



UCD Registry  
Clárann UCD

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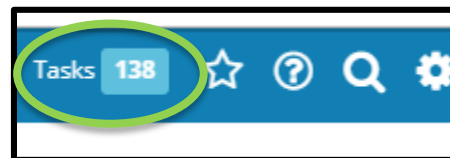


# UCD ONLINE DELEGATED AUTHORITY STUDENT DECISIONS SYSTEM

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# Introduction

The new **Online Delegated Authority Student Decisions System** is available through the new tracker tool solution in the **Tasks** menu of **InfoHub**.



This tracker tool has been developed by Enterprise Applications Group (formerly MSU) for university business processes, which require tracking and management of tasks and activities.

## By the end of this guide you will be able to:

- Create new Online Delegated Authority Student Decision requests (Section 1, page 2)
- Progress a request to **Submitted for Review** (Section 2, pages 3-4)
- Progress a request to **Proceed to For Board Decision** (Section 3, pages 5-6)
- Download reports for Board review -individual and bulk (Section 4, pages 7-9)
- Progress a request to **Proceed to approved - for Registry Action** (Section 5, page 10)
- Progress a request to **\*Proceed to approved - for Local Action only** \*applicable to 'Change to Module Registration' only (Section 6, page 11)
- Track the progress of a request (Section 7, pages 12-13)
- Review and download reports on Open and Closed Cases (Section 7, pages 12-13)

## Section 1

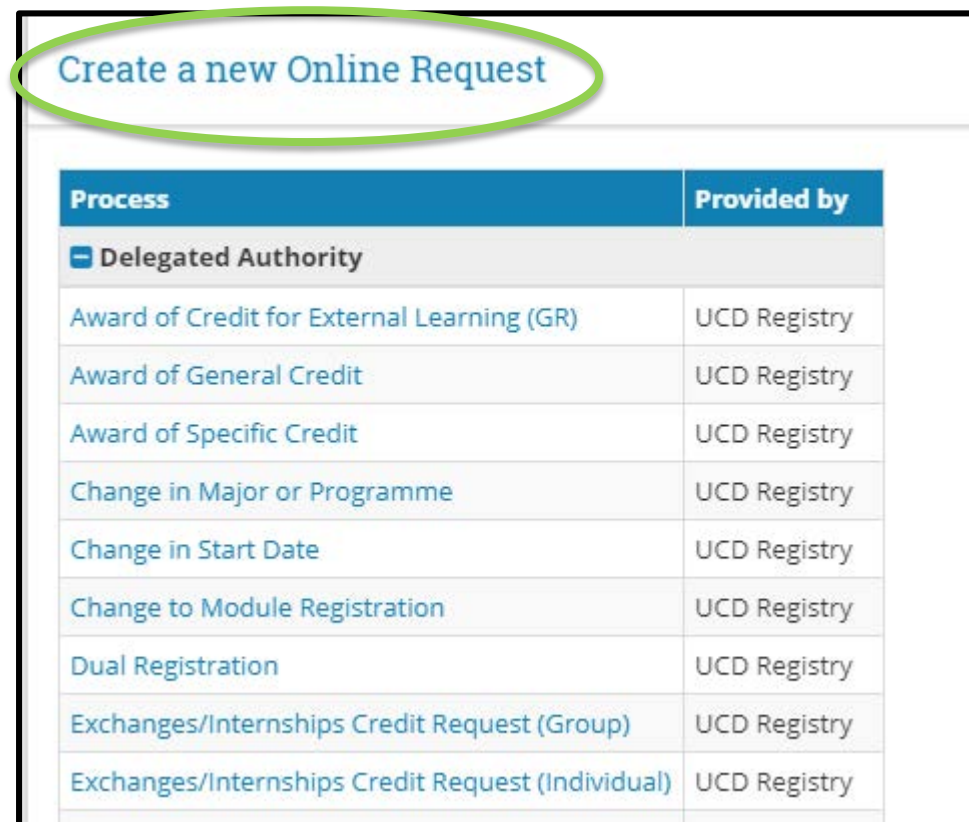
### How to create new online requests

#### To create an online request

- Log into **InfoHub** and navigate to **Infohub Tasks** which is located on the top menu bar to the left of your profile picture.
- Click on the required Delegated Authority Student Decision underneath the **Create a new Online Request** to start a new request for your area.

