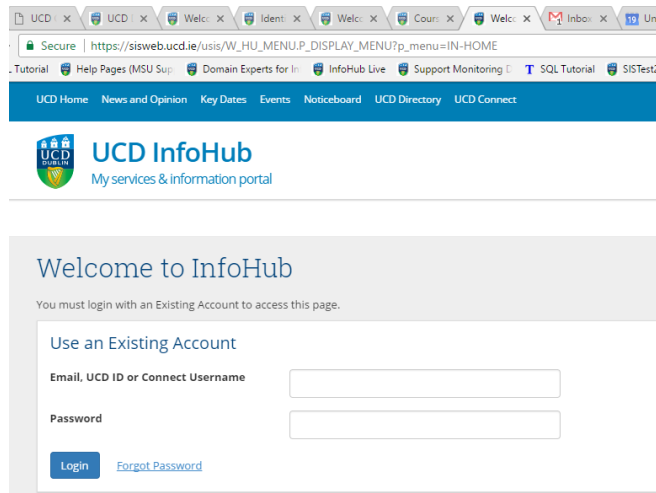
Using this function will enable you to find people who have registered onto an event:

- ✓ 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

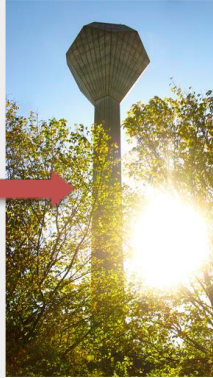
(UCD.ie/Connect/Infohub/Systems/Booking Centre)



2. Or click on the following link:

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

Booking Centre



- ▶ **Booking Centre Help**
Information on how to setup and use the Booking Centre for your school or unit ☺
- ▶ **Open Learning Module Bookings to be integrated to Banner**
☺
- ▶ **Attendee Enquiry**
View person details and booking histories. ☺
- ▶ **Course & Event Setup**
Add, update and delete events & courses along with related fee rates, discount codes and categories ☺
- ▶ **Booking Management**
Add and cancel bookings, manage course details and participants. ☺
- ▶ **Search for Course/Event**
View all information in relation to a current or past course/event ☺
- ▶ **Adult Education Data**
Listing of Adult Ed students postal and email addresses for annual mailouts ☺
- ▶ **Management Information**
Reports covering finance, capacity and attendance ☺
- ▶ **System Administration**
Maintain the values used within the Online Book and Pay System ☺
- ▶ **Booking Centre to Banner Integration**
Prototype of Student Creation & Banner Integration ☺
- ▶ **Manage Cinema Bookings**
Manage Cinema Bookings ☺
- ▶ **MSU Support: Booking Centre Area Setups**
Including conferencing & events, excluding cinema & swim. ☺

For help with items on this menu, please email infohub@ucd.ie

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

Attendee Enquiry

Select Attendee: [Advanced Search](#)

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

Attendee Enquiry

Select Attendee:

Person Details

Contact Details						Other Details	
ID Number	Name	Email	Mobile	Phone No	Address	Communication	Click to
PC 4	Susan Gray	susan.gray@ucd.ie		1659		Dublin 11	

1 rows took .03 seconds to run

[Edit Query](#) [Query Cols](#) [SQL](#)

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

Attendee Enquiry

Select Attendee:

Person Details

Contact Details						Other Details	
ID Number	Name	Email	Mobile	Phone No	Address	Communication	Click to
PC	Susan Gray	susan.gray@ucd.ie		1659			

1 rows took .03 seconds to run

[Edit Query](#) [Query Cols](#) [SQL](#)

Booking History

Course/Event Title	Category	Start Date	End Date	Booking Date	Booking Status	Course Amount	Discount	Fees Paid	Payment Ref	Refund Amount	Refund Date	Refund Ref	Special Prot.	Click to	Click to
<input type="button" value="Add"/> <input type="button" value="Remove"/>															