#### Additional Information

- This screen provides an overview of all approved requests that relate to Delegated Authority Student Decisions.
- Each decision houses advisory text to guide you through populating the required information.
- For support please email: [decisions@ucd.ie](mailto:decisions@ucd.ie)



Process	Provided by
- Delegated Authority	
Award of Credit for External Learning (GR)	UCD Registry
Award of General Credit	UCD Registry
Award of Specific Credit	UCD Registry
Change in Major or Programme	UCD Registry
Change in Start Date	UCD Registry
Change to Module Registration	UCD Registry
Dual Registration	UCD Registry
Exchanges/Internships Credit Request (Group)	UCD Registry
Exchanges/Internships Credit Request (Individual)	UCD Registry

## Section 2

# How to progress a request to *submit for review*

### Step 1: Populate the template

Step by step guidance is provided on what detail needs to be entered. Some decisions require a 2 screen step process i.e. the decision needs to be submitted first to allow you to enter the rest of the information via the **edit details screen** (applicable to *Exchange/Internships Credit Requests* and *RPL Pathways Programmes* for example). This instruction is also detailed in the advisory text.

### Step 2: Select the *Originating Area*

As part of this data entry section, you will be asked to select the This means that you are selecting what **Board** you want the decision to be **submitted to review** for. Please ensure to select **Originating Area**. the correct Board according to your role.

**\*Please note: you will only see the Boards that you have access to as part of your role.**

**The screen shot details a number of Boards for training guide purposes.**

The screenshot shows a web form with the following fields and options:

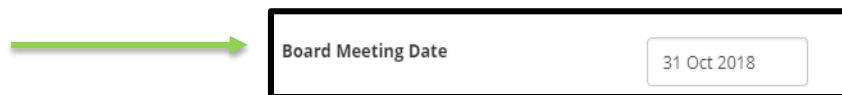
- Student\***: Input field with a **Check Name** button.
- New Major or Programme\***: Input field.
- Board Meeting Date**: Input field.
- Additional notes for Governing Board**: Input field.
- Originating Area\***: A dropdown menu is open, displaying a list of boards:
  - Administrative Services
  - Agriculture and Food Science Programme Board
  - Architecture, Landscape, Planning and Environmental Policy Programmes Board
  - Arts and Humanities Programme Board
  - Assessment
  - Board of Studies: Academic Affairs
  - Board of Studies: Global Engagement
  - Board of Studies: Research, Innovation and Impact
  - Business Undergraduate Programme Board
  - College Graduate School Board (Research) College of Business
  - College of Arts and Humanities Graduate School Board
  - College of Engineering and Architecture Graduate School Board
- Case Description**: Input field with a note: "Include an alternate title for reference".

## Section 2

# How to progress a request to *submit for review* continued...

### Step 3: Board Meeting Date

The option to enter a Board Meeting Date is available but is not a compulsory. The date can be entered on initial data entry or at a later point for reporting purposes.



A screenshot of a form field labeled "Board Meeting Date" with a date picker set to "31 Oct 2018". A green arrow points from the text above to this field.

### Step 4: Click *Submit* request

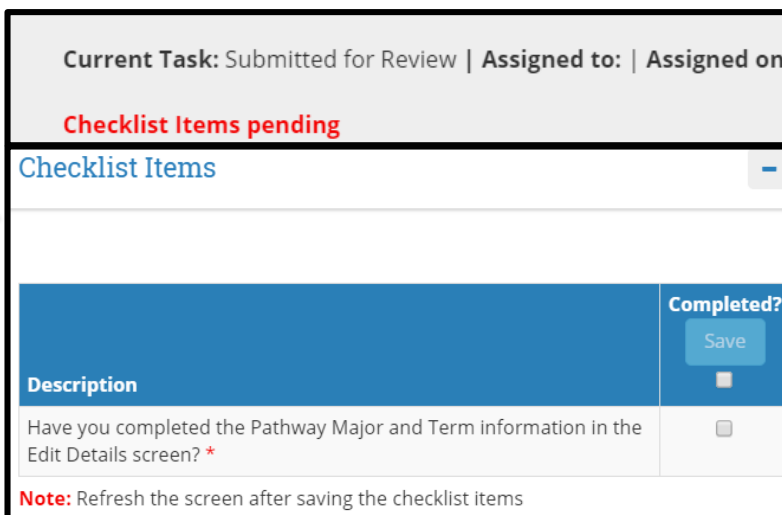
Once all required information is populated (be it via the 2 screen step or 1 screen) for review by the Programme Manager/Graduate School Manager or nominee, then you need to click the submit at the bottom left of the request entry screen.



A screenshot of a blue "Submit" button. A green arrow points from the text above to this button.

**\*Please note: if you are entering a decision which requires data entry via 2 screens then you will need use the 'edit details' section to complete screen 2 data entry and then you will need to tick the checklists item off and refresh the screen as per instructions provided before clicking submit.**

This screen shot is an example of an RPL Pathways Programme which still needs screen 2 data entered and the checklist items ticked off.



A screenshot of a checklist interface. At the top, it says "Current Task: Submitted for Review | Assigned to: | Assigned on:". Below that, it says "Checklist Items pending". The checklist has a header "Checklist Items" and a table with columns "Description" and "Completed?". The "Completed?" column has a "Save" button and a checkbox. The first item is "Have you completed the Pathway Major and Term information in the Edit Details screen? \*". A "Note" at the bottom says "Refresh the screen after saving the checklist items". A green arrow points from the note box above to this screenshot.

Description	Completed?
Have you completed the Pathway Major and Term information in the Edit Details screen? *	<input type="checkbox"/>

## Section 3

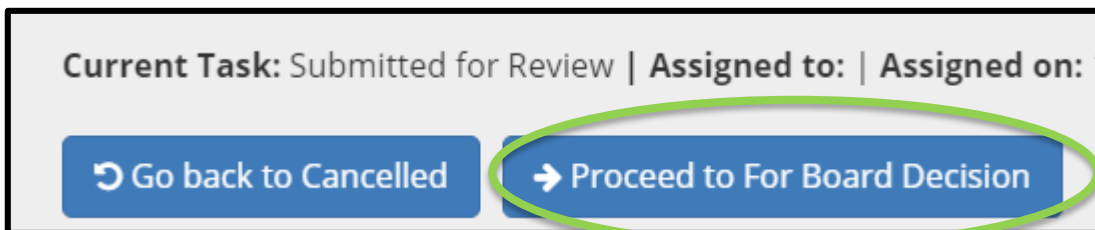
# How to progress a request to *Proceed to For Board Decision*

### Step 1: Review all requests submitted for review

Once requests have been put through for submitted for review, the Programme Manager/Graduate School Manager/Nominee can then use the:

- Tracker Manager Reports section (more detail on this in section 4, pages 7-9)
- The Tasks assigned to my Teams section (please see Section 3, page 6 of this document for more detail)
- Search Function in Tracker Management reports section

To review all requested submitted for review. If all data is correct and there are no errors, the request status can be updated to **Proceed to For Board Decision**



### Step 2: Print reports for Board Review

Once submitted requests have been proceeded for Board Decision, the accompanying board reports need to be generated. Please go to section to [see detail on how](#) to run individual and bulk reports for Board.

## Section 3

# How to progress a request to *Proceed to For Board Decision* continued...

To review requests that are submitted and are awaiting submission to Board for Decision, navigate to the **Tasks assigned to my teams** area in **InfoHub Tasks**.

- This tracking area is located on the left hand side of the **InfoHub Tasks** home page.
- The status of bulk and individual requests that have been **Submitted for Review** (i.e. awaiting submission to Board) can be tracked here.
- Click into the totals to access individual requests or see overview of all requests in that area.