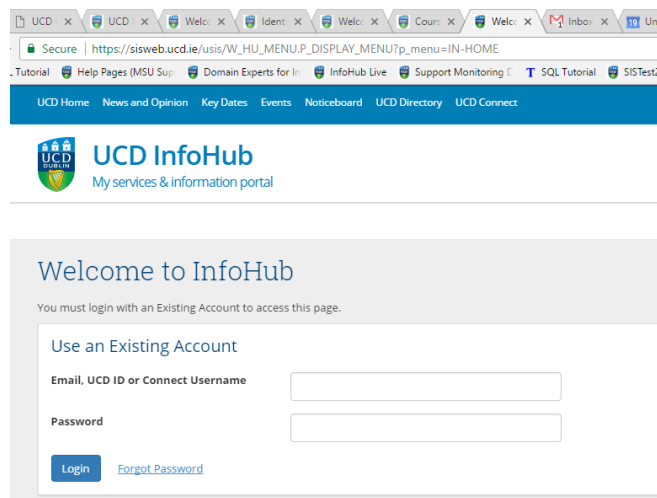
HOW TO CREATE A DISCOUNT CODE IN BOOKING CENTRE:

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).

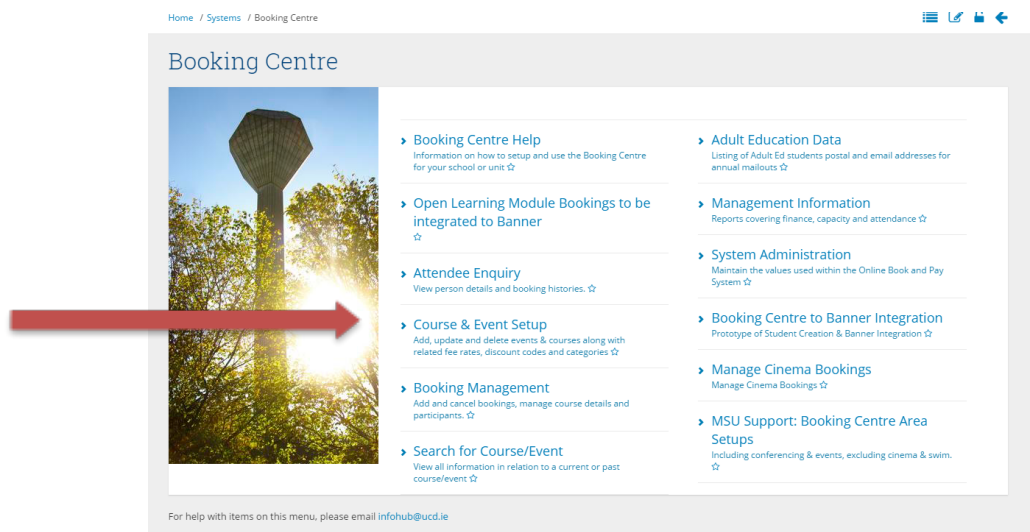
HOW TO CREATE A DISCOUNT CODE: STEP-BY-STEP:

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



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

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

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

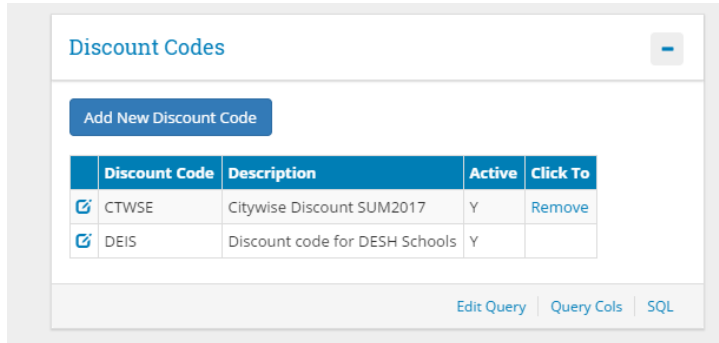
NOTE: Use either the **DISCOUNT PERCENT %** OR the **DISCOUNT AMOUNT** field

- 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**.



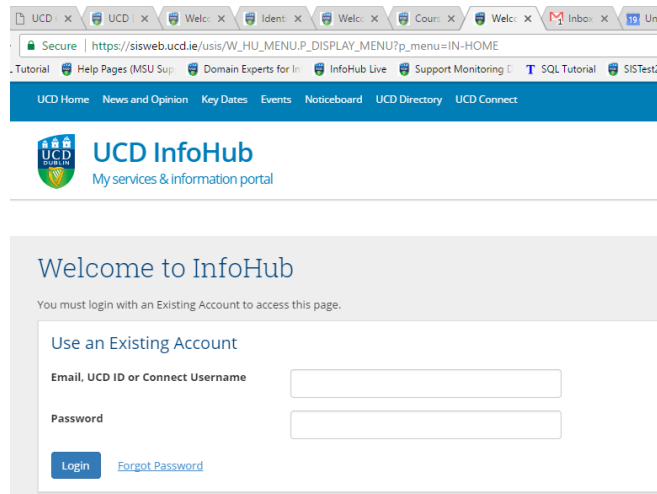
Discount Code	Description	Active	Click To
<input checked="" type="checkbox"/> CTWSE	Citywise Discount SUM2017	Y	Remove
<input checked="" type="checkbox"/> DEIS	Discount code for DESH Schools	Y	