Process	Status	Open Cases
- Delegated Authority		
Award of Credit for External Learning (GR)	Board Approved - Awaiting Registry Action	3
Award of Credit for External Learning (GR)	Registry - In Progress	3
Award of General Credit	Awaiting Board Decision	1
Award of General Credit	Board Approved - Awaiting Registry Action	3
Award of General Credit	Cancelled	1
Award of General Credit	Completed	8
Award of General Credit	Registry - In Progress	4
Award of General Credit	Submitted for Review	1

## Section 4

# How to download reports for Board Review

### Reports can be accessed from Tracker Management Reports:

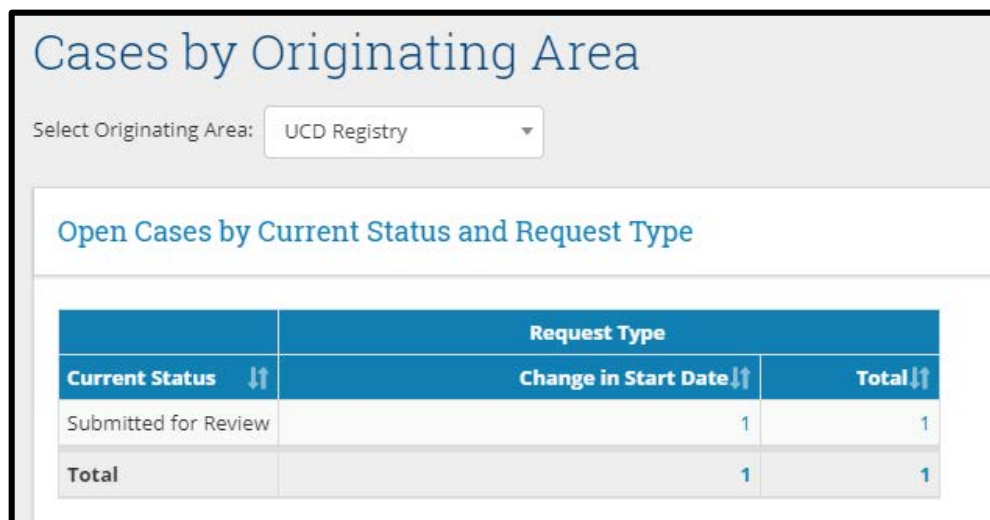
The below options are located Under **Tracker Management Reports** which is available on the **InfoHub Tasks** homepage in the upper left hand side of the screen

- My open cases
- Cases by Originating in Area(s)

**Note:** you can also search for individual requests using the **Search Case** button.

### Reports by area view

- From the **Select Originating Area** drop down menu, select your unit or area to access reports specific to your area.





## Section 4

# How to download reports for Board Review continued..

### Individual Reporting:

- To report on all Open Cases for a specific decision area/category, click on the total figure and then export to excel or PDF as required.
- To report on individual cases, click on individual reference numbers or use the search function.

### Tracker Management Reports

My Open Cases **Search Case** Cases by Originating Area(s)

Tracker Management Reports					
My Open Cases		Search Case		Cases by Originating Area(s)	
Process	Provided by	Open Cases	Closed Cases		
- Delegated Authority					
		17	1		
Award of General Credit	UCD Registry	25	4		
Award of Specific Credit	UCD Registry	22	3		
Change in Major or Programme	UCD Registry	23	9		
Change in Start Date	UCD Registry	34	14		
Change to Module Registration	UCD Registry	43	18		
Dual Registration	UCD Registry	18	4		
Exchanges/Internships Credit Request (Group)	UCD Registry	21	4		
Exchanges/Internships Credit Request (Individual)	UCD Registry	5	4		
Extension of Graduate Research Registration	UCD Registry	10	3		
Programme Exit Strategy	UCD Registry	23	6		
RPL Pathways Programmes	UCD Registry	24	2		
Retrospective Leave of Absence	UCD Registry	14	2		
Retrospective Withdrawal	UCD Registry	12	2		
Thesis Submission Deadline Extension	UCD Registry	13	5		
<b>Total</b>		<b>304</b>	<b>81</b>		

## Section 4

# How to download reports for Board Review continued..

### Bulk Reporting:

- To report on all Open Cases click on the total figure.
- To report on individual decision types, click on relevant total figure.
- For Board reports, click on the "For Board Decision" total figure.