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



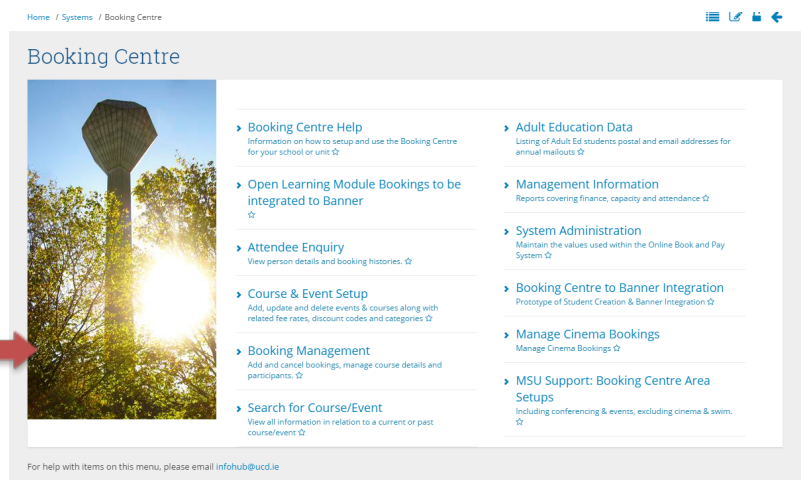
HOW TO ADD AN ATTENDEE IN BOOKING CENTRE (REGISTERING A MANUAL BOOKING TO AN EVENT)

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



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

Home / Booking Centre / Booking Management

Booking Management

Select Activity Area: Innovation Academy

Current Courses

Click on **Places Booked** to view all course participants. Click on **Add Manual Booking** to create a course booking.

Course Description	Start Date	End Date	Duration (Hours)	Booking Fee €	Booking Start Date	Booking End Date	Course Capacity	Minimum Required	Places Booked	Click to
SUM2017 - UCD Innovation Academy Summer Camp 2017	26 Jun 2017	30 Jun 2017		100.00	28 Apr 2017	26 Jun 2017	100		83	Manual Booking

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

Manual Booking

Please enter the relevant details of the manual booking below. Click on the **Submit** button to create the booking.

Create New Person

Name

Course/Event
Choose the relevant course from the list provided.

Booking Date
e.g. 01 Jun 2017

Booking Amount

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 Management / Manual Booking / Create New User

Create New User

Please enter the following details to create a new user.