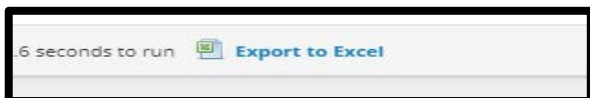
Cases by Originating Area

Select Originating Area: Administrative Services

Open Cases by Current Status and Request Type

Current Status	Request Type								
	Award of Specific Credit	Change to Module Registration	Dual Registration	Exchanges/Internships Credit Request (Individual)	Programme Exit Strategy	Retrospective Leave of Absence	Retrospective Withdrawal	Thesis Submission Deadline Extension	Total
Approved - for Registration	1			1	1	1	1		5
For Board Decision		1						1	2
Submitted for Review			2						2
<b>Total</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>9</b>

- Export to PDF by 'downloading as PDF with Documents'. This report will pull in a summary of all decisions and the individual detail behind each.
- You also have the option to export to excel.



Cases by Originating Area

Process: Total  
 Status: For Board Decision  
 Management Area:

[Download as PDF with Documents](#)

## Section 5

# How to progress a request to *Proceed to Approved* – *for Registry Action*

### Step 1: All requests approved by Board

Once requests have been approved by Board, the Programme Manager/Graduate School Manager/Nominee can then use the:

- Tracker Manager Reports section (more detail on this in section 4, pages 7-9)
- The Tasks assigned to my Teams section (please see Section 3, page 6 of this document for more detail)
- Search Function in Tracker Management reports section

to search for approved Case IDs and proceed all approved requests to **Proceed to Approved – for Registry Action**

Current Task: For Board Decision | Assigned to: [REDACTED] | Assigned on: 29 Nov 2018  
Case Description: [REDACTED]

Go back to Cancelled | Go back to Submitted for Review | Proceed to Board Rejected | **Proceed to Approved - for Registry Action**

### Step 2: All requests rejected by Board

Should the Board have rejected any of the requests, the **Proceed to Board Rejected** status should be selected. If a minor amendment is needed for the next Board then the **Go back to Submitted for Review** status can be used.

Current Task: For Board Decision | Assigned to: [REDACTED] | Assigned on: 29 Nov 2018  
Case Description: [REDACTED]

Go back to Cancelled | **Go back to Submitted for Review** | Proceed to Board Rejected | Proceed to Approved - for Registry Action

## Section 6

# How to progress to *Proceed to Board Approved - For Local Action*\*

\*Applies only to **Change in Module Registration Request**

### Step 1: All Change to Module Registration requests approved by Board

Once these requests have been approved by Board, the Programme Manager/Graduate School Manager/Nominee can then use the:

- Tracker Manager Reports section (more detail on this in section 4, pages 7-9)
- The Tasks assigned to my Teams section (please see Section 3, page 6 of this document for more detail)
- Search Function in Tracker Management reports section

to search for approved Case IDs and proceed all approved requests to **Proceed to Approved – for Local Action**

### Step 2: Local registration changes on Banner SFAREGS screen

Once these requests have been approved by Board and moved to local action status, the Programme Manager/Graduate School Manager/Nominee then needs to make the appropriate changes on Banner. Once the local action case is closed out by the local office team member, the auto comment will generate in Banner and UniShare (see page 12 for more detail on this).

## Change to Module Registration (237519)

**Current Task:** For Board Decision\* | **Assigned to:** | **Assigned on:** 10 Dec 2018

**Case Description:** Change in Registration

↩ Go back to Submitted for Review

➔ Proceed to Board Rejected

➔ Proceed to Board Approved - For Local Action

## Section 7

# Tracking the progress of a request

### Status of my Requests

- This tracking area is located on the lower right hand side of the **Infohub Tasks** home page.
- The status of individual requests that have been **progressed to Registry for action** can be tracked here.
- **Note:** Once Registry have completed a request, the request will be **closed** and will move from this area into the **Closed Cases** report which is available under the **Cases originating in my area(s)** section.
- A comment will automatically generate in both **Banner** (SPACMNT screen) and in **UniShare CRM** (Delegated Authority Information section) to reflect the change made to a student record by Registry on completion of a request – see pages
- Please note that the same action will occur for **Change in Module Registration** requests which are handled locally.