Primary Person Type*

Person Details

First Name

Last Name

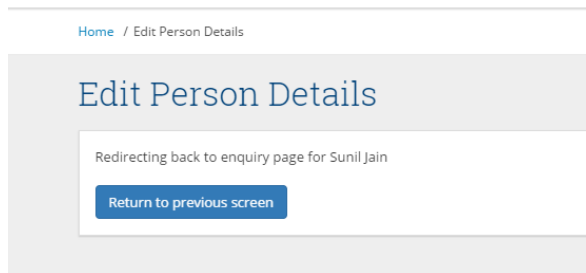
Title

Date of Birth
e.g. 01 Jun 2017

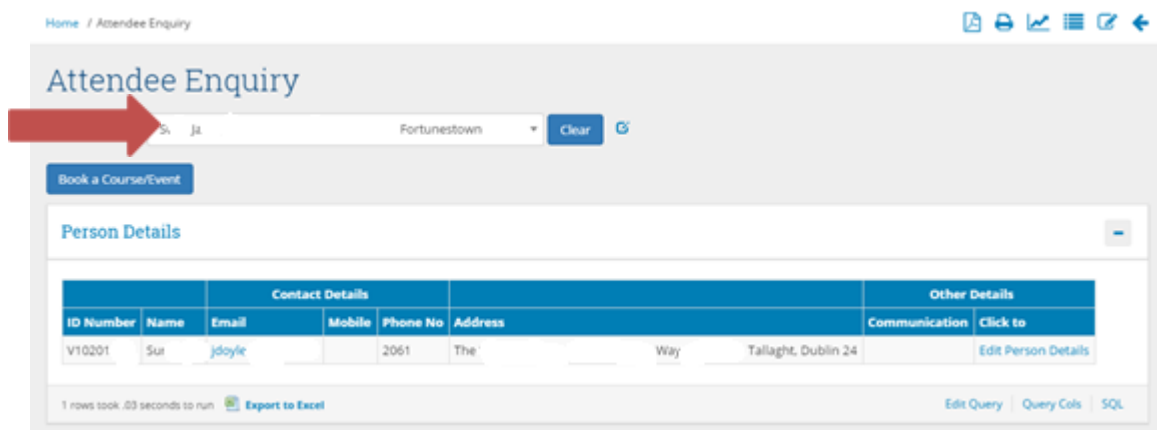
Gender

Organisation
If relevant, please enter your Organisation, College, GP Practice or Vet Practice etc.

8. Click **SAVE** to show the screen below

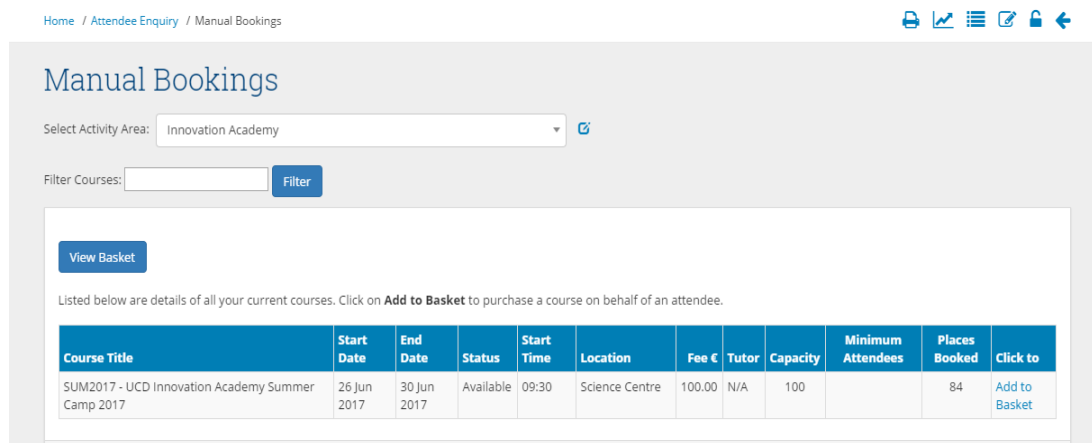


9. Click **RETURN TO PREVIOUS SCREEN** to display the screen below



NOTE: Ensure that the **SELECT ATTENDEE** field is displaying the correct details.

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



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

Home / Attendee Enquiry / Manual Bookings / Additional Booking Details

Additional Booking Details

Participants' name*

Home Telephone No.*

Mobile No*

Home Address*

Emergency Contact (usually a parent) - First Name*

Emergency Contact (usually a parent) - Last Name*

Emergency Contact (usually a parent) - Email Address*

Emergency Contact (usually a parent) -

NOTE: All fields marked * must be completed.

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

Basket for Sunil Jain

Please review the items in your basket below:

Code	Title	Qty	€			
SUM2017	UCD Innovation Academy Summer Camp 2017	100.00	Remove	Add Discount Code	Edit Booking	Book an Additional Place
Total Charge		100.00				

or

Please ensure your personal details are correct before proceeding.

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:

Home / Attendee Enquiry / Manual Bookings / Additional Booking Detail... / Basket for Sunil Jain / Add Discount Code

Add Discount Code

Please enter the discount code in the field provided.

Discount Code

Enter the relevant discount code.

16. Click **SAVE** to view the following screen:

Home / ... / Manual Bookings / Additional Booking Detail... / Basket for / Add Discount Code / Basket for Sunil Jain

Basket for Sunil Jain

Please review the items in your basket below:

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				

[Add Additional Items](#) or [Proceed to Checkout](#)

Please ensure your personal details are correct before proceeding.

[Update Personal Information](#)

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.