**Status of my Requests**

Listed below are cases initiated by you.

Reference	Process	Status	Latest Activity
180933	Award of Credit for External Learning (GR) for 10731843	Board Approved - Awaiting Registry Action	05 Oct 2018
180535	Award of Credit for External Learning (GR) for 16213309	Board Approved - Awaiting Registry Action	05 Oct 2018
180929	Award of General Credit for 10731843	Board Approved - Awaiting Registry Action	05 Oct 2018
181061	Award of General Credit for 17200122	Submitted for Review	04 Oct 2018
180671	Award of Specific Credit for 10731843	Submitted for Review	09 Aug 2018
180533	Change in Start Date for 16213309	Awaiting Board Decision	09 Aug 2018

## Section 7

# Tracking the progress of a request

### SPACMNT

- When an action is fully completed, the decision will move to the **Closed Cases** report in **Tracker Management Reports** area. This action will also generate an automatic process of applying a comment to SPACMNT on the student record.

ID: [REDACTED] [REDACTED] [REDACTED]

**Comment Type:** APL ▾ Accreditation Prior Learning

**Originator:** PBD ▾ Programme Board Decision

**Contact:** [REDACTED] ▾

**Contact Date:** [REDACTED] [Calendar Icon]

**Appointments** [Icon]

**From Time:** [REDACTED]

**To Time:** [REDACTED]

Confidentiality

**Add Date:** 05-OCT-2018 [Calendar Icon]

**Activity Date:** 05-OCT-2018

**Last Updated by:** WWW\_USER

**Comments:**

Specific Credit Awarded for [REDACTED] Term: 2017/2018 January (201701), Programme: GCSCI002 - Graduate Certificate, Major: F077 - GCEnvSustainability(Neg) JanFT, Stage: 1

## Section 7

# Tracking the progress of a request

### UniShare

- In addition to a SPACMNT comment, this action will also generate an automatic comment to a new **Delegated Authority Information** section on a student record in UniShare.

Delegated Authority Information			
Comment	Date Entered	Last Modified	Last Modified By
Specific Credit Awarded for [REDACTED] [REDACTED] Term: 2018/2019 September (201800), Programme: BHARCH001 - Architectural Science, Major: SSS1 - Architecture, Stage: 2, Case: 226961	17 Oct 2018	17 Oct 2018	WWW_USER
Specific Credit Awarded for [REDACTED] [REDACTED] Term: 2018/2019 September (201800), Programme: BHARCH001 - Architectural Science, Major: SSS1 - Architecture, Stage: 2, Case: 227232	01 Nov 2018	01 Nov 2018	WWW_USER

## Section 7

### Tracking the progress of a request continued..

#### Open and Closed Cases

- To view open and closed cases see the **Tracker Management Reports** overview section.
- Click on the figure under open or closed cases against individual decisions to view all cases within that decision type.
- For an overview or to report on **ALL** open or closed decisions click on the **total** figure at the bottom of the screen.

**Tracker Management Reports**

My Open Cases   Search Case   Cases by Originating Area(s)

Process	Provided by	Open Cases	Closed Cases
- Delegated Authority			
Award of Credit for External Learning (GR)	UCD Registry	17	1
Award of General Credit	UCD Registry	25	4
Award of Specific Credit	UCD Registry	22	3
Change in Major or Programme	UCD Registry	23	9
Change in Start Date	UCD Registry	34	14
Change to Module Registration	UCD Registry	43	18
Dual Registration	UCD Registry	18	4
Exchanges/Internships Credit Request (Group)	UCD Registry	21	4
Exchanges/Internships Credit Request (Individual)	UCD Registry	5	4
Extension of Graduate Research Registration	UCD Registry	10	3
Programme Exit Strategy	UCD Registry	23	6
RPL Pathways Programmes	UCD Registry	24	2
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Clárann UCD

**UCD Registry**  
University College Dublin  
Belfield  
Dublin 4

W: [www.ucd.ie/registry](http://www.ucd.ie/registry)  
E: [registry@ucd.ie](mailto:registry@ucd.ie)