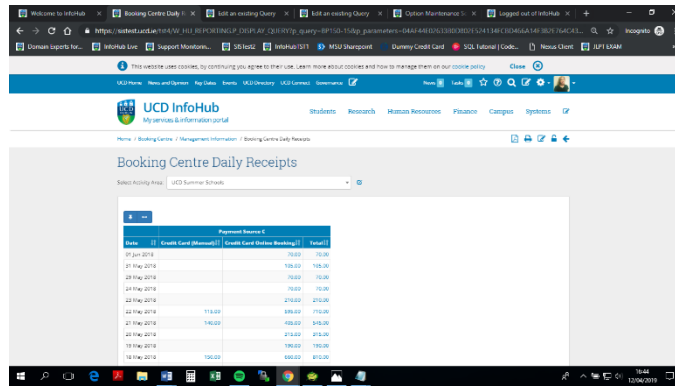
BOOKING CENTRE REPORTS – ‘MANAGEMENT INFORMATION’ - AN OVERVIEW

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

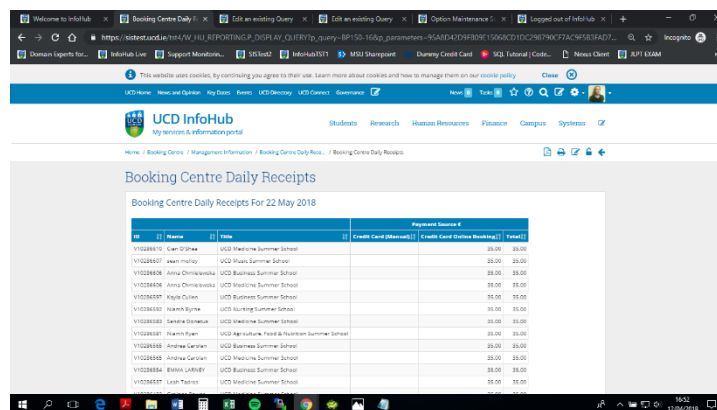
Select the correct **ACTIVITY AREA** from the drop-down list.



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

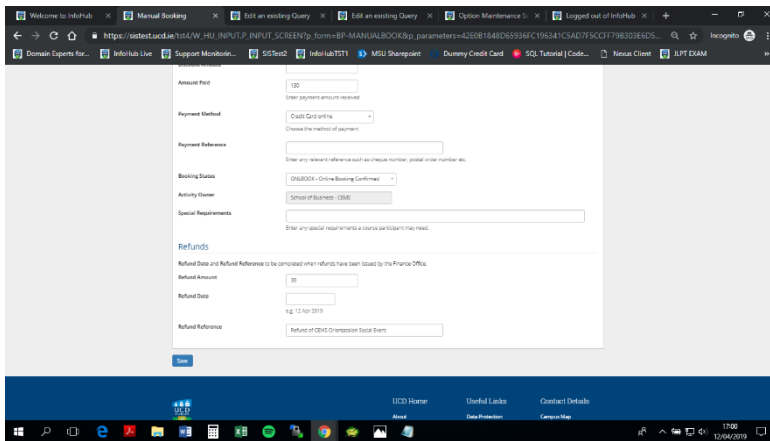
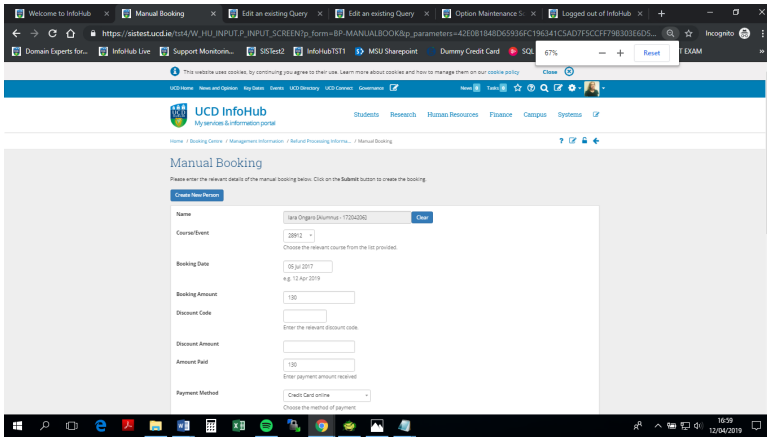
NOTE: There are two headings – one for **CREDIT CARD (MANUAL)** payments (recorded in UCD by using a hand-held device) and the other for **CREDIT CARD ONLINE BOOKING** payments.

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

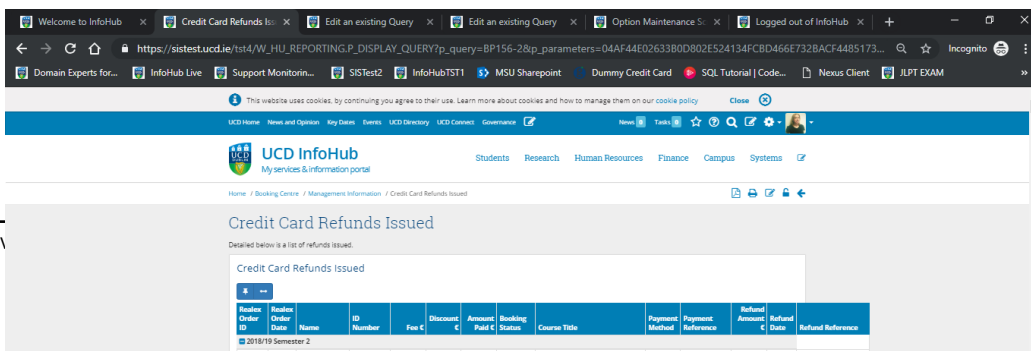
1. All refunds are processed manually and must be referred to accounts.queries@ucd.ie who will advise of the process. All refunds awaiting processing will be visible in this screen.
2. To make amendments to an individual refund click **UPDATE REFUND DETAILS** and the **MANUAL BOOKING SCREEN** will display.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



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.

Academic Year	Income			Receipts			Outstanding €
	Charges €	Expenditure €	Cancelled €	Payments €	Refund €	Net Receipts €	
Academic Year 2012-2013	97,702.25	-2,775.00	-3,859.00	81,589.25	52,871.55	-3,559.00	91,612.25
Academic Year 2013-2014	693,365.95	-23,301.72	-30,133.77	640,930.46	670,007.30	-30,133.77	639,873.53
Academic Year 2014-2015	874,820.85	-42,344.90	-28,513.45	885,662.30	895,184.75	-28,513.45	872,671.15
Academic Year 2015-2016	1,168,895.95	-82,244.05	-18,888.75	1,089,762.79	1,093,823.59	-18,888.75	1,074,942.34
Academic Year 2016-2017	1,844,893.53	-87,742.63	-17,122.95	1,540,017.95	1,551,828.40	-17,122.95	1,534,713.45
Academic Year 2017-2018	1,882,899.73	-88,818.70	-12,903.00	1,886,638.03	1,841,188.48	-12,903.00	1,828,283.48
Academic Year 2018-2019	1,303,179.20	-42,854.38	-7,108.35	1,248,748.50	1,241,472.85	-7,108.35	1,234,888.20
Academic Year 2019-2020	15	-63	0.00	12	12	0.00	0.00
Total	7,806,569.77	-396,278.98	-116,980.47	7,288,286.40	7,252,281.94	-116,980.47	7,228,381.47

CANCELLED BOOKINGS FOR ALL COURSES

1. 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.

Name	Course	Start Date	End Date	Booking Status	Booking Amount	Amount Paid	Payment Method	Payment Reference	Refund Amount	Refund Date	Click In
Susan Gray	62NRCL Method Development Strategies to Exploit Selectivity	17 Oct 2017	17 Oct 2017	Cancelled	0	0					Update Refund Details
Steven Mulroney	62NRCL Method Development Strategies to Exploit Selectivity	17 Oct 2017	17 Oct 2017	Cancelled	0	0					Update Refund Details
Suzanne Darcy	1 - Professional Practitioner	03 Nov 2018	03 Nov 2018	Cancelled	95						Update Refund Details
Catho McDonnell	1 night Accommodation - Wednesday	22 Jun 2016	23 Jun 2016	Cancelled	59	0					Update Refund Details
Rosanna Eisenmann	1-2-1 careers meeting validat	18 Jun 2019	18 Jun 2019	Cancelled	0						Update Refund Details
Clara Cera	10 Things in Backboard to Enhance Student Learning	27 Aug 2015	27 Aug 2015	Cancelled							Update Refund Details
Carlos Esquivel Hernandez	10 Things in Backboard to Enhance Student Learning	27 Aug 2015	27 Aug 2015	Cancelled							Update Refund Details

INCOME SUMMARY

- 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

The screenshot shows the 'Income Summary' page in the UCD InfoHub system. The table displays financial data across multiple terms from 2012/13 to 2017/18. The categories include Library Membership, 8 weeks Pre-Sessional Programme Category, and ACE Student Gym Classes.

Event Code	Title	2012/13 Semester 2	2012/13 Semester 1	2013/14 Semester 2	2013/14 Semester 1	2014/15 Semester 2	2014/15 Semester 1	2015/16 Semester 2	2015/16 Semester 1	2016/17 Semester 2	2016/17 Semester 1	2017/18 Semester 2	2017/18 Semester 1	Fees €
Library Membership														
CELibrary	2013 Annual library membership CVE	1,300.00												
CELibrary	2014-2015 Annual library membership CVE			1,800.00										
Total Library Membership		.00	1,300.00	.00	1,800.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
8 weeks Pre-Sessional Programme Category														
Total 8 weeks Pre-Sessional Programme Category		.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
ACE Student Gym Classes														
A1StopPump	ACE Body Pump (best tg)													.00
A1CWorke	ACE 1 Core work (best tg)													.00
A1CWorke	Test for 6th Sept tg													.00

This screenshot shows a different view of the 'Income Summary' report, highlighting the 'No. of Students' column alongside the financial data.

Event Code	Title	2012/13 Semester 2	2012/13 Semester 1	2013/14 Semester 2	2013/14 Semester 1	2014/15 Semester 2	2014/15 Semester 1	2015/16 Semester 2	2015/16 Semester 1	2016/17 Semester 2	2016/17 Semester 1	2017/18 Semester 2	2017/18 Semester 1	Fees €	No. of Students
Library Membership															
CELibrary	2013 Annual library membership CVE	1,300.00													36
CELibrary	2014-2015 Annual library membership CVE			1,800.00											18
Total Library Membership		.00	1,300.00	.00	1,800.00	.00	.00	.00	.00	.00	.00	.00	.00	3,100.00	54
8 weeks Pre-Sessional Programme Category															
Total 8 weeks Pre-Sessional Programme Category		.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
ACE Student Gym Classes															
A1StopPump	ACE Body Pump (best tg)													.00	0
A1CWorke	ACE 1 Core work (best tg)													.00	0
A1CWorke	Test for 6th Sept tg													.00	0

ADULT EDUCATION COURSES BY VENUE, DAY OR TERM

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

UCD InfoHub My services & information portal

Home / Booking Centre / Management Information / Adult Education Courses by Venue, Day or Term

Adult Education Courses by Venue, Day or Term

Select: 2018/19 Semester 2

Semester Description	Courses on Belfield Campus	Courses on Blackrock Campus	Courses on Other Campuses
2018/19 Semester 2	280	0	10

1 row took 12 seconds to run Report to Excel Edit Query Query Calc SQL

For help with the above information, please email infohub@ucd.ie

UCD Home Useful Links Contact Details
About Data Protection Campus Map
Research and Innovation UCD Privacy Statement
UCD Global Accessible Use Policy
Colleges & Schools

2. Click on the hyperlinked numbers to display the 'COURSES ON BELFIELD CAMPUS', 'COURSES ON BLACKROCK CAMPUS' or 'COURSES ON OTHER CAMPUSES'

UCD InfoHub My services & information portal

Home / Booking Centre / Management Information / Adult Education Courses by Term Day Venue

Adult Education Courses by Term Day Venue

Filter Courses: [Dropdown]

Courses on OTHER Campuses - 2018/19 Semester 2

Course Ref	Title	Year	Course Schedule	Start Date	Term	Delivery Mode	Location	Max of Students
18DC1010	Food Diet and Health Practice	Elect	ONLINE COURSE Tue 12:00 - 12:00 Thurs 12:00 - 12:00	22 Jun 2019	Online Course	Online Course		1
18DC1010	Food Diet and Health Theory	Elect	ONLINE COURSE Tue 12:00 - 12:00 Thurs 12:00 - 12:00	22 Jun 2019	Online Course	Online Course		1
2000Y1000	Her, Ancient and Modern World	Professor Robert Branigan	Students must check their online timetable before the module begins as all modules are subject to timetables or room changes.	21 Jun 2019	107L 1	Normal	UCD Belfield	1
2000Y1000	Her, Ancient and Modern World	Professor Robert Branigan	Students must check their online timetable before the module begins as all modules are subject to timetables or room changes.	21 Jun 2019	107L 1	Normal	UCD Belfield	2